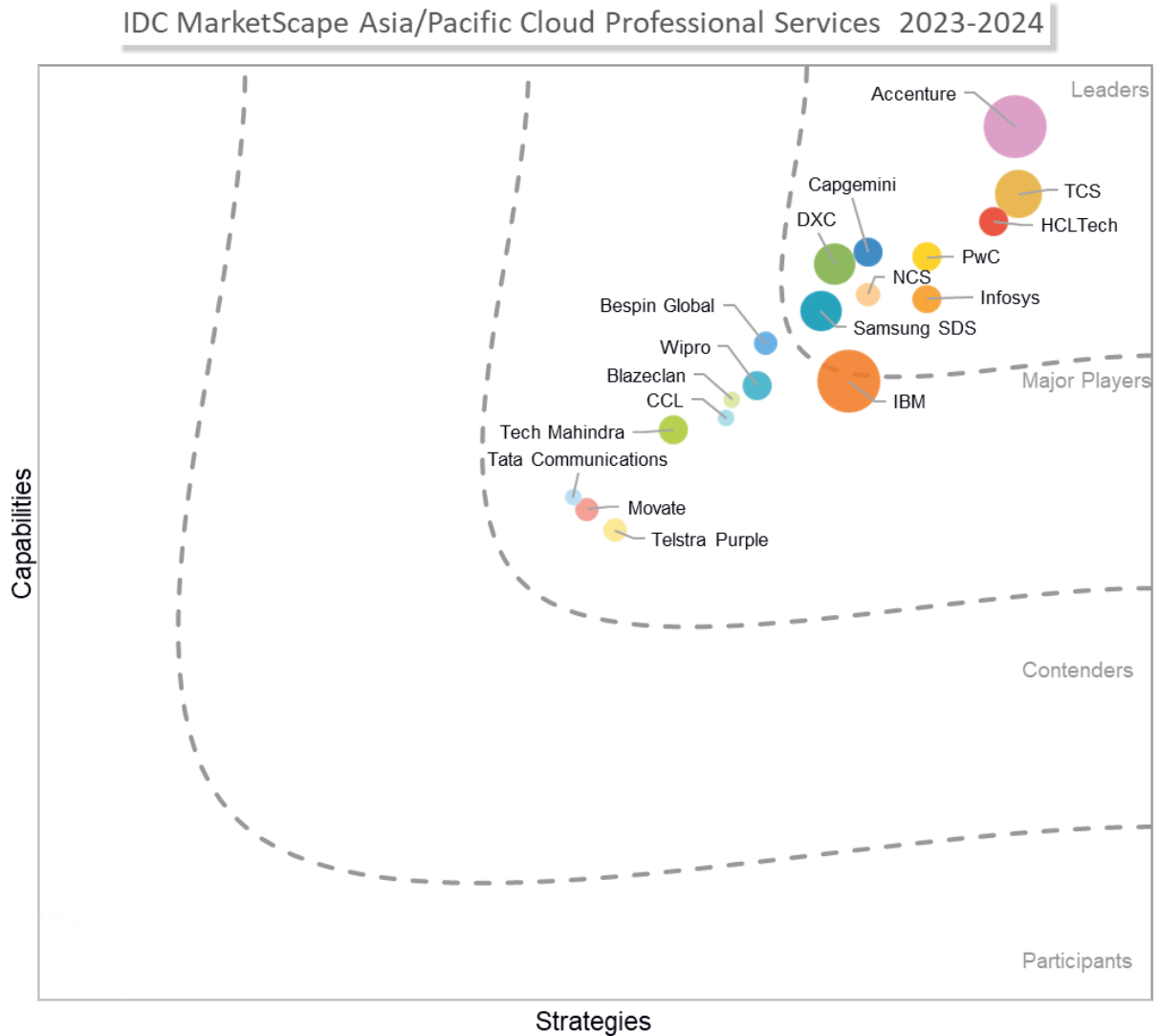# IDC MarketScape: Asia/Pacific Cloud Professional Services 2023–2024 Vendor Assessment

Pushkaraksh Shanbhag

IDC MARKETSCAPE FIGURE

FIGURE 1

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

IDC MarketScape Asia/Pacific Cloud Professional Services 2023-2024

Source: IDC, 2023

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

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 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 engagement 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 clear 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) acknowledged 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 birthing 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). The vendor profile section of each profiled vendor details areas of strengths and potential challenges as identified by clients. Also, tips about when to consider a provider are included at the end of each profile.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each 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 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.

Bespin Global

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

Bespin Global (referred to as Bespin in this profile) was founded in 2015 and is a South Korea–based provider of cloud professional and managed services. Bespin provides cloud services across a host of global, regional, and local cloud providers — AWS, Azure, GCP, Oracle, Alibaba Cloud, Huawei, Tencent, Naver, and KT Cloud. Bespin's regional footprint in Asia/Pacific is currently strongest in South Korea and China, but the vendor is actively ramping up its presence in Southeast Asia with offices in Singapore, Vietnam, and Indonesia. The vendor's Japan strategy consists of continued investment in G-Gen (GCP-focused MSP) and ServerWorks (AWS partner).

Staying true to its vision of being the "world's most automated cloud management company," Bespin places a strong emphasis on maximizing the amount of automation it employs in its CPS delivery through proprietary platforms and tools, such as its OpsNow family of products/tools that includes DevOS (DevOps platform), FinOps, AlertNow (incident management), IoTOps, and OpsNow Security, among others. The vendor is further investing in developing and marketing OpsNow as a multicloud management platform, which it also plans to offer in an as-a-service model.

Bespin executes the delivery of its CPS through a combination of two orthogonal teams. The first is a team of vertical-specific project managers supported by vertical-aligned sales and presales personnel, which is responsible for client engagement and interfacing. The second is a technology aligned team of specialists (grouped by technology areas). Resources are drawn from each of these pools to create cross-functional project teams. The vendor also has identified industry-specific priorities for future growth — AI and data (financial services, retail, and public sector), smart factory, Industrial Internet of Things (IIoT), manufacturing execution systems (MES), and vision (manufacturing).

Strengths

- Bespin has a relentless focus on driving automation and operational efficiency even in its CPS delivery. Additionally, the vendor boasts strong technical capabilities across a wide breadth of cloud environments.
- Customers that IDC interacted with expressed high satisfaction with Bespin's ability to improve operational efficiency, provide high-quality talent, and deliver excellent customer service.

