



**capioIT**

Salesforce Asia Pacific  
Systems Integration and  
Services Providers  
Capture Share Report -  
2023

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## FOCUS POINTS

- > At the global level, Salesforce continues to dominate the SaaS and Customer Experience ecosystem, and it is the benchmark SaaS and Customer Experience platform. Whilst this dominance is less pronounced in the Asia Pacific region, it is still the critical provider for a customer experience platform.
- > In the Asia Pacific, revenue for the year ending January 2022 was estimated to be US\$2.5 billion, with growth close to 25% in constant currency. Australian revenue for the same period is over AU\$1 billion, growing at a premium to the region.
- > In recent years Salesforce has spent considerable capital on investments, most notably for the region, Slack and Mulesoft. The challenge for Salesforce and the overall ecosystem is getting the most value from the acquisitions.
- > Mulesoft has been the most successful of the three most strategic and capital-intensive acquisitions. A focus on integration central to enterprise applications enables this. Mulesoft has been particularly successful in Australia and the broader Asia Pacific region, emphasising the importance of integration for local clients.
- > The value generation from Slack is still challenged globally and in the local region. Before the acquisition, Slack did not have the penetration to drive the Asia Pacific market, particularly in North Asia, so there is a lot of potential upside remaining.
- > For purely internal reasons, Salesforce can be self-limiting with constant reference to CRM. It is no surprise, therefore, that in many Asia Pacific markets, customers and prospects, there is still the perception that it is merely a CRM provider. It needs to shake this and have more compelling locally based solutions for customer stakeholder experience.
- > Dreamforce in 2022 was a celebration as the event had returned to being face-to-face. Approximately 50,000 attendees enjoyed the unique Dreamforce experience; little changed from pre-Covid days in energy and value generated, and a speaker and entertainment list the envy of any other conference. Asia Pacific firms were represented as trailblazers, including Telstra and Xero.
- > In terms of Dreamforce content, the critical launch was, of course, Genie. Genie is designed to integrate and optimise the application of data across the customer experience spectrum. Execution of the strategy has to be the number one priority for Salesforce in 2023, as it is ambitious but essential for the platform's evolution.
- > Salesforce enters 2023 with some uncertainty and potential headwinds. Salesforce has rarely in its history faced this, so the response is hypercritical. In late 2022, Co-CEO Brett Taylor resigned, leaving Marc Benioff again as sole CEO. This may or not work, there is no perfect leadership model, but there is some uncertainty in the senior leadership.
- > The economic outlook that the global economy faces is also relevant in the local market. Interest rate corrections, inflation, geopolitical instability, lingering supply chain and COVID-related challenges must be watched. The difference is that the Asia Pacific region

is the engine of growth moving forward for the global economy. It will not be immune but is much better placed than Europe and other regions to manage the challenges.

> No discussion on the Salesforce ecosystem can be made without significant reference to the skills issues. Salesforce and the ecosystem have, on balance, made a substantial improvement to the deficit. The challenge is that the ecosystem is growing faster and with increased scale compared to any other SaaS platform and that the demand for skills from the PaaS and IaaS Hyperscalers, AWS, Azure and GCP is distorting the market. It is important to remember that skills shortages are paramount; automation isn't everything; it will not solve the problem, just help manage it. The added complication for the Asia Pacific region is the importance of local markets, especially India, for global delivery. The resources are in the region; they are not always available for local Asia Pacific based client delivery.

> It is worth reinforcing the importance of the Trailhead ecosystem and Salesforce's AppExchange. They are both strong contributors to the growth in skills and the ISV and SI ecosystems. In 2023, whilst Genie is the priority, increased focus on the marketplace and engagement portals will help facilitate ecosystem growth and manage the TCO of investment in Salesforce.

> From the System Integrator (SI) perspective, the Salesforce ecosystem in the Asia Pacific is buoyant. All global firms have a local presence in the region with mature capabilities commonplace. The growth in local providers is so essential for the regional market. All major areas of the Asia Pacific have an emerging ecosystem of providers of Salesforce services. This is critical to growing the ecosystem and will likely encourage more investment. Building local providers is the number one priority for the regional Salesforce partner group.

