IDC MarketScape

IDC MarketScape: Asia/Pacific Cloud Professional Services 2023–2024 Vendor Assessment

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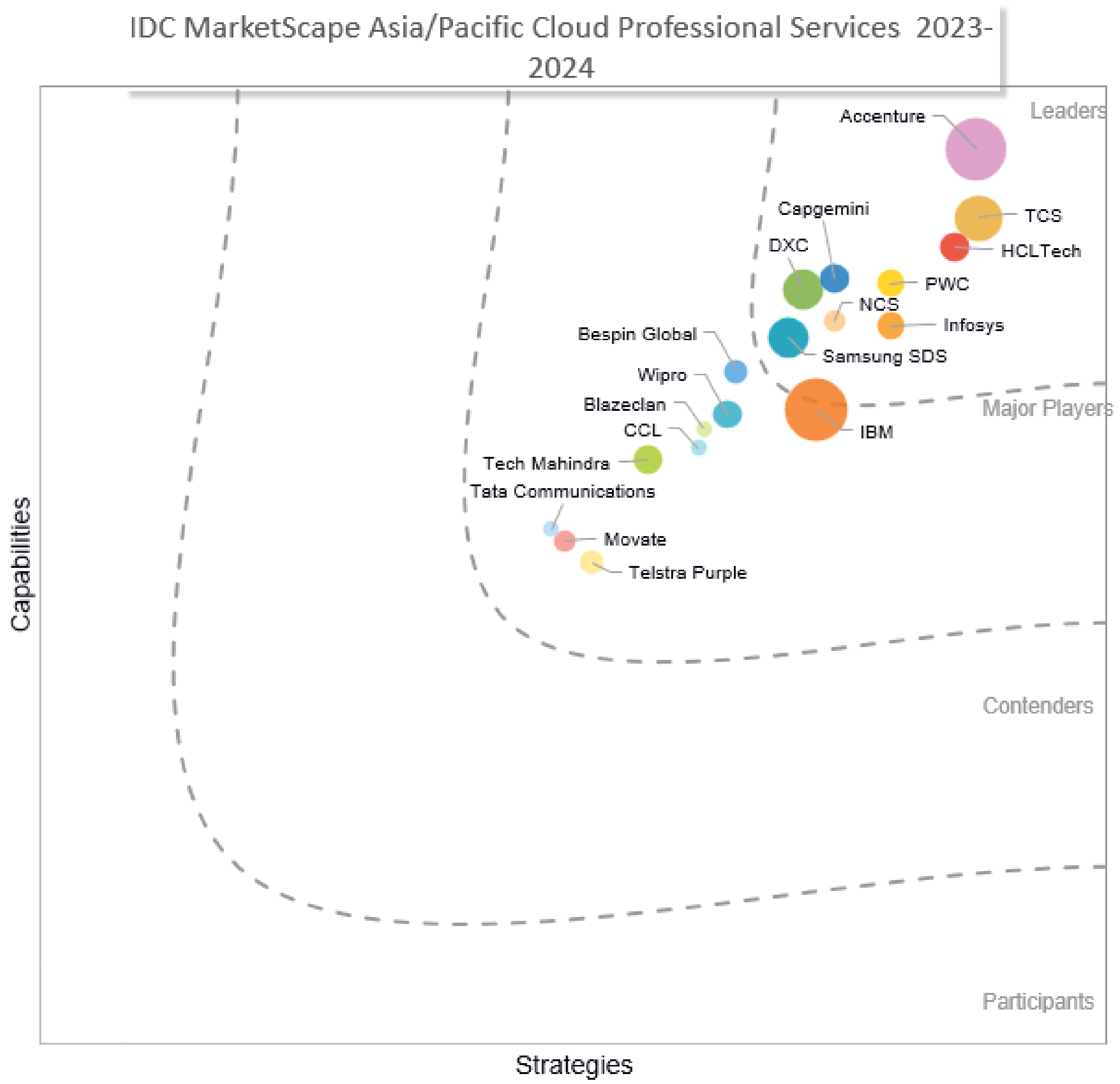
THIS MARKETSCAPE EXCERPT FEATURES: ACCENTURE

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: IDC Asia/Pacific Cloud Professional Services Vendor Assessment



Source: IDC, 2023

November 2023, IDC #AP50426623e

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Asia/Pacific Cloud Professional Services 2023-2024 Vendor Assessment (Doc #AP50426623e). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Advice for Technology Buyers, Featured Vendor Profile, Appendix and Learn More. Also included are Figure 1 and Figure 2.