Challenges

- Bespin has a robust customer base in Korea and is expanding its footprint in the Southeast Asia market but faces some tough choices regarding its China strategy, which will likely require realignment of resources and some changes in business priorities.
- As Bespin gears up to increase its proportion of enterprise clients, it will increasingly come up against client requirements for more complex traditional IT estate constructs (legacy estates, mainframes, and such). Bespin's singular cloud-first focus might present some limitations in these situations.

Consider Bespin Global When

Consider Bespin when you are looking for an agile, cloud-first vendor that has strong capabilities across a breadth of cloud providers and brings with it a strong focus on automation and operational efficiency.

Blazeclan Technologies

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

Blazeclan Technologies (referred to as Blazeclan in the rest of the profile) is an India-based born-in-the-cloud provider of cloud professional and managed services and has been an AWS Partner Network (APN) since 2011. Blazeclan is also a pure-play cloud services provider and has capabilities across AWS, Microsoft Azure, GCP, HashiCorp, Snowflake, Databricks, and Oracle (planned).

Blazeclan's spectrum of cloud services spans consulting, engineering, modernization, and managed services across four technology domains — data analytics and insights, application modernization, cloud infrastructure, and cloud security. This cloud-agnostic services portfolio is supported by Blazeclan's suite of proprietary products and frameworks, which includes Cloudlytics (Cloud Security Posture Management platform for asset monitoring and regulatory/compliance checks), BlazePulse (AIOps - cloud service management platform), cAssure (cloud migration framework), Data Lake in a Box, and cSecure (cloud security framework), among others. In addition to its expertise in cloud-native paradigms and capabilities for modern application development, Blazeclan offers DevOps Transformation or DOT framework to help enterprises adopt, adapt to, and scale their enterprise DevOps journey.

Although Blazeclan has regional (Asia/Pacific) delivery centers in Singapore, Australia, and Malaysia, the bulk of its delivery capabilities during project delivery is sourced from its global delivery center in India. The vendor demonstrates a strong focus on continuous skilling and has clearly defined cross and upskilling processes to ensure that it has a ready pool of market-relevant cloud skills.

Strengths

- Blazeclan has a proven track record of helping enterprises execute migration into public cloud environments efficiently and at speed through a combination of capable resources, frameworks, platform-native and proprietary tooling, and flexible engagement models.
- Customers that IDC interacted with expressed high overall satisfaction with the vendor's customer centricity and were particularly satisfied with the vendor's ability to apply proven cloud methodologies, implement multicloud environments, and optimize cloud-related spend.

Challenges

- Although the vendor is well equipped to provide multi public cloud expertise and services, it is not particularly well equipped to serve customers that have significant on-premises/private cloud or true hybrid cloud requirements.
- Customers that IDC interacted with indicated that the vendor could improve its ability to provide industry-specific solutions and services and do more to help improve business agility.

Consider Blazeclan Technologies When

Consider Blazeclan when you are planning a public cloud-centric migration or modernization exercise and want to engage with a vendor with deep technical skills that can bring predictability to engagement and cloud costs.

Capgemini

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

Capgemini envisions cloud as a technology enablement platform that enables three types of transformation — IT, data driven, and business — across three CXO playing fields — enterprise

management, customer first, and intelligent industry. The vendor's suite of CPS includes rapid estate assessment, cloud capability maturity assessment, cloud strategy, cloud road map, cloud business case, cloud architecture/platform/assessment, cloud operating models, cloud adoption framework, change management, cloud transformation office, and sustainable cloud. The vendor also embeds sustainability into all its services offerings.

In 2021, Capgemini created a new global cloud portfolio team to drive solution/offer innovation around cloud and infrastructure portfolio capabilities and sector-specific offerings. This team draws on innovation from across the group to create industrialized solutions that can be leveraged across regions. The vendor also launched a new groupwide go-to-market (GTM) framework to drive business outcome conversations and solutions with clients focused on industries, customer experience, and enterprise IT.

The vendor works closely with hyperscalers and key technology partners (AWS, Azure, GCP, SAP, VMWare, Oracle, ServiceNow, Salesforce) in selected verticals and geographies to create joint innovative solutions and GTM campaigns for them. Some examples include AutoCloud for automotive suppliers and OEMs, retail grocery, fast digital for discrete industries with SAP, enterprise transformation initiative with AWS, factory of future and DCM with Microsoft, and so forth.

Strengths

- Capgemini brings together strong business consulting, design thinking, product engineering, and CPS capabilities to help customers with organizational transformation initiatives.
- Customers that IDC interacted with acknowledged the vendor's technical capability, project execution abilities, and ability to drive operational efficiency.

Challenges

- Capgemini can further evolve its pricing strategy and innovate engagement models to cater to a broader set of customers in the region.
- Customer feedback indicates that the vendor can further improve its ability to help customers reduce costs, optimize vendor management, and reward client loyalty.

Consider Capgemini When

Consider Capgemini when you are looking for a vendor that can bring together strong consulting capabilities and deep product engineering expertise to transform your enterprise operations through cloud migration.

CCL

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

Based in New Zealand, CCL (abbreviated from the vendor's legal name, Computer Concepts Limited) was acquired by telecommunications provider Spark in 2015 and is known for its IT services capabilities. Its integration with Revera in 2019 resulted in CCL increasing its market share by expanding significantly into the public sector. CCL's cloud infrastructure services capabilities are a core component of Spark's cloud and IT services portfolio, and the recent integration of Leaven (cloud and transformation consulting) into CCL further strengthens its professional services capabilities.

CCL has strong partnerships with AWS and Microsoft Azure and has built robust professional services capabilities on both the hyperscalers. This complements its traditional strength in infrastructure managed services and provides the foundations for its enterprise private and hybrid cloud services. CCL uses an agile, squad-based delivery model of cross-functional teams with a strong focus on execution and delivery quality. CCL leverages the capabilities and specializations from the wider Spark Business Group for vertical-specific GTM strategies and subject matter expertise. In the absence of hyperscaler regions in New Zealand, and by virtue of being a datacenter and cloud

provider itself, CCL can provide customers with advisory and implementation services to ensure compliance with digital sovereignty considerations on enterprise cloud journeys.