> The customer's customer is the critical user that has to be optimised by solution providers in Salesforce. Vendors who can understand their customer's customers directly enable success in the application of Salesforce. This requires feet on the street. SI's need to be on the shop floor with clients and understand how the technology is used. This requirement equally applies to Salesforce itself. One concern a Salesforce client can have is that it needs to be closer to its clients and the overall market.

> As with the global study, Accenture continues to enjoy overall leadership in the market. Deloitte, Infosys and PwC are the strongest challengers, and IBM, Capgemini, Wipro, and TCS are also Market Makers. Whilst they are not in the overall leadership group, a strong cohort of included local providers is vital for the market growth. At a country level, some of these vendors provide genuine leadership, and two emerging vendors have been ranked as leaders in the individual attributes, Beryll and Carnac.

> capiolIT included 19 vendors in the study. The growth in vendors from 14 in the previous version of the report is a positive reflection of the development and increased maturity of the local providers in the Salesforce ecosystem. Newly included vendors included Carnac, Dentsu, 8Squad and Mav3rik .

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## ***HOW CAPIOIT MEASURES VENDOR CAPABILITY IN THE ASIA PACIFIC SALESFORCE SYSTEMS INTEGRATION AND SERVICES PROVIDERS MARKETPLACE***

A Capture Share report is the established methodology used by capioIT to rank providers in global and other geographic markets across a range of technology and business services sectors. The Capture Share report output is an objective, market-based analysis of 17 key capabilities and attributes of selected service providers.

These attributes are focused on two key areas, Transform and Leverage. In simple terms, transform is a vendor's ability to engage and create processes and more substantial measurable business outcomes for clients. Leverage is focused on working in a broad, integrated ecosystem and providing scale to creating and measuring client outcomes.

To ensure the integrity of the analysis and data, the individual attributes are weighted in percentage terms based on the overall influence of the Transform and Leverage capabilities.

Data and process integrity are critical components of a report of this type. Fundamentally, the data be valid and untarnished. Ensuring integrity, all information for measuring and assessing these attributes comes from various accurate sources. Sources of information include buyers of Salesforce services solutions regionally and globally, vendor briefings and meetings, media sources, the Salesforce ecosystem and specific end-user feedback from a range of customer sizes, use cases and attributes.

The following table defines each of the attributes. These tables also provide the weighting of each attribute in the analysis.

Leverage Attribute	Definition	Weighting
Customer Satisfaction	Customer Satisfaction sourced from customer discussions and Salesforce AppExchange etc.	20%
Solution Portfolio Depth	Depth of offerings across customer requirements for Salesforce	15%
Certified Salesforce Professionals	Dedicated Certified Salesforce professionals in the Asia Pacific	15%
Country Strength	Depth, maturity and capability of country subsidiary	12%
Sales Team Strength	Quality, depth of sales team and engagement	8%
Delivery Partnerships	Partnerships to deliver to client requirements across the Asia Pacific	10%
In Country Geographic Reach	Breadth of country based geographic capabilities	8%
Country localisation	Offerings designed for the local market	8%
<b>Total</b>		<b>100%</b>

Transform Attribute	Definition	Weighting
Internal R&D	Internal R&D focused on Salesforce related Services	10%
Leverage Salesforce R&D	Platform to leverage Partner Salesforce R&D	10%
Salesforce Ecosystem Partnership	Depth of partnerships in the Salesforce ecosystem	15%
Global Solution Development	Development of portfolio offerings that are Asia Pacific region in scope and capability	5%
Industry Solution Development	Development of industry specific solutions for clients	15%
Country Solution Development	Strength and quality of client outcomes from engaging the provider	5%
Salesforce Platform Implementation	Investment in Salesforce platforms and related services	20%
Strength of Brand	Reputation and credibility of brand in the local and regional marketplace	12%
Ability to influence external market	Strength of the provider to create market awareness and influence	8%
<b>Total</b>		<b>100%</b>

The following section highlights the leadership in each of the 17 attributes included in the report. The vendor/s next to the attribute represents the highest-ranked vendor for that attribute. It highlights that for some factors, the leadership is spread across multiple vendors, e.g. Leverage Salesforce R&D, whereas for other factors, such as Internal R&D, leadership rests with one vendor.

