IDC MarketScape

IDC MarketScape: Asia/Pacific Application Modernization Services to AWS 2025 Vendor Assessment

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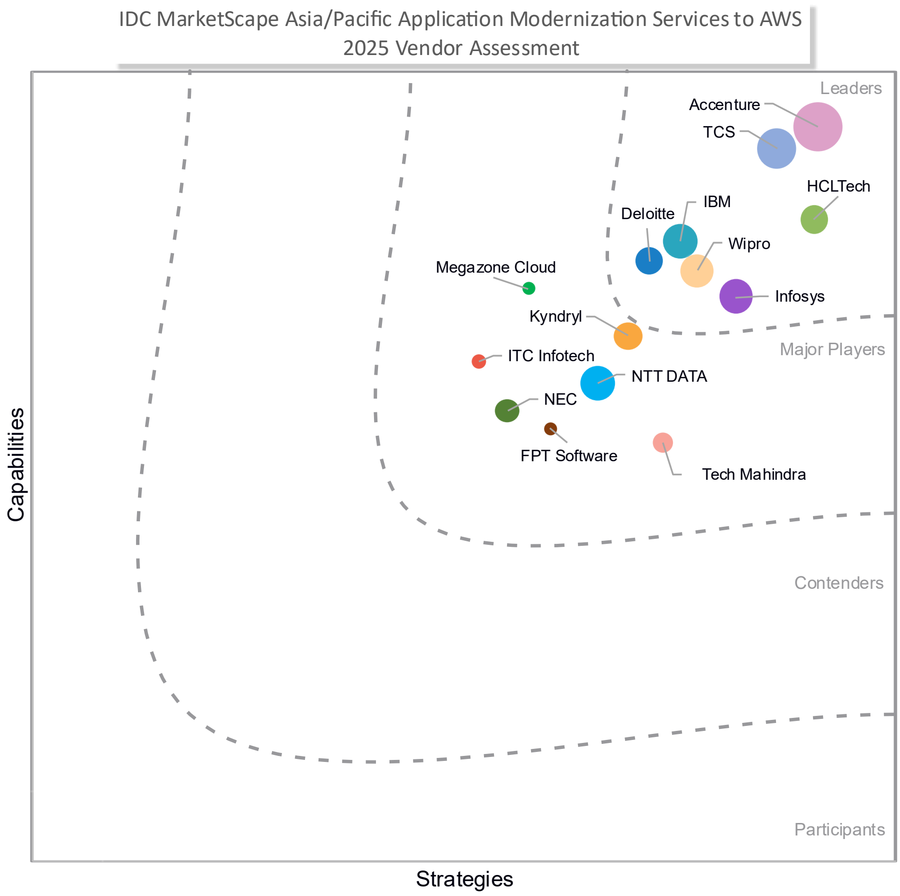
THIS MARKETSCAPE FEATURES ACCENTURE AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Asia/Pacific Application Modernization Services to AWS



Source: IDC, 2025

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

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ABOUT THIS EXCERPT

The content in this excerpt was taken directly from IDC MarketScape: Asia/Pacific Application Modernization Services to AWS 2025 Vendor Assessment (Doc #AP52998825).

IDC OPINION

Using the IDC MarketScape model, IDC assessed 14 external professional IT services vendors that provide application modernization services to Amazon Web Services (AWS). In an environment where cloud has become integral to the modern enterprise IT architecture, IDC found that there is fierce competition among service providers offering application modernization services to AWS. Some aspects of the application modernization services market, such as migrating to cloud infrastructure and application instance consolidation, have matured, while other aspects of the application modernization services market, like migrating legacy applications to software-as-a-service (SaaS) solutions, microservices architecture, integration of cloud-native services and capabilities, addressing emerging requirements around digital sovereignty and GenAI adoption, and enablement of seamless multi and hybrid cloud environments have grown more popular.

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

- Providing technical and functional insights and competence
- Complying with existing or new regulations
- Enhancing usage of cloud-based services and capabilities
- Strengthening and expanding customer experiences and relationships

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

- Reducing costs for customers
- Helping customers expand into new markets/geographies
- Overcoming competitive pressures
- Delivering innovation in a proactive manner

Finally, 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 other vendors, and include:

- Achieving greater flexibility by offering variable pricing models
- Delivering innovation in a proactive manner
- Having presence of local offices and resources/optimizing onsite-offshore ratio

- Delivering project value for fee paid

There was meaningful difference observed in vendors' relative focus and volume of execution across application modernization tactics (e.g., rehost/replatform vs. rearchitect/cloud-native development, etc.), workload types and ISV-specific expertise, and application modernization to AWS project mix (project-oriented vs. managed services), and composition (inclusion of consulting and experience design services in the modernization projects), 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 study and engage with IDC analysts to understand the vendors' strengths and capabilities within their country of operation and suitability for their specific requirements to identify the partner best equipped to help them achieve their cloud 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:

