IDC MarketScape

IDC MarketScape: Asia/Pacific Professional and Managed Services for Microsoft Azure 2025 Vendor Assessment
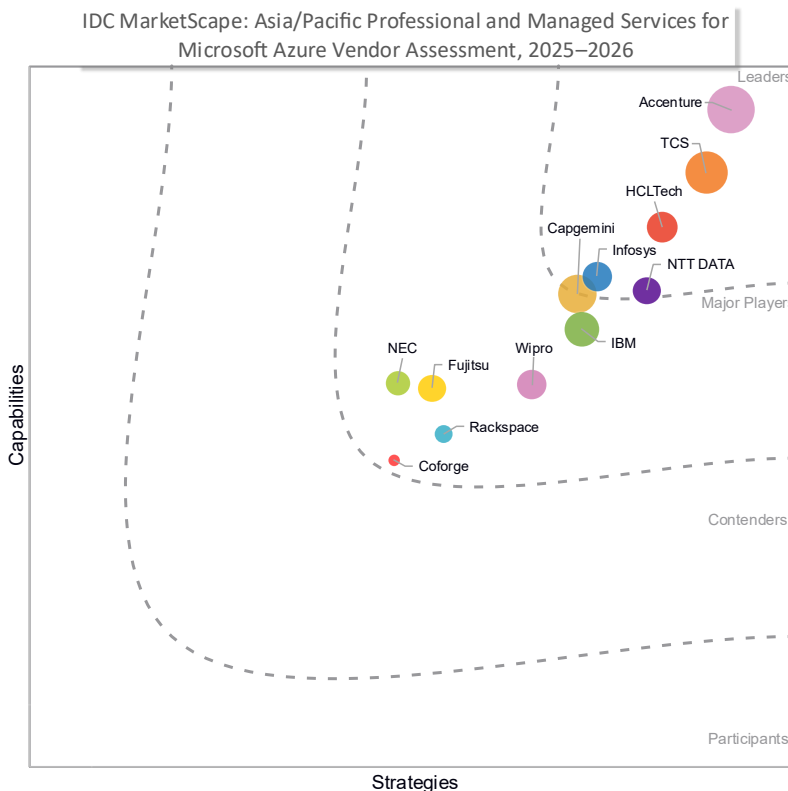
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THIS MARKETSCAPE EXCERPT FEATURES ACCENTURE

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Asia/Pacific Professional and Managed Services for Microsoft Azure Vendor Assessment

IDC MarketScape: Asia/Pacific Professional and Managed Services for Microsoft Azure Vendor Assessment, 2025−2026

Source: IDC, 2025

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

IN THIS EXCERPT

The context for this excerpt was taken directly from IDC MarketScape: Asia/Pacific Professional and Managed Services for Microsoft Azure 2025 Vendor Assessment (Doc #AP53581325).

IDC OPINION

Using the IDC MarketScape model, IDC assessed 12 external professional IT services vendors that provide professional and managed services for Microsoft Azure. With cloud now firmly established at the foundation of enterprise IT architecture as a key enabler of enterprise innovation, agility, resilience, and scale, IDC notes significant activity among service providers offering professional and managed services for and across different cloud environments, including for Microsoft Azure. Some aspects of the Microsoft Azure services market, such as migrating to cloud infrastructure and application instance consolidation, implementation and management of Microsoft's enterprise business applications and workplace offerings portfolio have matured, whereas other aspects, such as legacy modernization, microservices architecture, integration of cloud-native services and capabilities, addressing emerging requirements around digital sovereignty and generative AI (GenAI) adoption, enablement of seamless multi and hybrid cloud environments, support for enterprise requirements around digital sovereignty, green operations (GreenOps), and advanced security services are growing increasingly popular.