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## ***RANKING THE ASIA PACIFIC SALESFORCE SYSTEMS INTEGRATION AND SERVICES PROVIDERS***

The Salesforce services market has innovation, scale and momentum across the spectrum from consulting, integration, and increasingly, albeit off a small base, managed services solutions. Salesforce has experienced substantial growth in recent years; revenue has doubled globally from 2019 to 2022, and even more quickly in region. The value of the ecosystem has increased at an even greater rate. This acceleration in value and opportunity has been driven by the increased strategic importance of Salesforce in the enterprise operated by the need for a complete end-to-end customer experience capability, mainly as a result of the changes in business and government service and product delivery as a result of the COVID pandemic and subsequent challenges. As 2023 begins, most SI's with mature and leading capabilities are placing the strategic importance of their Salesforce Platform investments on a similar pedestal to AWS and Azure. For many, if forced to choose, the Salesforce Platform remains more strategically and financially crucial than Oracle, with growth at a multiple when Salesforce is compared with Oracle.

Consolidation globally and regionally now is much more pointed based on filling specific geographic or solution capabilities. For example, in 2021, IBM acquired 7 Summits and Waeg to fulfil particular requirements for the overall IBM strategy from a consulting perspective around AI and the cloud.

capioIT carefully selected 19 significant providers in the Asia Pacific Salesforce Systems Integration and Services Providers to undertake a Capture Share addressing the competitive environment of the Asia Pacific Salesforce Systems Integration and Services Providers marketplace. This is a rise in vendor numbers and reflects the increased investment in the platform and the competitive nature of the ecosystem. This version added a few vendors to the study to reflect their growth and investment in local markets. Whilst they are not necessarily broad leaders across the Asia Pacific region, they have strengths and capabilities in their local market that differentiate them.

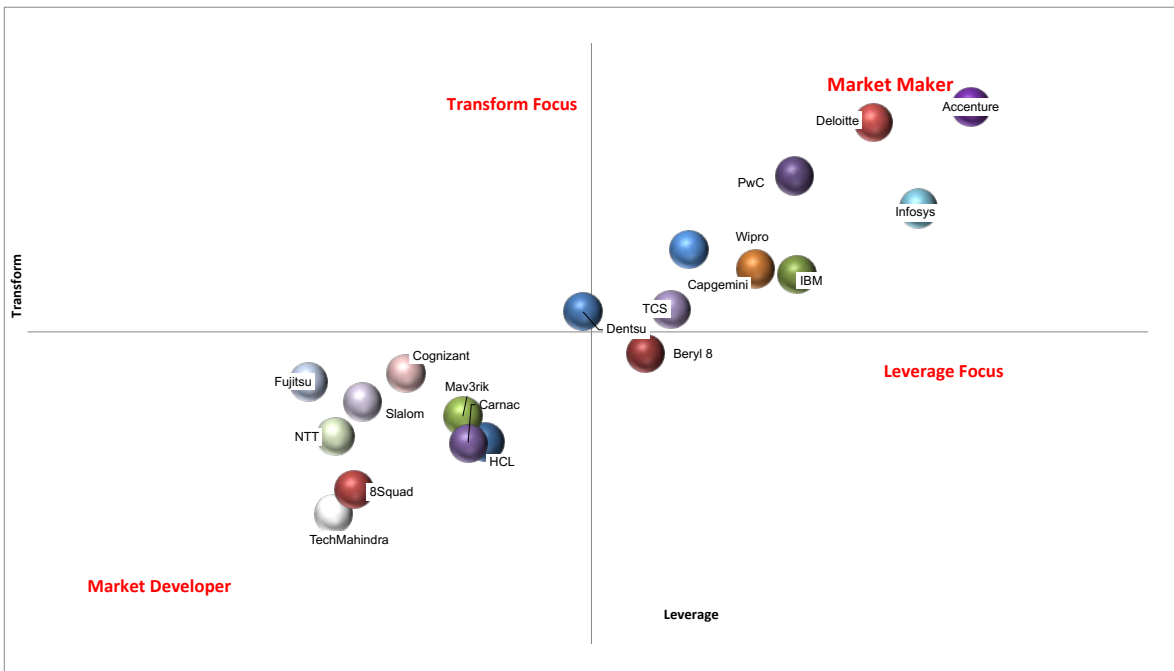
For example, if the study was focused on Australia, the likes of 8Squad would have even higher visibility, and in ASEAN, Beryl8 would, of course, have an even higher profile. It will be insightful to watch these vendors' growth and leadership in their local market and how that migrates to regional leadership and influence.