Proprietary IP employed by the vendor in its delivery of CPS includes Cloud Kickstarter (SME market–focused cloud readiness assessment), Foundations Health Check (best practices and architecture review of existing public cloud environment), and enterprise landing zone products for both AWS and Azure. As part of its growth aspirations, the vendor is looking to strengthen its application modernization, hybrid cloud, FinOps, and SMB-focused solutioning and services.

Strengths

- CCL has a particularly strong positioning in its home market (New Zealand) as part of Spark. The vendor also effectively leverages both Spark's channel ecosystem/commercial relationships and delivers joint/embedded services to customers of its sister entities within the Spark Business Group collection of brands.
- The vendor received customer appreciation for the effectiveness of various dimensions of project delivery and a strong customer-centric attitude.

Challenges

- CCL's historic strength as a provider of infrastructure managed services positions it well in the managed cloud services space, but the vendor still has some work to do to increase its share of the CPS business. The integration of Leaven into CCL should help with this.
- Customer feedback indicates the vendor could do better on helping customers expand into new markets/geographies, keep up with peers, and improve employee satisfaction and productivity.

Consider CCL When

Consider CCL when you are a New Zealand–based entity that is looking to partner with an execution-focused local provider of cloud professional and managed services, which has expertise in navigating digital sovereignty considerations in the use of cloud services.

DXC

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

DXC Technology's delivery of CPS draws on its legacy as a provider of managed infrastructure services. Its Cloud Right strategy involves public cloud environments as well as legacy and on-premises IT estates and focuses on optimizing business benefits to be realized from the IT modernization exercise, rather than treating it as a technology transformation exercise. DXC operationalizes its Cloud Right philosophy through its Precision-Guided Modernization framework — a collection of processes, techniques, and tools that spans advisory and insight, acceleration and execution, and operations — to drive optimized decision making and rapid value realization.

DXC's CPS capabilities in the Asia/Pacific region are organized into a collection of specialized Integrated Practices that brings together both sales and delivery capabilities, operating with individual GTM ability. DXC has Integrated Practices for AWS, Microsoft, Google, Oracle, Alibaba, VMware, SAP, Salesforce, ServiceNow, cloud advisory and migration, cloud-native app development, systems integration, and network and security. Execution is orchestrated through resources at the geographic subregion level to customer accounts organized by industry.

DXC's long-standing partnerships with participants in the cloud ecosystem have allowed DXC to develop some unique industry-aligned solutions, such as DXC Assure digital platform on AWS for insurance, Connected Transportation Platform (CTP) (cloud-based ecosystem for intelligent transport systems), DXC SPARK IoT (AWS), and Boost IoT (Azure) for consumer packaged goods (CPG)/retail process optimization, among others.

Strengths

- DXC's highly agile and federated Integrated Practice structure, coupled with its strong local delivery capabilities, allows it to effectively differentiate its CPS. Its Cloud Right approach, supported by robust proprietary assets and capabilities, enables it to address larger and more complex modernization exercises as well.

- DXC demonstrates strength across both infrastructure and application modernization/modern application development. A customer that IDC interacted with rated the vendor highly across multiple dimensions of IT estate modernization.

Challenges

- Although DXC has made significant strides in innovating, strengthening, and streamlining its CPS capabilities over the last few years, there is still work to be done to communicate the Cloud Right value proposition and change the market's perception of DXC as just a competent managed infrastructure services provider.

- Given DXC's large customer base of traditional outsourcing services, a bulk of DXC's current cloud migration activity is understandably re-hosting. However, this also limits its ability to demonstrate innovation and deliver new value to customers.

Consider DXC When

Consider DXC when you are looking to modernize your complex, legacy IT estate, and want to engage with a vendor that can execute at speed while realizing value on an ongoing basis.

HCLTech

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

HCLTech provides a full spectrum of CPS under the HCLTech CloudSMART suite of offerings and services that brings together capabilities from across the vendor's three primary business segments — IT and business services, engineering and R&D services, and products and platforms. HCLTech delivers cloud-enabled digital transformation (DX) through three primary service propositions — innovation-led, sustainability-led, and productivity-led. Clients are introduced to CloudSMART through Smart Way Days, which is HCLTech's initial CloudSMART Consulting engagement and serves as a prelude to other CloudSMART initiatives.

HCLTech's delivery structure has a strong industry alignment, supported by over 100 verticalized industry cloud solutions and more than 3,000 industry use cases. Industry cloud offerings enable businesses to launch new products and expand their reach. HCLTech's industry focus and capabilities have enabled it to serve as a launch partner for several notable industry cloud offerings, such as the IBM FS Cloud, Microsoft Clouds for Healthcare and Retail, and so forth. The vendor also has industry-aligned labs and COEs, such as Fintech Lab, Smart Manufacturing Lab, Industrial Design Lab, and such.

HCLTech has a strong slate of differentiated IP and assets across the breadth of its cloud services coverage. Some significant offerings the vendor leverages in delivery of its CPS include Cloud Bridge (a suite of offerings that supports end-to-end cloud transformation), Automated Technology Modernization Accelerator (ATMA) for automated code conversion support, Kubernetes Migration Platform, and the ADvantage suite (cloud-native code generation, creation of continuous integration/continuous delivery [CI/CD] pipelines, and such).

Strengths

- HCLTech has made significant investments in bolstering presence and delivery capabilities across the breadth of the Asia/Pacific market. This includes not only building an organic presence across multiple locations but also establishing strong partnerships with regional

distributors and channel partners to enhance their market reach and coverage. This strength was acknowledged by HCLTech clients.

- Customers that IDC interacted with commended the vendor's ability to drive operational efficiency, the strength of its marketing message, and ability to help create an effective business.

Challenges

- Over the last several years, HCLTech has consciously and systematically invested in repositioning itself as an enabler of business transformation through digital technologies. (The CloudSMART branding is a good example of this). But there is a scope to further drive this positioning in the market, as is visible in some client feedback.
- Although HCLTech has demonstrated significant capability to innovate for its clients, customer feedback indicates that the vendor can further drive innovation and thought leadership in its client engagements.

Consider HCLTech When

Consider HCLTech when you are looking for a cloud transformation partner with strong local delivery capabilities supported by a robust slate of platforms and tools to drive modernization efficiency and operational automation.

IBM

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

IBM provides CPS from its hybrid cloud service line, and the portfolio spans enterprise cloud strategy, cloud application development and DevOps, cloud modernization, cloud application and data migration, DevSecOps, AIOps, and automation services, and platform engineering services. IBM's application modernization for zSystems offering enables customers to optimize their investments in mainframe systems and modernize them to seamlessly integrate into their multi or hybrid cloud environment.