IDC's assessment of aggregated customer feedback as part of this study suggests that vendors generally executed well on the following:

- Comply with existing or new regulations
- Help modernize/manage/optimize enterprise data ecosystem on Azure
- Provide an appropriate and high-quality team for the project
- Support digital sovereignty-related requirements on Azure

In contrast, average customer feedback was lowest in the following parameters:

- Reduce costs (including admin/vendor management costs) for customers
- Reward client loyalty
- Offer customers flexibility through various pricing models and options
- Help customers expand into new markets/geographies

Finally, significant variability was observed in the feedback collected across vendors. IDC believes these are areas in which vendors can clearly showcase their capabilities in the market, including:

- Reward client loyalty
- Represent client requirements/concerns to the hyperscaler (Microsoft Azure)

- Help customers expand into new markets/geographies
- Identify and implement options for growth

A range of approaches were observed in vendors' relative focus and volume of execution across application modernization tactics (e.g., rehost/replatform versus re-architect/cloud-native development, and so forth), Marketplace presence and associated business impact, workload types and ISV-specific expertise, and application modernization to Azure project mix (project-oriented versus managed services) and composition (including consulting and modernization advisory services), among others.

Finally, there was also significant variance in vendors' regional presence and delivery capabilities across different Asia/Pacific subregions and industry vertical focus. 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 assess suitability for their specific requirements to identify the partner equipped to help them achieve their cloud operations management objectives.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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

- Possession of a wide variety of end-to-end service delivery capabilities, including professional and/or managed services for Microsoft Azure
- A minimum of US$5 million Asia/Pacific revenue generated from the delivery of professional and/or managed services for Microsoft Azure in CY2024
- Delivery capabilities and customers in at least two Asia/Pacific subregions among Australia/New Zealand (ANZ), Greater China, Southeast Asia, South Korea, India, and Japan

ADVICE FOR TECHNOLOGY BUYERS

Based on this study, IDC offers the following recommendations to buyers looking for professional and managed services for Microsoft Azure to support their key business and technology objectives:

- **Demand proven experience in Azure security, compliance, and sovereignty.** With increasing regional and industry-specific compliance requirements in Asia/Pacific, seek Azure partners that have demonstrated ability to deploy and manage sovereign cloud solutions and understand local regulatory frameworks — beyond generic security credentials.
- **Emphasize end-to-end transformation and strong ecosystem partnerships.** Seek Azure services providers that work closely with both

Microsoft and broader ecosystems (ISVs, consulting partners, systems integrators) to avoid vendor lock-in and drive business-aligned outcomes through co-creation and integrated service delivery.

- **Prioritize hybrid and multicloud capabilities.** About 75% of organizations surveyed in the IDC's *2025 Asia/Pacific IT and Business Services Sourcing Survey* indicated that they have meaningful workloads on more than one public cloud, and 58% operated in a hybrid cloud model, highlighting the need for providers with robust hybrid and multicloud integration expertise to enable flexibility and future-proof infrastructure decisions.

- **Target critical skills and delivery capacity.** Data from the IDC's *2025 Asia/Pacific IT and Business Services Sourcing Survey* reveals that 40.7% of Asia/Pacific enterprises struggle to source the necessary skills to maximize their cloud investments. Enterprises should prioritize partners with proven talent pipelines and delivery capacity, supported by local and regional expertise to mitigate risk and ensure efficient delivery.

- **Use this evaluation in your vendor selection process.** Use this IDC MarketScape as a tool not only to short list vendors for cloud professional services 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.

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 the 2025 IDC MarketScape for Asia/Pacific professional and managed services for Microsoft Azure vendor assessment.

Accenture is a global professional services company with expertise in digital, cloud, and security transformation, and a robust footprint in the Asia/Pacific region. The company leverages its extensive history and scale, servicing its Azure engagements from 22 regional centers across Asia/Pacific, including ANZ, China, Southeast Asia, India, and Japan. Accenture's local delivery presence is supported by a network of strategic acquisitions — such as Aristal in Malaysia, CLIMB in Japan, and Total eBiz Solutions in Singapore — which have strengthened capabilities in industry-specific cloud modernization, financial services, digital workplace transformation, and AI-

enabled solutions. Additionally, its joint venture with Microsoft and Avanade enhances Accenture's ability to serve midmarket clients with tailored digital and cloud offerings, complementing its enterprise-scale reach.