For more details on the Capture Share methodology, please see Appendix 1.

The following vendors were included in the analysis:

- 8Squad
- Accenture
- Beryl 8
- Capgemini
- Carnac
- Cognizant
- Deloitte
- Dentsu
- Fujitsu
- HCL
- IBM
- Infosys
- Mav3rik
- NTT
- PwC
- Slalom
- TCS
- TechMahindra
- Wipro

The chart below highlights the Capture Share results. Accenture has replicated the global leadership on leverage-based metrics of scale and reach and scored strongly in the transformation category.



The top four vendors, Accenture, Deloitte, Infosys and PwC, provide genuine business outcomes for clients and have strong capabilities to transform and leverage client requirements. They differentiate based on the depth of their relationship, the broad industry, engagement with Salesforce and the overall ecosystem. It is more than capacity; it is the ability to transform client-customer experiences. In short, their key differentiation is more than the scale of their capacity. Leadership in the region also has required these vendors to have capabilities to deliver customised solutions across geography, from India to Japan and New Zealand.

Following these four are IBM, Wipro, Capgemini and TCS. All cover the breadth of Salesforce capabilities and have localised capabilities in all markets. It is positive to note that three of the eight leaders are Asia Pacific based firms, whilst all other leaders have made long term commitments to the region across various technology sectors.

As the chart highlights, there are four positions on the Capture Share. The axis of the Capture Share indicates the average ranking. For example, a vendor ranked as a Market Maker has scored above average on both the transform and leverage attributes. A Leverage Focus vendor is above average for the leverage attribute. A Transform Focus vendor is above average for the transform attribute.

#### Vendors Rated as Market Maker

- Accenture
- Capgemini
- Deloitte
- IBM
- Infosys
- PwC
- TCS
- Wipro

#### Vendors Rated as Transform Focus

- Dentsu

#### Vendors Rated as Leverage Focus

- Beryl8

#### Vendors Rated as Market Developer

- Carnac
- Cognizant
- Fujitsu
- Globant
- HCL
- Mav3rik
- NTT
- Slalom



- TechMahindra

Accenture leads the Asia Pacific market. It has over 700,000 employees globally across the enterprise, most of which are based in the Asia Pacific region. The number of certified consultants highlights the ability to provide solutions at scale and is a very significant determinant of the leaders from the Market Developer vendors.

In terms of leadership in the Capture Share report, Accenture is the outright leader in four attributes and joint leader in eight others. It has leadership in 12 of the 17 attributes and ranked as the leader in all previous analysis versions from 2014. Accenture is the partner of the year in the Asia Pacific region for various crucial cloud-based platforms.

Deloitte has strength across most regions in Asia Pacific. It is increasingly able to build out Salesforce capacity based on a platform approach with various accelerators and pre-configured solutions.

PwC offers deep industry and transformation experience across enterprises in the region. It also has a powerful CSR approach for appropriate local entities. Increasingly it is leveraging Tax capabilities to change the economics of engagement. Indian capabilities have been accelerated by the acquisition of Venerate in mid 2022.