IDC OPINION

This IDC study represents the vendor analysis and assessment of the 2023–2024 Asia/Pacific cloud professional services (CPS) market through the IDC MarketScape model, which is a result of detailed vendor assessment with information gathered from vendor responses to IDC's request for information, vendor briefings and sharing sessions, customer references, and IDC's internal research. Please refer to the Methodology and Market Definition sections of the Appendix for a detailed market definition and scope of research coverage.

The following are some of the key findings from the study:

- IDC's assessment of aggregated customer feedback suggests that CPS vendors generally performed well on the following:
  - Services at the infrastructure layer (infrastructure as a service [IaaS])
  - Seeking client feedback and acting on it in a timely manner
  - Complying with new or existing regulations
  - Providing technical insights and competence
- In contrast, average customer feedback was least satisfied with the following parameters:
  - Reducing costs for the customer
  - Services at the application layer
  - Improving employee satisfaction, retention, and productivity
  - Delivering innovation around cloud products
- There were also attributes in which significant variability was observed in the feedback collected across vendors. IDC believes these are areas in which vendors can clearly differentiate themselves from their peers. CPS vendors could differentiate themselves in terms of:
  - Reducing costs for the customer
  - Leveraging resources globally
  - Rewarding client loyalty
  - Helping enterprises build/implement a governance model for their cloud implementation

Given the breadth of professional services and deployment configurations included in the assessment, it was interesting to note the nuances and differentiators in vendors' focus and strategy. While some of the participating firms demonstrated a clear strategic focus on public cloud and cloud-native services delivery, others have invested in building their own private cloud offerings that act as useful alternative for customers with specific requirements and use cases.

There was meaningful difference observed in vendors' relative focus, assets, and delivery capabilities across the infrastructure, platforms, and applications layers.

Finally, there was also significant variance in vendors' regional presence and delivery capabilities across different Asia/Pacific subregions.

IDC recommends that end users leverage this document and engage with IDC analysts to understand the vendors' strengths and capabilities within their country of operation and suitability for their specific requirements to identify the partner best equipped to help them achieve their cloud transformation objectives.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The inclusion of vendors in this IDC MarketScape is determined by their ability to meet the following conditions:

- Vendors with a minimum of US$60 million project-oriented IT services revenue in the Asia/Pacific region for CY22 (as recorded in IDC's Services Tracker 1H23) or US$10 million of CPS revenue from the Asia/Pacific region for CY22
- Vendors with CPS clients or delivery capabilities in at least two Asia/Pacific subregions (among Greater China, Japan, Australia/New Zealand [ANZ], Southeast Asia, Korea, and India) during 2022

ADVICE FOR TECHNOLOGY BUYERS

Based on this study, IDC offers the following recommendations to buyers looking for CPS as they embark on their cloud migration or modernization journeys:

- **App modernization and cloud-native application development.** There is a strong emphasis in the Asia/Pacific market to leverage modern applications to deliver innovation and superlative customer experiences that are deemed critical to business success. This is evident in data from *IDC's Future Enterprise Resiliency and Spending Survey, Wave 6* (July 2023), which reveals that enterprises in the region identify application development and deployment platforms as the technology spending area most immune to budget cuts regardless of the economic environment. The opportunity to modernize applications needs to be a default consideration when embarking on a cloud migration exercise. Look for partners that bring expertise across the entire spectrum of cloud migration and modernization approaches, with a particular emphasis on refactoring, rewriting, and cloud-native app development.
- **Multi and hybrid cloud environments.** Multicloud is a concrete reality in the current Asia/Pacific market, with just under half (49%) of Asia/Pacific enterprises surveyed in the *IDC Asia/Pacific Cloud Survey 2023* (September 2023) acknowledging that they consciously spread their resources, skills, and development efforts across multiple public clouds. Additionally, there is a strong appetite for true hybrid cloud environments as the next logical evolutionary step. When looking for a CPS provider, make sure the vendors you short-list have capabilities not just across the cloud platforms you are interested in but also have robust hybrid cloud strategy and strong cross-cloud integration, governance, and management capabilities.
- **End-to-end cloud life-cycle services.** While this study exclusively looks at the spectrum of CPS, ongoing management, governance, optimization, and support are essential downstream capabilities for enterprises to continue extracting optimal value from their cloud transformation initiatives. In fact, in *IDC's Asia/Pacific Enterprise Services Sourcing Survey 2023* (August 2023), enterprises identified managed cloud services as a key sourcing consideration in their selection of a CPS partner. As you embark on your cloud transformation journey, think through your strategy for day 2 operations, governance, enhancement, and optimization to help inform your transformation partner selection.
- **East-west migration across the Eastern and Western cloud stacks.** An interesting dynamic in the Asia/Pacific region created by the ongoing geopolitical tensions between the United States and China is the birth of the notion of western (Amazon Web Services [AWS], Azure, Google