Accenture's Azure capabilities are managed via the Accenture Microsoft Business Group (AMBG), which delivers a comprehensive set of professional and managed services covering strategy, migration, modernization, app development, data/AI, and ongoing operations. High-value services within Asia/Pacific include industry-specific solutions for financial services, manufacturing, telecom, multimodal AI and GenAI integration, large-scale application modernization, and cloud-native development. Many of these solutions have been co-designed with Microsoft, leveraging strong joint research and development (R&D) and product engineering relationships. Accenture has also developed proprietary assets in collaboration with Microsoft, such as AI Refinery (AI/ML orchestration), MyNav (cloud transformation simulation), GenWizard (an enterprise-grade GenAI platform), and the Avanade Management Platform (AMP), designed for secure and scalable management of multicloud and hybrid environments.

A distinguishing attribute of Accenture in Asia/Pacific is its focus on local innovation, as evidenced by a network of Azure-centric innovation hubs in Singapore, Australia, Japan, India, and China. These centers serve as venues for client co-creation and industry-specific digital reinvention (e.g., GenAI studios and manufacturing data platforms). Accenture executes its delivery through a blend of onsite, domestic, offshore, and nearshore models, ensuring flexibility and proximity for clients. IDC's interactions with multiple customers suggest that the vendor is viewed as a strategic partner for large-scale digital transformation (DX) projects throughout the region.

Strengths

- **Deep industry and AI capabilities.** Accenture offers advanced Azure-native solutions for data modernization, GenAI adoption, and industry-specific transformation (e.g., financial services, manufacturing, and telecommunications), enabled by proprietary frameworks, such as AI Refinery. Its joint investment with Microsoft in agentic AI and large language models (LLMs) gives clients early access to transformative innovations.

- **Dedicated local presence and talent.** Accenture's regional centers and recent acquisitions bolster the ability to deliver specialized, regulated, or sovereign cloud projects. The company's Asia/Pacific–specific innovation hubs ensure that solutions are tailored to regional needs, regulations, and business cultures.

- **Operational scale and maturity.** Customer reference data indicates Accenture's capacity to handle highly complex and large-scale Azure projects. Maturity in outcome-based managed services, a high degree of automation in both service delivery and operations, and business value realization are noted positively by reference clients.

Challenges

- ▪ **Change management satisfaction.** Although customer feedback on technical execution is generally very robust, some customers IDC interacted with indicated that change management and talent management during Azure engagements are not always consistent. Some clients also expressed the need for greater support in organizational transformation and skills enablement.

- ▪ **Project visibility and value realization.** Because of the breadth and complexity of Accenture's engagements, clients occasionally report challenges in tracking incremental value from transformation investments.

Consider Accenture When

Consider Accenture when seeking a partner for large, complex Azure programs that demand strong industry expertise, regional presence, and

advanced AI/cloud capabilities — particularly for transformation agendas in which innovation, security, and co-developed Microsoft solutions are critical. Their scale and innovation hubs make them appropriate for customers who value competence in technology integration and transformation for impact.

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 market share of each individual vendor within the specific market segment being assessed.

This IDC MarketScape exercise is the result of a detailed vendor assessment with information gathered from vendor responses to IDC's request for information (RFI) questionnaire, vendor briefings and sharing sessions, customer references, and IDC's internal research on the subject.

Although the 12 vendors evaluated and profiled in this report are important participants in the Asia/Pacific professional and managed services for Microsoft Azure market, the list is not exhaustive, and there are other significant vendors in the region that might merit consideration based on your specific needs.