IBM has hyperscaler practices for AWS, Azure, GCP, and Oracle, in addition to practices for its own offerings — IBM Cloud and Red Hat. IBM delivers CPS, bringing together capabilities from the IBM Technology ecosystem (software, infrastructure) and hyperscaler practices. IBM's CPS delivery is supported by a strong slate of differentiated products and platforms across all the life-cycle stages.

IBM has a strong emphasis on and investment in R&D that is manifested through IBM Research Labs, IBM Consulting's Client Innovation Centers (development and delivery centers), iX (Interactive Experience) Studios, and Security Operation Centers (SOCs). IBM's investment in realizing its ambition as hybrid cloud enabler is visible in ROSA (fully managed IBM Red Hat OpenShift Service on AWS) and the Red Hat OpenShift Service on Azure. Over the last couple of years, IBM has also acquired firms with niche capabilities across data and analytics, telco consulting, product engineering, IIoT, app development observability, and security, among others, to further strengthen its offering portfolio.

Strengths

- With its CPS housed within the hybrid cloud business line and through its hybrid cloud–focused offerings ROSA and Red Hat OpenShift Service on Azure, IBM has positioned itself as a go-to provider for enterprises looking to set up a true hybrid cloud environment.
- Customers that IDC interacted with commended the vendor's ability to help create a more effective business, build/implement hybrid or multicloud environments, and seek client feedback and its strength at the platform-as-a-service (PaaS) layer.

Challenges

- IDC's research suggests that the ability to effectively provide downstream managed cloud services is a key requirement when enterprises evaluate CPS providers. With IBM repositioning itself as a consulting and platforms/solutions provider post the Kyndryl split, it might need to reassure customers looking for a full life-cycle cloud services partner.

- IBM appears to have a perception problem relating to costs — both cost competitiveness and the ability to optimize cloud costs for customers. Customers that IDC interacted with indicated that the vendor could do more to help with cost reduction, cloud-related spend (FinOps capabilities) optimization, providing variable pricing models, and rewarding client loyalty.

Consider IBM When

Consider IBM when you are a large, geographically distributed enterprise with a complex and heterogeneous IT estate and application portfolio that you want to modernize to a hybrid cloud environment.

Infosys

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

Infosys provides its cloud services under the Infosys Cobalt brand, an integrated set of services, solutions, and platforms spanning cloud strategy and advisory, platform engineering, cloud migration and modernization, cloud-native development, data, security, workplace modernization, cloud management, and FinOps capabilities. Infosys Cobalt brings a robust catalog of industry and cloud-first solution blueprints and cloud assets, such as reference architectures, tools, solutions, and platforms — all complying with global, regional, and industry regulatory and security standards — to help enterprises solve their industry-specific business challenges and achieve digital maturity.

Among Infosys' differentiated proprietary assets is its Live Enterprise Application Development (LEAD) Platform that simplifies and accelerates app mod and dev journey. The platform aims to drive hyperautomation with built-in standards and best practices at every stage and spans the complete tech stack and all life-cycle stages for cloud-native development, cloud modernization, database modernization, legacy modernization, and DevSecOps adoption. Infosys also has a rich slate of industry cloud solutions and platforms that it promotes in large transformation deals. Notable examples include Infosys Helix (healthcare and life sciences), Infosys Cobalt FS Cloud (banking, financial services, and insurance [BFSI]), and Infosys Wingspan (education), among others.

Infosys has a structured approach to R&D and innovation that is organized across four groups — researchers are organized into four groups, namely Infosys Center for emerging technologies (iCETS), which is focused on Horizon 3 technologies; Practice Service R&D, which focuses on solutions and accelerators across Horizons 1 and 2; Innovation Hubs; and Partner (hyperscaler and ISV focused) Labs. Over the last few years, Infosys has both meaningfully enhanced its regional delivery capabilities in the region (through its 18 delivery centers across Asia/Pacific) and built strength in product engineering and operational technologies for end-to-end transformation services.

Strengths

- Infosys has a strong enterprise application services business, and its partnerships with a breadth of hyperscalers and infrastructure vendors position it well to execute large packed application modernization exercises.

- Infosys received customer praise for its ability to drive operational efficiency, minimize risk, and execute projects effectively.

- Infosys' Asia/Pacific CPS are concentrated across ANZ and (to a lesser extent) Southeast Asia. The vendor can do more to enhance contribution from other subregions.
- Customer feedback indicates that the vendor could further improve its ability to help reduce costs, drive innovation, and improve the effectiveness of its marketing message.

Consider Infosys When

Consider Infosys when you have a large and complex application portfolio that you want modernized and migrated to cloud and want to engage a vendor with a proven track record in such engagements.

Movate

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

Movate (formerly CSS Corp) is a privately held U.S.-based provider of cloud and IT services to customers in the telecoms, media, and technology (TMT); BFSI; healthcare; retail; and CPG verticals. The vendor provides a full spectrum of CPS spanning consulting and strategy, cloud infrastructure design/build (including app modernization, cloud-native development, and data modernization), and cloud security services. Movate's cloud services delivery for the Asia/Pacific region is driven primarily out of its India delivery centers.

The vendor's CPS portfolio is supported by a robust set of platforms, solutions, and frameworks that includes CloudMAP (automated cloud migration assessment and planning), CloudPath (templates, playbooks, and other migration factory artifacts/assets), FinArch (FinOps tool), and Contelli (intelligent CloudOps and service management), among others. Architect as a service (AaaS) is a unique and interesting offering from Movate that offers customers access to skilled cloud architects on a need basis.

Movate's spectrum of supported hyperscalers and key enterprise application partners includes AWS, Azure, Google, VMware, OpenStack, Salesforce, ServiceNow, Atlassian, and JIRA. The vendor has identified TMT and retail as industry verticals to focus on and is developing packaged cloud-based industry-specific solutions, such as equipping the Movate Edison (cloud-based CX transformation platform) for retail.

Strengths

- Movate offers a wide range of flexible pricing options across the spectrum to engage with clients in a manner they are comfortable in and demonstrates a strong commitment to employee skilling and talent management.
- Movate's AaaS is an interesting offering that has the potential to benefit both the vendor and its customers. It allows potential customers to access a very specific high-value service in a transactional manner while building the vendor's credibility with the customer for further downstream business.