Infosys has a strong capability across the board in Salesforce that is important as it balances scale with intimate client delivery. This is a crucial strength for it.

IBM Consulting regained momentum in 2022 in the region. The Salesforce practice strength is a vital result of this and was supported by acquisitions that bought IP to the local market.

Wipro has success in Salesforce in the Asia Pacific region based on key industry vertical capabilities such as Financial Services and the legacy of a substantial acquisition approach.

Capgemini provides a high level of transformative capabilities in Salesforce solutions, and the capacity is powerful from a geographic perspective in Australia and has made inroads into more emerging markets such as Greater China.

TCS has been awarded Market Maker status in the Asia Pacific region based on breadth of engagement and industry focus markets such as Financial Services

One vendor is scored as Transform-focused. Dentsu. Dentsu is a leading agency-based partner; in the region, it has particular strength and capabilities in Japan and, with recent acquisitions, Australia.

Thailand based Beryl8 is the only vendor ranked as Leverage-focused. It is also the only emerging vendor to make one of the leading positions. This reflects the strength of Beryl8 for clients in Thailand and ASEAN and its positioning as a key partner of Salesforce and graduate of Salesforce Ventures.

The remaining vendors are Market Developers. Whilst they have had varying stages of maturity in Salesforce solutions, all are investing. What is most exciting are the emerging

vendors included in the study, Mav3rik, Carnac and 8Squad. For future studies, even more, country-based providers will emerge to challenge overall leadership. All the firms in the report can provide strong client outcomes for Asia Pacific customers. The essential requirement for these vendors is to continue to grow and invest in the platform with a resultant global capability. The other key factor is strengthening the relationship with Salesforce, particularly for vendors with moderate relationships with various platform providers across the IaaS, PaaS, and SaaS space.

The following charts highlight the rankings and average scores for the two Transform and Leverage attributes.

Vendor	Average Transform Score
Accenture	8.6
Deloitte	8.5
PwC	8.2
Infosys	8.0
Capgemini	7.8
Wipro	7.7
IBM	7.7
TCS	7.5
Dentsu	7.4
Beryl 8	7.2
Cognizant	7.1
Fujitsu	7.0
Slalom	6.9
Mav3rik	6.8
NTT	6.7
HCL	6.7
Carnac	6.7
8Squad	6.4
TechMahindra	6.3
	<b>7.3</b>

For the Transform capabilities, nine of 19 vendors were ranked above average, with the remainder below average. From a transformation viewpoint, Accenture, Deloitte, PwC and Infosys all scored above 8. Other leaders in the transform category include Capgemini, Wipro, IBM, TCS and Dentsu.

The rest have ground to make up in the Transform capability. Transforming client outcomes and success has to be the priority if vendors can convince prospects that they have differentiated capabilities in Salesforce. For the smaller vendors included in the study, scale is a limiting factor in the ability to transform, but for most of them, the building blocks are in place.

Vendor	Average Leverage Score
Accenture	8.5
Infosys	8.4
Deloitte	8.3
IBM	8.1
PwC	8.1
Wipro	7.9
Capgemini	7.8
TCS	7.7
Beryl 8	7.7
Dentsu	7.5
HCL	7.3
Carnac	7.2
Mav3rik	7.2
Cognizant	7.0
Slalom	6.9
8Squad	6.9
NTT	6.8
TechMahindra	6.8
Fujitsu	6.8
	<b>7.5</b>

Nine of the 19 vendors scored above the average for the leverage characteristics. The new entrants to the market generally need more leverage or scale capabilities in the market. The long-term investment is required to meet the likes of Accenture, Deloitte, Infosys, IBM and PwC, that all lead in the Asia Pacific market. Success in the leverage components requires increased scale in industry, geography, and the portfolio of Salesforce. Achieving this takes work. The Asia Pacific region is large and diverse. Whilst Salesforce is focused on key markets, investment across the region consistently requires capabilities present on the ground in ASEAN, Australia, China, India and Japan at the minimum. Of course, a story is to be told for each vendor and their business objectives. For example, Japanese firms have struggled to grow beyond this market for Salesforce and cloud solutions.