Cloud Platform [GCP], and so forth) and China (Alibaba, Huawei, Tencent, and so forth) cloud stacks that look increasingly disconnected. This has created new concerns for enterprises with operations that straddle the stacks (and want a common orchestration and management mechanism across these stacks) or who want to migrate between the stacks. If your enterprise has such requirements, you need to carefully assess vendors' capabilities across these stacks, as well as their investment in and continued commitment to specific cloud platforms of interest to you.

- **Use this evaluation in your vendor selection process.** Use this IDC MarketScape as a tool not only to short-list vendors for CPS bids but also to evaluate vendors' proposals and presentations. Understand where these players are truly differentiated and take advantage of their expertise (technical, industry based, or otherwise).

FEATURED VENDOR PROFILE

This section briefly explains IDC's key observations resulting in Accenture's position in the IDC MarketScape. The description here provides a summary of the vendor's strengths and opportunities.

Accenture

According to IDC analysis and buyer perception, Accenture is positioned in the Leaders category in this 2023–2024 IDC MarketScape for Asia/Pacific CPS.

Accenture's Total Enterprise Reinvention model envisages the use of cloud (and cloud-powered digital technologies) to transform enterprise operations across three layers — infrastructure and security, data and AI, and platform and applications. It delivers this transformation through the Accenture Cloud First initiative that brings together technical, industry vertical, and delivery capabilities and assets from across the organization to deliver value to customers. Accenture delivers a comprehensive suite of CPS spanning design and strategy, infrastructure, networking, edge, applications, data and AI, security, sustainability, and operations across the full maturity spectrum of the enterprise cloud journey.

Accenture has long-standing partnerships with and strong technical capabilities across a broad set of hyperscalers (AWS, Azure, Google, Oracle Cloud Infrastructure [OCI], Alibaba, IBM), hybrid cloud platforms (VMware, Red Hat), and ISVs (Salesforce, ServiceNow, Workday, Pega, Snowflake, and so forth). To provide industry-aligned contextualization, Accenture has evolved 19 industry-specific cloud narratives supported by architecture blueprints and preconfigured solutions co-developed with partners.

Supporting Accenture's CPS delivery is a rich suite of platforms that includes myNav (full-spectrum cloud transformation platform that supports hybrid cloud capability), myWizard (AI-enabled process, software development, and operations automation and optimization), and cloud data modernization (CDM) asset suite. Accenture's commitment to continually invest and enhance its platform capabilities is evident in the recently unveiled Continuum Control Plane, intended as a hybrid and multicloud command and control center. Accenture's experience with cloud transformation projects, codified into its platforms, processes, and templates, allows it to execute cloud migration and modernization exercises in a quick, consistent, and repeatable manner.

Strengths

- Accenture's strong technical capabilities across a diversity of platforms and technology partners allow it to service complex customer requirements effectively in multi and hybrid cloud environments. This is reflected in customer feedback as well.
- Customers that IDC interacted with expressed a high degree of overall satisfaction with Accenture. They specifically commended the vendor for its ability to drive innovation and provide both technical and industry-specific competence.

Challenges

- Accenture has a robust network of delivery capabilities across the Asia/Pacific region, but customer feedback suggests that the vendor could further improve its global/local resource mix in the delivery of projects.
- Some customers that IDC interacted with indicated that the vendor could do better on cost reduction, flexibility of pricing models, and ability to handle changes in project scope.