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, behaviors, and capabilities.

Market Definition

Professional and Managed Services for Microsoft Azure

The Microsoft Azure Services Ecosystem encompasses partner-delivered technical and business services that help organizations plan, build, migrate, optimize, secure, and manage their cloud environments on Microsoft Azure. It is designed to accelerate DX, drive innovation, and deliver ongoing operational excellence for enterprises of all sizes.

Professional services include cloud strategy and advisory, architecture and design, application development, migration, modernization, integration, and data/AI solutions, often tailored to industry-specific needs. Partners provide expert guidance and hands-on execution to successfully move workloads, develop cloud-native applications, and enable new business capabilities.

Managed services cover continuous operations, monitoring, application and infrastructure management, cost optimization, security, compliance, governance, and support. Partners take responsibility for operational health and performance, using automation and advanced tooling, allowing customers to focus on their core business.

Market Segmentation

Azure Consulting and Advisory Services

- Cloud strategy, readiness assessment, architecture planning, and migration road maps
- Business case development, technical workshops, proof of concept, and cost modeling

Cloud Migration and Modernization

- Migrating applications, data, and infrastructure from on premises or other clouds to Azure
- Application re-platforming, refactoring, and modernization (including containers, microservices)
- Data estate modernization, including SQL, NoSQL, and analytics solutions

Application Development and Integration

- Cloud-native app development, DevOps enablement, application programming interface (API) management, and integration with Azure services
- Deployment of business applications (Dynamics 365, Power Platform), custom solutions, and industry apps

Managed Azure Services

- Day-to-day cloud operations: monitoring, patching, backup, and disaster recovery
- Cost and resource optimization: compliance reporting, automation of operational tasks
- Security management: identity, access, threat detection, and managed security operations center (SOC) as a service

Data, AI, and Advanced Workloads

- AI/ML models built on Azure AI, Power BI analytics implementations, and Internet of Things (IoT) solutions
- GenAI integration, Copilot deployments, and intelligent automation
- Industry-specific AI solutions leveraging Azure ML, cognitive services, and data lake

Security, Compliance, and Governance

- Comprehensive cloud security services, compliance assessments, IAM
- Cybersecurity frameworks, zero trust, and regulatory compliance (General Data Protection Regulation [GDPR], Health Insurance Portability and Accountability Act [HIPAA], and so forth)

Related Research

- *Asia/Pacific Enterprise Cloud Architecture Preferences and Infrastructure Modernization Priorities, 2025* (IDC #AP52896925, September 2025)
- *Exploring the Role of External IT Services Providers in the Enterprise Agentic AI Journey in Asia/Pacific* (IDC #AP52292825, June 2025)
- *IDC Asia/Pacific Public Cloud Repatriation Perspectives, Trends, and Challenges 2025: Implications for Digital Infrastructure Providers* (IDC #AP52209725, June 2025)
- *Managed and Multicloud Services in Australia: Adoption Trends, Spend Intentions, and Preferences* (IDC #AP52292525, March 2025)
- *What Do Australia Enterprises Perceive as the Greatest Strengths of Different Public Cloud Providers?* (IDC #AP52896825, February 2025)

Synopsis

This IDC study represents a vendor assessment of providers offering professional and managed services for Microsoft Azure in the Asia/Pacific market through the IDC MarketScape model. The assessment reviews both quantitative and qualitative characteristics that define current market demands and expected buyer needs for application modernization services. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria. The framework highlights the key factors that are expected to be the most significant for achieving success in the application modernization services market, both in the short and long term.

"Across the Asia/Pacific region, Microsoft Azure continues to gain traction as enterprises prioritize modernization, resiliency, and efficient cloud operations. To fully capture that value, however, enterprises must identify and engage with Azure services partners that can execute with consistency, agility, and domain depth," says Pushkaraksh Shanbhag, associate research director, IDC Asia/Pacific.

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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