The average rating for each of the attributes is in the following tables. In the Asia Pacific, there is relatively less divergence across the attributes than at the global analysis level. This may be reflective of the dominance of a few vendors regionally, as well as the varying maturity of the market in the Asia Pacific region, with arguably only Australia being close to maturity.

Average Leverage Attribute Score	Score
Customer Satisfaction	7.8
Solution Portfolio Depth	7.6
Certified salesforce.com skills	7.3
Country Strength	7.3
Sales Team strength	7.6
Delivery Partnerships	7.4
In Country Geographic Reach	7.3
Country localisation	7.6
<b>Average</b>	<b>7.5</b>

Customer Satisfaction is the essential attribute for the measurement of leverage capabilities. In the Asia Pacific region, it leads the way for leverage with the highest average score. Three vendors were ranked as leaders, including Beryl8. Beryl8's result provides insight that emerging providers have the potential to drive leadership capabilities in the market if they can align capacity in Customer Satisfaction with other attributes in the leverage attributes such as country strength, delivery partnerships and certified salesforce.com skills.

Average Transform Attribute Score	Score
Internal R&D	7.8
Leverage salesforce.com R&D	7.6
salesforce.com Ecosystem Partnership	7.7
Global Solution Development	6.4
Industry Solution Development	7.1
Country Solution Development	7.1
salesforce.com Platform Implementation	7.4
Strength of Brand	7.2
Ability to influence external market	6.9
<b>Transform</b>	<b>7.3</b>

Research and Development (R&D) remains well-invested in the ecosystem. This is positive; both R&D attributes are above the average for Transform. The positive result is also an outcome of the large delivery centres in the Asia Pacific region. The local market needs more industry and country-based solutions for the local markets and industry requirements. The other noteworthy issue is the lower ability to influence the market, and this reflects the newer vendors that do not have the influence yet at a regional level to match that of the largest SI providers.

Not surprisingly, Accenture leads the way in 13 of the 17 attributes. For four of these attributes, it stands alone at the top of the rankings. The scale and breadth of Accenture have resulted in this being a consistent result across several editions of this report.

Deloitte, PwC and Infosys follow Accenture as leaders in individual attributes alongside Thailand based Beryl8. Nine of the 19 vendors included in the study appeared as top ranked vendors. This reflects that whilst the market is led by global SI's; there is space for skilled and focused vendors to emerge as leaders in select markets.

Note - Multiple vendors can share leadership in the market due to the measurement of leadership. Where there is one vendor named, that vendor is the highest ranked vendor, with no other vendor having an equivalent score. Where there are multiple vendors, all were ranked as equal leaders in the market.

**Leverage Attribute Top Ranked Vendors (note can be multiple vendors)**

Customer Satisfaction	Beryl8, Infosys, Wipro
Certified Salesforce Skills	Accenture,
Solution Portfolio Depth	Accenture, Deloitte, Infosys
Overall Country Strength	Accenture
Sales Team Strength	Accenture, Deloitte, PwC
Delivery Partnerships	Infosys, TCS
In Country Geographic Reach	IBM
Country Localisation	Accenture, Deloitte, IBM, Beryl8

**Transform Attribute Top Ranked Vendors (note can be multiple vendors)**

Internal R&D	Accenture, Beryl8, Deloitte, Infosys, PwC, Wipro
Leverage Salesforce R&D	Accenture, Deloitte
Salesforce Ecosystem	
Partnership	Accenture, Deloitte
Global Solution Development	Accenture
Industry Solution Development	Accenture, PwC
Country Solution Development	Carnac
Salesforce Delivery Platform	Accenture, Deloitte
Strength of Brand	Accenture, Deloitte
Ability to influence external market	Accenture