Challenges

- Movate's limited delivery footprint in the Asia/Pacific region outside India presents challenges to its growth potential in the wider regional market.
- IDC's assessment suggests that Movate can further increase the extent of automation employed within its cloud migration and app modernization executions.

Consider Movate When

Consider Movate when you are an India-based enterprise looking for a high-touch, customer-centric transformation partner that offers highly flexible engagement models for discrete cloud migration/modernization initiatives.

NCS

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

NCS, a wholly owned subsidiary of the Singtel group, is a Singapore-based technology services firm providing digital, cloud, cyber, and IT services to clients across the Asia/Pacific region. The vendor has been historically strong across the applications, infrastructure, security, and engineering services offerings within Singapore's defense, homeland security, and public services sectors, and in recent years, expanded its geographic footprint across Asia/Pacific. To offer clients an expanded and reimagined portfolio of innovation-focused services and solutions, and to help them tap into the growing ecosystem of digital technologies, the vendor established NCS NEXT, its digital services arm, whose offerings encompass digital, data, cloud, and platforms. NCS engages clients through its three strategic business groups (SBGs) — Gov+ (public service, defense, and homeland security), Enterprise (healthcare and transport, financial, industrial, and commercial), and Telco+ — and offers them end-to-end services through 58 specializations. The vendor has established a cloud community of practice (CoP) to "infuse" cloud competencies into all specializations.

As part of its cloud services portfolio, NCS provides a full spectrum of services across strategy, advisory and design, and FinOps; design and build; implementation services, migration services; AI-led innovation services; and managed services. The vendor also provides comprehensive competency coverage across AWS, Microsoft Azure, GCP, RedHat, and VMware, allowing it to effectively address clients' multi and hybrid cloud requirements. With its heritage servicing public sector entities and enterprises in regulated industries (healthcare and banks) in Singapore, NCS has created reference models for these entities and industries across AWS, Azure, and GCP and operationalized these reference models in several public sector and commercial sovereign clouds.

NCS has a meaningful Greater China presence with robust delivery capabilities across Alibaba Cloud, Huawei Cloud, and GCP, and supports both China-based customer requirements with these cloud environments and provides single pane of glass multicloud management across both China and Western cloud stacks (including AWS and Azure) for clients with such needs. The vendor has significantly strengthened its Australia presence over the last two years through several acquisitions — Riley (GCP capabilities), Eighty20 (Microsoft SaaS and Azure), ARQ (digital tech consultancy with Azure and AWS capabilities), and Dialog (Azure and AWS capabilities).

Strengths

- With strengths across a wide spectrum of cloud platforms and environments, NCS is well positioned to support clients' multi and hybrid cloud strategies while meeting necessary compliance requirements.
- Clients that IDC interacted with rated the vendor highly for its ability to provide a full spectrum of CPS, build/implement hybrid, or multicloud environments, and implement a strong cloud governance model.

Challenges

- NCS can further accelerate the development of proprietary platforms and tools to standardize, automate, and accelerate the delivery of its cloud services.
- Clients that IDC interacted with identified industry insights and competence, ability to manage staff turnover, and capabilities at the application layer as areas the vendor could improve further.

Consider NCS When

Consider NCS when you need expertise across a diversity of on-premises and hyperscaler cloud environments to support a multi or hybrid cloud strategy or want to engage with a vendor that brings

significant cloud experience servicing public sector entities, enterprises in regulated industries, or digital sovereignty requirements.

PwC

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

PwC provides a full range of cloud and digital consulting services across advisory, design, build, implement, and operate, across industry verticals and hyperscaler platforms. PwC's CPS business is organized by GTM, solutioning, and delivery functions, and has practices by hyperscalers (AWS, Azure, GCP), Ali Cloud (in some markets), data analytics and AI, and engineering.

PwC's GTM motion is anchored in the industry verticals the vendor services, and cloud services delivery is governed by the notion of "sector expertise + scaled engineering." The operationalization of the philosophy simplifies pursuit engagement through creation of differentiated sector-based offerings and bringing standardization to cloud deals and pursuit teams. PwC's industry-led approach is also evident in its industry cloud offerings — prebuilt, industry-specific solutions that connect PwC products, third-party industry apps, and cloud services providers through the vendor's proprietary x-industry platform. PwC has built a portfolio of over 150 solutions across the 11 sectors it services.

Other significant assets that PwC leverages as part of its cloud services delivery include Digital Fit For Growth (FFG) (a tool to analyze program drivers and associated risks and assist in business decision making), Cloud Advancer (a solution for enterprise cloud strategy), Cloud Intelligence (cloud-native integration and journey orchestration solution), Cloud Placement Organizer, and Hardened Cloud Digital Accelerator (compliance check automation, drift detection, and incident response management), among others. Over the last few years, the vendor has made specific acquisitions in the region to further strengthen its enterprise application customization, cloud integration, data-driven insights, and security and risk management capabilities.

Strengths

- PwC brings a strong industry-aligned, business outcome focus to its cloud transformation engagements.
- Customers that IDC interacted with commended the vendor's ability to deliver innovation, help comply with new/existing regulations, and support projects with local presence, and generally felt that they got good value for the fee paid.

Challenges

- Although PwC has managed cloud services capabilities, it is a small part of the vendor's overall cloud services portfolio. Enterprises that desire end-to-end cloud life-cycle services that include extensive day 2 support will need to evaluate if the vendor's profile fits their needs.
- Customers that IDC interacted with indicated some room for improvement in applying proven cloud methodologies, helping improve business agility; and integrating the project team with client teams.

Consider PwC When

Consider PwC when you want a strong business transformation partner that operates with an industry lens and can provide robust compliance, risk management, and security services as part of its cloud services.

Samsung SDS

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

Samsung SDS is a Korea-based cloud and IT services provider and a part of the Samsung conglomerate. Samsung SDS positions itself as a complete provider of cloud solutions and services spanning cloud platform services (Samsung Cloud Platform), managed cloud services, and software solutions (Samsung Enterprise SaaS). It delivers CPS as part of its broader managed cloud services charter.

Samsung SDS' portfolio of CPS spans consulting services (transformation planning, readiness assessment, architecture planning, and road map creation) and implementation/migration services across the breadth of cloud migration paths. In addition to the Samsung Cloud Platform (which the vendor offers to service private, dedicated, sovereign, and industry cloud requirements), the vendor has capabilities across AWS, Azure, GCP, OCI, Alibaba, Tencent, VMware, and Naver Cloud Platform (a Korea cloud platform with coverage across Southeast Asia).