Consider Accenture When

Consider Accenture when you are looking for a cloud transformation partner with the expertise, assets, and experience to help transform your large, complex IT estate into an optimized, cloud-centric business and operational model.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is with customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and GTM plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the relative market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

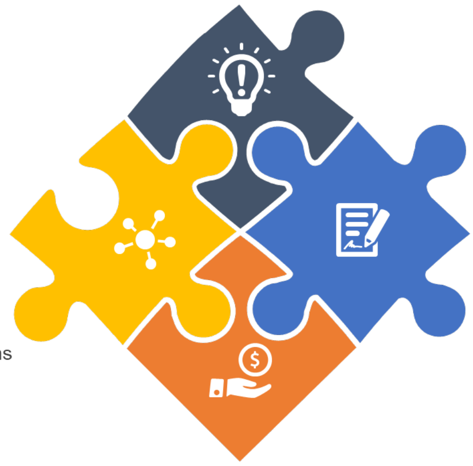
IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

Cloud professional services (CPS) are considered a qualified subset of IT project-oriented services that fall under the existing foundation markets outlined in *IDC's Worldwide Services Taxonomy, 2023* (IDC #US50514623, September 2023). This market includes elements from four of IDC's services foundation markets, specifically: IT consulting, systems integration (SI), custom application development (CAD), and network consulting and integration services executed in the service of an enterprise's migration or modernization into public, private, or hybrid cloud environments. Examples of specific CPS are shown in Figure 2.

FIGURE 2

Examples of Cloud Professional Services



IT Consulting

- Maturity assessments
- IT strategic planning
- Discovery and Dependency Mapping
- Vendor relationship management

Network Consulting & Integration

Systems Integration

- Migrating & integrating legacy systems and workloads to cloud
- Implementing multi and hybrid cloud environments
- Operationalizing Cloud Application Platforms

Custom Application Development

- Development using cloud application PaaS or services from AWS, Microsoft Azure, etc.
- Setup of a custom-made development environment
- Legacy modernization through code re-write

Source: IDC, 2023

IDC acknowledges that in some markets or geographies, CPS may not be offered discretely, in other words they are embedded in larger cloud services offerings. Examples could include delivery of SI or CAD services for the cloud offerings of other third parties (e.g., SI/consulting/CAD/support services for Salesforce's CRM and Salesforce Platform, or SI/consulting/CAD/support services for "SAP on AWS," and so forth). These would qualify as CPS.

LEARN MORE

Related Research

- *IDC Asia/Pacific Cloud Strategy Perspectives 2023: Implications for Cloud Professionals and Managed SPs* (IDC #AP50334823, September 2023)
- *IDC Asia/Pacific Digital Infrastructure Perspectives, Trends, and Challenges, 2023: Implications for Cloud Professional and Managed SPs* (IDC #AP50335223, September 2023)
- *Australia's Managed Cloud Services Priorities and Trends* (IDC #AP50336123, July 2023)
- *IDC MarketScape: Worldwide Cloud Professional Services 2022 Vendor Assessment* (IDC #US48061322, April 2022)

Synopsis

This IDC study represents the vendor assessment of the 2023 cloud professional services (CPS) market through the IDC MarketScape model. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and help anticipate its ascendancy. This IDC MarketScape covers a variety of vendors participating in the Asia/Pacific CPS market. This evaluation is based on a comprehensive framework and set of parameters expected to be most conducive to success in providing CPS in both the short and long term. A key component of this evaluation is the inclusion of the perception of buyers of both the key characteristics and the capabilities of their CPS provider.

"The cloud is now well and truly established as the operating model and delivery platform of choice for digital business, and cloud professional services providers are critical to helping businesses transition themselves to a modern, cloud-centric model," says Pushkaraksh Shanbhag, associate director, Cloud and IT Services. "However, the breadth of transformational scenarios that cloud professional services encompasses — app migration and modernization, cloud-native application development, cloud-centric enterprise platform implementation and integration, hybrid and edge cloud implementation, industry-specific cloud offerings, data modernization and integration, and so forth — necessitates a careful evaluation of providers vis-à-vis your specific requirements. This report is intended to help enterprises with such an evaluation."

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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