- Each participating service provider was required to possess a wide variety of end-to-end service delivery capabilities that included packaged application upgrades, application instance consolidation, infrastructure modernization, custom application development, and application migration to AWS environments.
- A minimum of US$5 million Asia/Pacific revenue generated from the delivery of application modernization and migration services to AWS in CY2024.
- Delivery capabilities and customers in at least two of the following Asia/Pacific subregions: Australia/New Zealand (ANZ), Greater China, Southeast Asia, Korea, India, and Japan.

ADVICE FOR TECHNOLOGY BUYERS

Based on this study, IDC offers the following recommendations to buyers looking for application modernization and migration services to AWS to support their key business and technology objectives:

- **Identify your application modernization drivers**. 77% of regional enterprises surveyed in the IDC Asia/Pacific IT and Business Services Sourcing survey 2025 (July 2025) indicate that application modernization is a "top" or "very high" priority for them, and 42% of respondents in the same survey identify "technical migration services" as the number 1 area related to application modernization for which enterprises need external expertise. These findings underscore just how important and interlinked application modernization, and migration to modernization paradigms like cloud platforms are. However, the drivers of modernization vary by subregion and industry. For instance, while "new innovation" is the top driver for application modernization among ANZ enterprises, Singaporean enterprises identify "speed to market" as their number 1 driver for application modernization. These findings provide crucial insight into the kind of attributes and capabilities enterprises need to assess and evaluate vendors on.

- **Tackle environmental complexity**. Most enterprise application estates today are very heterogeneous and highly complex, featuring a mix of application types — legacy and mainframe, custom, packaged, SaaS, cloud-native, and so forth, across a diversity of cloud and noncloud environments, often with intricate and poorly understood interdependencies. Modernizing applications in these environments often requires vendors with experience in complex systems integration, a vast breadth of ISV partnerships, and modern application development/deployment expertise in hyperscaler environments, among others. Understanding the nature of modernization required in your environment is key to identifying the right partner for your application modernization journey.
- **Focus on outcomes, not activities**. While application modernization is undoubtedly a highly technical exercise, enterprises need to look at it through a business lens also — how can application modernization help them expand into new markets or regions, reduce cost of operations, deliver operational agility, accelerate innovation, and so forth. IDC's conversations with enterprise users of application modernization services reveal that these are often the areas where vendors have room for improvement. Prioritize vendors that demonstrate an openness to engage in business value conversations and codify them into contractual obligations.
- **Use this evaluation in your vendor selection process.** Use this IDC MarketScape as a tool not only to shortlist 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 this report details areas of strengths and potential challenges of each vendor as identified by clients. Additionally, tips about when to consider a provider are included at the end of each profile.

VENDOR SUMMARY 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 application modernization services to AWS vendor assessment.

Accenture is a global professional services firm and an AWS Premier Tier Services Partner. Its application modernization and migration services are delivered through the Accenture AWS Business Group (AABG), a dedicated unit built on a strategic partnership of over 15 years. Accenture specializes in complex, large-scale transformations and possesses numerous AWS competencies, including key specializations in migration, mainframe modernization, SAP on AWS, DevOps, and generative AI (GenAI), demonstrating validated expertise across critical modernization domains.

Accenture's key differentiators include a suite of over 200 proprietary assets and accelerators. Notable among these are the Velocity platform, codeveloped with AWS to accelerate cloud transformation, and the Majalis framework for mainframe modernization. Its deep regional delivery capabilities are supported by 22 delivery centers and a robust talent pool of AWS-certified professionals in Asia/Pacific. Innovation is fostered through a network of regional hubs which focus on cocreating solutions with clients in areas such as GenAI and data analytics.

Strengths

- **Extensive and specialized AWS competencies**: Accenture's status as an AWS Premier Tier Services Partner is supported by a broad array of competencies that are highly relevant to application modernization. Its validated expertise in migration and mainframe modernization provides clients with a proven, low-risk path for transforming their most complex legacy systems. Additional competencies in SAP on AWS, DevOps, and security ensure that enterprise-grade workloads are migrated, modernized, and optimized for performance, agility, and compliance in the cloud.
- **Deep AWS partnership and co-innovation**: The AABG exemplifies a deep strategic alignment with AWS, resulting in codeveloped solutions like the Velocity platform and the Accenture Responsible AI Platform powered by AWS. This collaboration includes joint investments through programs like the Accenture-AWS Modernization Program (AAMP), designed to accelerate large-scale transformations. This ensures clients receive solutions tightly integrated with AWS' technology road map.
- **Comprehensive capabilities for legacy system modernization**: Accenture has proven capabilities in modernizing complex, mission-critical systems. Its expertise covers mainframe modernization, evidenced by its proprietary Majalis tool, and a strong focus on large-scale SAP migrations.