Samsung SDS' cloud services are supported by a few key platforms and tools to help with readiness assessment, migration planning, architecture planning, and masterplan creation; automation and acceleration of a host of migration activities; and infrastructure security diagnosis.

The vendor's delivery organization for cloud consulting services is organized by cloud platform and for migration/implementation services by both cloud platform and industry. The vendor has regional delivery centers in Greater China, India, and Vietnam to support the core of its technical capabilities that reside in its Korea centers.

Strengths

- Samsung SDS offers a compelling integrated cloud value proposition across multiple cloud platforms; professional, managed and security services; and proprietary enterprise SaaS applications.
- Customers that IDC interacted with commended the vendor for its service delivery effectiveness and its ability to build/implement edge-to-cloud solutions (with data sensing/collection at the edge of a network).

Challenges

- Although Samsung SDS is well positioned for technology-led cloud migration and modernization exercises, it can work to further improve its positioning as an enabler of business transformation through technology.
- Samsung SDS has invested in developing proprietary assets to accelerate and automate cloud migration, but it can look to further increase the extent of automation in its delivery.

Consider Samsung SDS When

Consider Samsung SDS when you are looking for a vendor that can bring together diverse expertise across multiple cloud environments (public and private), security, IoT/edge, industry-specific solutions, and such, to realize complex use cases.

Tata Communications

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

Tata Communications Limited (referred to as Tata Communications in this profile) is an India-based global provider of internet and telecommunications connectivity solutions and services and part of the diversified Tata Group conglomerate. Tata Communications has a rich legacy of managed infrastructure (and has been strengthening its security services capabilities) and provides cloud services with the intent of delivering trusted and compliant cloud environments for its clients.

Tata Communications' CPS portfolio includes assessment, migration, and modernization services across AWS, Microsoft, and private environments. The vendor's GCP partnership is more recent. Of

note is the vendor's IZO Private Cloud offering built atop VMware, which allows it to provide some differentiated offerings, such as the SAP HANA grid on IZO Cloud in which customers can host the SAP application on IZO private cloud and choose from among a diverse hosting configuration for the HANA DB. Another use case is the S3-compliant IZO Cloud Storage for backup and archival. The vendor also provides IZO Financial Cloud (BFSI-focused community cloud) and Government Community Cloud (for public sector entities in India).

Tata Communications' CPS business is skewed toward government and large enterprises, for whom it assigns dedicated technical account managers (TAMs) to ensure their specific needs are met. The vendor has separate service delivery teams for hyperscalers and its own cloud services, resourcing for both of which is done from its Global Service Management Center in India. Although the vendor's footprint in the small and medium-sized business (SMB) segment is relatively small, it is looking to expand its base in the digital-native and FinTech space.

Strengths

- Tata Communications' IZO Cloud portfolio allows it to offer a diversity of infrastructure and platform services models, including managed hosting, public and private cloud, community cloud and end-to-end managed services, and connectivity to multiple public clouds.
- Tata Communications' customers that IDC interacted with expressed satisfaction with the vendor's ability to ensure compliance with existing/new regulations, mitigate risks, and deliver good value for the fee paid.

Challenges

- Tata Communications' value propositions revolve around infrastructure and platform focused cloud-migration and security/compliance use cases, and it needs to further strengthen its application modernization capabilities. This is reflected in customer feedback as well. Its reliance on partners to service cloud-native application development requirements represents a gap in its cloud services portfolio.
- Customers that IDC interacted with indicated that the vendor needs to improve its ability to drive innovation and business outcomes (business growth, market/geo expansion, and so forth) through its cloud offerings. Customers also indicated that there was room for improvement in industry vertical-focused solutions and services.

Consider Tata Communications When

Consider Tata Communications when you have specific needs for secure and compliant cloud environments or need a vendor that has experience in deploying multicloud environments and optimizing connectivity between different parts of your IT estate as you progress along your cloud journey.

TCS

According to IDC analysis and buyer perception, Tata Consultancy Services Limited (TCS) is positioned in the Leaders category in this 2023–2024 IDC MarketScape for Asia/Pacific CPS.

TCS' CPS is a key vehicle to operationalize the vendor's Business 4.0 enterprise transformation framework, and the service units consist of Global Consulting Practice, AI.Cloud, Cyber Security, Cognitive Business Operations, and others. Premised on the vision of "Purpose Driven Borderless Enterprise," TCS aims to help clients in their cloud journeys as they navigate through three stages of transformation — establishing a digital core, innovating business models, and growing through purpose-led ecosystems.

TCS has a comprehensive portfolio of IP and assets that it leverages in the delivery of its CPS. TCS has hybrid and multicloud enablement frameworks, which can be employed as transformation simulators to help enterprises visualize the end-state of their cloud transformation journey. These frameworks bring to bear a diverse collection of more than 15 purpose-specific TCS proprietary

solutions and tools, such as MasterCraft TransformPlus (app dev and modernization platform), Cloud Mason (landing zone creation), and DAEzMO (data estate modernization), among others. These technology enablers effectively complement the deep in-house vertical-specific subject matter expertise and well-regarded industry-specific offerings, such as TCS BaNCS (core banking), TCS Optumera (retail intelligence platform), and TCS Aviana (aviation operations), to help contextualize the clients' cloud journeys to their specific requirements.

TCS has strong technical capabilities and deep partnerships across key players in the cloud ecosystem, with hyperscaler-specific practices (AWS, Azure, Google Cloud) and ISV-focused COEs (Oracle, SAP, Salesforce, and ServiceNow, among others). Through TCS Enterprise Cloud — powered by TCS Alpha — the vendor also provides customers with a managed hybrid cloud offering that currently has 26 availability zones globally (seven in Asia/Pacific), supported by TCS' full suite of cloud services. The offering allows customers to shape their hybrid cloud strategy while consuming TCS' vertical platforms and solutions in a private cloud environment as necessitated by regulatory, compliance, or other requirements.

Strengths

- TCS has strong delivery capabilities, and the ability to orchestrate the availability of necessary resources and capability sets for complex transformation projects.
- Customers also commended the vendor for the diversity of its pricing model options, delivering value for fees paid, optimizing resource mix for project delivery, and actively seeking and acting on customer feedback.