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## **WHAT ATTRIBUTES DO LEADERS IN THE ASIA PACIFIC SALESFORCE SYSTEMS INTEGRATION AND SERVICES PROVIDERS SHARE**

Leaders in the Asia Pacific Salesforce Systems Integration and Services Providers marketplace share core attributes

- Leaders in the Asia Pacific Salesforce Systems Integration and Services Providers marketplace share core attributes
- Long-term investment in the Asia Pacific Salesforce marketplace
- Growth with Salesforce. As it expands into new Asia Pacific geographies or platform capabilities, leading partners are the first to move with them.
- The global commitment of capital and resources to the Salesforce ecosystem in the Asia Pacific
- Integration and cross-investment to a broader SAAS ecosystem and increasingly the Public Cloud Platforms of Google, Azure and AWS.
- Investment in a regional capability to support Salesforce expansion
- Engagement in Trailhead to drive certification, culture and skills.
- Focus on IP and asset-based solutions, not just throwing human resources at the problem.
- Development of outcomes to drive business success that is measured
- Above all others, enabling Salesforce clients to move enhanced customer experiences

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## **CHARACTERISTICS OF THE MARKET MAKER RANKED PROVIDERS**

### **Accenture**

Top three Salesforce solutions capabilities

- Solution Portfolio Depth
- Country Strength
- Industry Solution Development

### **Capgemini**

Top Three Capgemini Capabilities

- Industry Solution Development
- Internal R&D
- Country Solution Development

### **Deloitte**

Top Three Deloitte Capabilities

- Country Solution Development
- Industry Solution Development
- Solution Portfolio Depth

## **IBM**

### Top Three IBM Capabilities

- In Country Geographic Reach
- Industry Solution Development
- Salesforce Ecosystem Partnership

## **Infosys**

### Top Three Infosys Capabilities

- Internal R&D
- Solution Portfolio Depth
- Delivery Partnerships

## **PwC**

### Top Three PwC Capabilities

- Customer Satisfaction
- Industry Solution Development
- Internal R&D

## **TCS**

### Top Three Cognizant Capabilities

- Certified Salesforce Skills
- Global Solution Development
- Delivery Partnerships

## **Wipro**

### Top Three Wipro Capabilities

- Customer Satisfaction
- Internal R&D
- Global Solution Development

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# ***APPENDIX 1 - METHODOLOGY FOR THE CAPTURE SHARE ANALYSIS***

Capture Share reports are based on analysing 17 key capabilities and attributes of service providers. These attributes are focused on two key areas, Transform and Leverage.

To undertake the appropriate level of analysis and data integrity, the individual attributes are weighted in percentage terms based on the overall influence of the Transform and Leverage capabilities.

Data and process integrity are critical components of a report of this type. Fundamentally, the data be valid and untarnished. To help ensure this, all information for the measurement and assessment of these attributes comes from various sources. Sources of information include Salesforce, Salesforce users, vendor briefings and meetings, media sources, the IT solutions ecosystem and specific end-user feedback.

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## ***ABOUT CAPIOIT***

capioIT was founded in 2010. It is focused on helping organisations capture and understand emerging digital technology in emerging markets of the global economy. CEO Phil Hassey has over 20 years of experience in corporate strategy, consulting and market intelligence, gained in various organisations and industries.

### **The core of capioIT -**

**Capture** – Focus on ensuring that you capture the current and future pulse of emerging markets and emerging technology.

**Understand** – Source information to ensure that all customers and stakeholders can understand and drive strategy to maximise customer engagement.

**Collaborate** – Through strategic partnerships, we have ensured that a small regionally based firm has highly elevated levels of market engagement and influence across technology and geography.





**Innovate** – We are not satisfied with the current evolution of the analyst/research market. We have listened and engaged, and we drive innovation through our engagement model, business culture, use of social media and relationships.



**Capture Understand Collaborate Innovate**

**Phone:** +61 (0)422 231 793 **Email:** phil@capiolT.com **Twitter:** PHassey **Web:** www.capiolT.com  
26 Aboud Avenue, Kingsford, NSW, 2032