- **Extensive talent pool and delivery network in Asia/Pacific**: Accenture offers significant regional scale and delivery presence across Asia/Pacific. This footprint is strengthened by strategic regional acquisitions that enhance local expertise. The company is also heavily investing in future skills, with plans to train a significant portion of its AWS workforce in AI and GenAI.

Challenges

- **Pricing rigidity and focus on large-scale engagements**: Accenture's strength in the large enterprise segment and predominant use of fixed-price and milestone-based commercial models position it as a premium provider, making it less accessible or flexible for midsize organizations or for clients that require bespoke commercial constructs for smaller projects. Customer feedback validates this observation.
- **Inconsistent experience in project delivery and staffing**: Feedback from some customers that IDC interacted with indicates robust technical strength and capability, but some variability in satisfaction related to project execution. Ensuring appropriate levels of local staffing and managing staff turnover effectively were identified as specific challenges.

Consider Accenture When

Buyers should consider Accenture when undertaking a large-scale, complex enterprise transformation on AWS, especially one involving the modernization of mission-critical systems. The vendor is well-suited for organizations that prioritize a structured, low-risk approach backed by a partner with a deep talent pool, field-tested assets and methodologies, and a broad range of verified AWS competencies.

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 to 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 go-to-market plans for the next three to five years.

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

This IDC MarketScape exercise is a result of 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.

While the 14 vendors evaluated and profiled in this report are important participants in the Asia/Pacific application modernization services to AWS 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 in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior and capability.

Market Definition

Application Modernization Services

Application modernization services are services geared toward transforming an organization's existing business applications to newer, up-to-date technologies that enhance the application's utility and value to its intended users and consumers. While many aspects of application modernization services are mature, there are some elements of modernization services delivery that are budding. Application modernization services can revolve around a variety of areas that include:

- **Infrastructure modernization**. These services center on upgrading the underlying infrastructure supporting applications and rehost or replatform legacy or older packaged applications to newer infrastructure (i.e., cloud and virtual infrastructure).
- **Packaged application upgrades**. These services center on upgrading existing packaged applications (e.g., SAP and Oracle) to the most recent or newer packaged application releases.
- **New custom development using modern technologies**. These services center on migrating custom-developed legacy applications (e.g., COBOL) into a

new custom application built on newer development languages (e.g., open source, Ruby, and Python).

- **Custom application to packaged application migration**. These services center on migrating existing custom-developed applications (e.g., COBOL and Java) to commercially available packaged applications (e.g., Oracle, SAP, and Microsoft Dynamics).
- **Migration to SaaS**. These services center on migrating existing custom-developed (e.g., COBOL and Java) and/or packaged applications (e.g., SAP, Oracle, and Microsoft) to a SaaS- or cloud-based applications.
- **Service-oriented architecture (SOA)**. These services center on migrating existing applications (custom and/or packaged) to more modular SOA, containers, and microservices.
- **Instance consolidation**. These services center on consolidating application instances — whether custom developed (e.g., COBOL and Java), packaged, and/or cloud (e.g., SaaS).
- **New custom development using existing technologies**. These services center on developing new application code to extend life and utility of existing custom-coded applications and/or packaged applications.

Application modernization services, as evaluated in this research study, reviewed full end-to-end services delivery. While consulting and advisory activities are often elements of application modernization as it pertains to digital transformation, this study does not provide a deep analysis or assessment of the IT consulting or systems integration components of application modernization services. Rather, the assessment tends to focus more on modernization services that typically accompany those within custom application development and application management engagements, as well as ongoing application managed services.

LEARN MORE

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 enterprise application modernization services to AWS 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 how each vendor stands in the market, and the framework highlights the key factors that are expected to be the most significant for achieving success in the application modernization services market over the short and long term.

"With cloud firmly established as the operating model of choice for the modern enterprise, application modernization to public cloud platforms has emerged as a top priority for enterprises in Asia/Pacific as they look to power innovation, improve agility, build resilience, scale operations, and drive business outcomes. Providers of application modernization services to cloud platforms have a key role to play in helping enterprises make this journey successfully, and this report aims to help enterprises find the right modernization partner for their specific needs," says Pushkaraksh Shanbhag, Associate Research Director, IDC Asia/Pacific.

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