Challenges

- TCS has, in recent years, made significant investments in R&D and innovation — PACE ports, co-innovation networks (COIN), Cloud Garages, and so forth. However, these are yet to be translated fully into thought leadership, which is reflected in customer feedback as well.
- Customers that IDC interacted with opined that the vendor could improve various dimensions of its market messaging.

Consider TCS When

Consider TCS when you are looking for a customer-centric and flexible enterprise transformation partner with proven delivery capabilities, which can bring together deep vertical-specific know-how and assets and strong multicloud transformation expertise.

Tech Mahindra

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

Tech Mahindra, referred to as TechM in the remainder of this profile, is a global provider of IT and engineering services and part of India's Mahindra Group conglomerate that has business interests spanning a wide breadth of industry verticals. Through its integrated cloud approach, TechM aims to support customers' cloud-enabled transformation journey across three horizons — operational (lift and optimize), innovative (cloud-native and horizontal), and transformational (vertical cloud). TechM delivers its integrated cloud services through what it terms "5 Big Bets" — cloud infra services, app modernization, packaged enterprise resource planning (ERP) on cloud, data and AI and security on cloud, and industry vertical cloud and business process as a service (BPaaS).

At the heart of TechM's cloud transformation aspirations is its Cloud BlazeTech platform that provides a consolidated view of all its cloud solutions and service catalogs, simplifies orchestration and cloud operations across multi and hybrid cloud environments, and enables FinOps capabilities for usage optimization. The Cloud BlazeTech platform spans advisory, migrate/modernize, platform engineering, and operations/optimization phases to provide coverage across the full life cycle of cloud services.

TechM's cloud services portfolio includes a host of useful frameworks and tools to simplify and accelerate clients' cloud journeys. Notable ones include PassportNXT (Business value and assessment framework), FinOptima (FinOps), GAiA 3.0 (AIOps), Factory.NXT (5G enterprise solution for manufacturing), and BlueMarble (DX accelerator for Telco BSS functions).

Over the years, TechM has built a robust Customer Advisory Board (CAB), with over 50 participating CXOs globally, which it leverages to drive customer engagement, develop thought leadership, and support its cloud strategy formulation.

The assessment in this document for TechM is based on publicly available data and information obtained via desk research, company briefings, collateral supplied by the vendor, IDC proprietary data, and analyst insights.

Strengths

- Among TechM's strengths are its strong engineering credentials and its ability to provide cost-competitive CPS.
- TechM has a robust stable of industry cloud solutions and business apps on various hyperscaler platforms, helping it effectively parlay its strength in specific industry verticals into the cloud realm.

Challenges

- Although TechM's engineering capabilities are well regarded, there is still work to be done for the vendor to better establish itself in CPS. The unveiling of the Cloud BlazeTech platform should help with this.
- TechM has a relatively greater proportion of project delivery executed from its global delivery locations, increasing delivery complexity a bit.

Consider Tech Mahindra When

Consider TechM when you are looking for an engineering-focused and value-conscious approach to cloud migration and application modernization.

Telstra Purple

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

Telstra Purple is the DX services delivery arm of Telstra and provides a rich suite of cloud services through its 4D cloud adoption framework — Discover (cloud strategy, readiness assessment, and business case development), Define (architecture and planning), Deliver (remediation, cloud foundation, migration, transformation, and cloud native), and Drive (managed services and optimization).

The vendor has strong partnerships with AWS and Microsoft (Telstra has a 360-degree relationship with Microsoft) and has created cloud hyperscaler-aligned practices for both hyperscalers. These practices are run as independent profit and loss units, with dedicated delivery, operations, and sales support personnel. The practices draw on geographically grouped squads of cross-skilled resources for project delivery. Telstra Purple also has robust VMware capabilities to service customer requirements for hybrid cloud and VMware on public cloud (VMC on AWS and Azure VMware Solution). The vendor has a strong delivery footprint across Australia and is strengthening its delivery presence in Singapore and Philippines to capture opportunities across the broader Southeast Asia market.

Telstra's Sovereign Cloud capability allows it to create end-to-end sovereign cloud environments, including network connections and gateways to sovereign public clouds. The Telstra Cloud Compliance solution helps customers see a complete picture of their cloud estate's security and compliance posture, detect misconfigurations and model, actively enforce security policies, and protect against attacks and insider threats; and provides cloud security intelligence for cloud intrusion detection. Telstra Purple has a Cloud Centre of Excellence, which brings together representatives across sales, delivery, and strategy in professional and managed services to identify and build reusable solutions.

Strengths

- Telstra Purple is well positioned to leverage Telstra's position as a provider of network and communication services in the Australia market, allowing it to engage with Telstra's robust client base for cloud transformation services. This is particularly relevant as it seeks to capture new opportunities in the 5G and edge spaces, and solutions around edge compute, Azure IoT, and "Just Walk Out" (AWS-based retail solution to eliminate "checkout") are testament to these efforts.

Challenges

- Telstra Purple needs to strengthen its capabilities in cloud-native application development so it can more effectively capture the market for cloud-enabled innovation.
- The vendor's CPS footprint outside Australia is quite limited and it can do more to leverage the strength of the Telstra brand and expand its footprint in the Southeast Asia market.

Consider Telstra Purple When

Consider Telstra Purple when you are a large Australia-based organization that is looking to embark on its cloud journey with AWS or Microsoft Azure. Telstra Purple is also a good partner if you are an existing Telstra customer and are interested in leveraging the full power of the Telstra ecosystem.

Wipro

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

By bringing together all its cloud-related services, capabilities, platforms, and assets — including domain-specific ones — into the Full Stride cloud services business line, Wipro has aligned its GTM motion with its engineering execution and service delivery organization. The Full Stride business line comprises two service lines, the Wipro Digital and Cloud (cloud and domain consulting and application modernization) and Cloud Infrastructure Services (infrastructure modernization and optimization) supported by hyperscaler-focused business groups for AWS, Azure, and GCP. This unified organizational and operational structure helps Wipro effectively position itself as a true partner for cloud-enabled enterprise transformation.

Wipro's delivery of CPS is supported by a host of differentiated technology platforms and business solutions. A notable example is the Wipro Full Stride Cloud Studio — an integrated platform (also operationalized in physical locations around the world) that provides a single pane of glass for cloud discovery, assessment, and migration planning, automation, and management. The Cloud Studio also incorporates a diverse set of complex multi and hybrid cloud use cases that help accelerate cloud transformation and modernization journeys. Wipro's strength of industry and domain expertise is captured in its vertical-specific cloud solutions, such as the Telco Cloud 5G Stack, Industry 4.0, Medicare 360, and Bank in a Box, among others.

Over the last few years, Wipro has also made strategic acquisitions to strengthen its domain and technology capabilities in specific areas. Significant examples include Rizing (SAP Cloud Consultant) and Capco (BFSI-focused technology consultant), which meaningfully strengthen Wipro's CPS capabilities to complement its traditional strength in infrastructure services.

Strengths

- Wipro's concerted efforts to strengthen its CPS capabilities — alignment through the Full Stride business line, investments in developing a rich ecosystem of labs, platforms and tools, and well-considered acquisitions — have helped it build a compelling offering set.
- Customers that IDC interacted with acknowledged the vendor's flexibility in contracting, minimizing administrative cost for vendor management, and delivering improved operational efficiency.

Challenges

- Although Wipro has a strong pedigree in infrastructure services and its cloud innovation capabilities are evidenced through its industry-specific cloud platforms, it still has some work to do to change market perception of its innovation capabilities and projection of thought leadership in CPS. This is reflected in IDC's customer interactions as well.
- Customers that IDC interacted with indicated that the vendor could do better on some operational parameters, specifically relating to leveraging talent efficiently, managing staff turnover during projects, and optimization of the onsite/offshore effort in project delivery.

Consider Wipro When

Consider Wipro when you are looking for a collaborative, long-term partner for your cloud transformation journey that is configured — both organizationally and in terms of integrated tooling — to engage effectively with you from the initial assessment and advisory to ongoing cloud operations management and optimization.

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.

Strategies and Capabilities Criteria

Tables 1 and 2 indicate each criterion and scoring element evaluated alongside a definition for strategies and capabilities, respectively. IDC believes that CPS providers in Asia/Pacific need to exhibit characteristics identified in the tables to be successful when crafting their regional growth and expansion strategy, and in leveraging existing capabilities to their advantage. The factors were weighted because IDC believes that some factors are more important than others in maximizing market opportunity and realizing market success.

TABLE 1

Key Strategy Measures for Success: Asia/Pacific Cloud Professional Services 2023–2024

Criteria	Definition	Weight (%)
Delivery	Customer perception of effectiveness of various elements of project/service delivery strategy in action	8
Functionality or offering strategy	Vendor's plans for evolving its CPS and associated platforms, assessed against their current ability	18
	Clients' perceptions about the prospects for vendor's CPS offerings across the infra, platform, and apps layers	
Pricing model	Assessment of pricing models and options put in place by the vendor, their usage by customers, and strategies to add new models based on market trends and customer needs	10
Growth	The vendor has clearly articulated/demonstrated growth strategy and plans across various industry verticals.	31
	The vendor has clearly articulated/demonstrated growth strategy and plans across various Asia/Pacific subregions.	
	The vendor has clearly articulated/demonstrated growth strategy and plans for various hyperscalers and cloud platforms.	
	The vendor uses mergers and acquisitions (M&A) effectively to strengthen its growth prospects across geo/vertical/ cloud services capability areas.	
Marketing strategy	Customers are clear about the vendor's marketing message and acknowledge its relevance to their needs.	15
	CPS offerings are showcased prominently, and value proposition is articulated clearly in the vendor's corporate website.	
Talent	The vendor's strategy to enhance its workforce's skill and relevance through a combination of re-skilling, upskilling, and external recruitment.	10
Innovation	Customer feedback validates the vendor's business, technology, and service innovation strategy, and customers recognize the vendor's thought leadership in CPS.	8
Total		100

Source: IDC, 2023

TABLE 2

Key Capability Measures for Success: Asia/Pacific Cloud Professional Services 2023-24

Criteria	Definition	Weight (%)
Functionality or offering	Assessment of the breadth of a vendor's CPS portfolio and cloud platform coverage	21
	Customer feedback on a breadth of essential delivery capabilities and expertise across the CPS spectrum	
	Analyst assessment of a vendor's breadth of support across various cloud platforms based on competencies acquired, advanced qualifications, and certified resources	
	Analyst assessment of various platforms and differentiated IP developed by the vendor to improve and optimize its delivery of CPS engagements	
Delivery model appropriateness and execution	The vendor has demonstrable regional delivery presence and strength, reflected in the revenue contribution of different Asia/Pac subregions to the vendor's overall CPS business in the region.	17
	Customers perceive that the vendor has a robust CPS delivery model and can execute project deliveries effectively.	
	Analyst assessment of how effectively a vendor can leverage automation in the delivery of CPS across the breadth of cloud migration and modernization activities	
Portfolio benefits	The vendor can deliver benefits across a broad spectrum of cloud-centric deployment scenarios.	12
	The vendor can effectively support customers across the breadth of cloud-centric app modernization paths.	
	Customers' perception of business benefits is realized across various dimensions of value.	
Pricing model or structure of product/offering	Customer satisfaction with pricing model, pricing flexibility, and cost management	4
Sales/distribution-structure, capabilities	Analyst evaluation of the size of the firm's sales professionals dedicated to selling CPS relative to its full-time CPS delivery resources	6
Customer service delivery	Customer feedback on vendors' effectiveness and timeliness of feedback collection mechanism, feedback incorporation	4
Customer satisfaction	Customers' overall satisfaction with services received and their assessment of the vendor rewarding client loyalty	6
Growth strategy execution	Analyst assessment of the relative growth of the vendor's CPS business, adjusted for current size of the business	14
	Analyst assessment of the improvement in a vendor's project and client metrics on a year-over-year (YoY) basis	

TABLE 2

Key Capability Measures for Success: Asia/Pacific Cloud Professional Services 2023-24

Criteria	Definition	Weight (%)
Innovation/R&D productivity and pace	Analyst assessment of a vendor's dedicated innovation/research capacity as measured by their investment in research/innovation facilities, full-time researchers dedicated to CPS, and dedicated joint R&D efforts with technology partners	7
Range of services	Customer feedback on the vendor's ability to support CPS requirements across diverse deployment scenarios	9
	Analyst assessment of the balance of overall cloud life-cycle services portfolio, spanning both professional and managed services, indicating vendor's ability to effectively support clients end to end	
Total		100

Source: IDC, 2023

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 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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