

IDC MarketScape

IDC MarketScape: Asia/Pacific Professional and Managed Services for Google Cloud Platform 2025–2026 Vendor Assessment

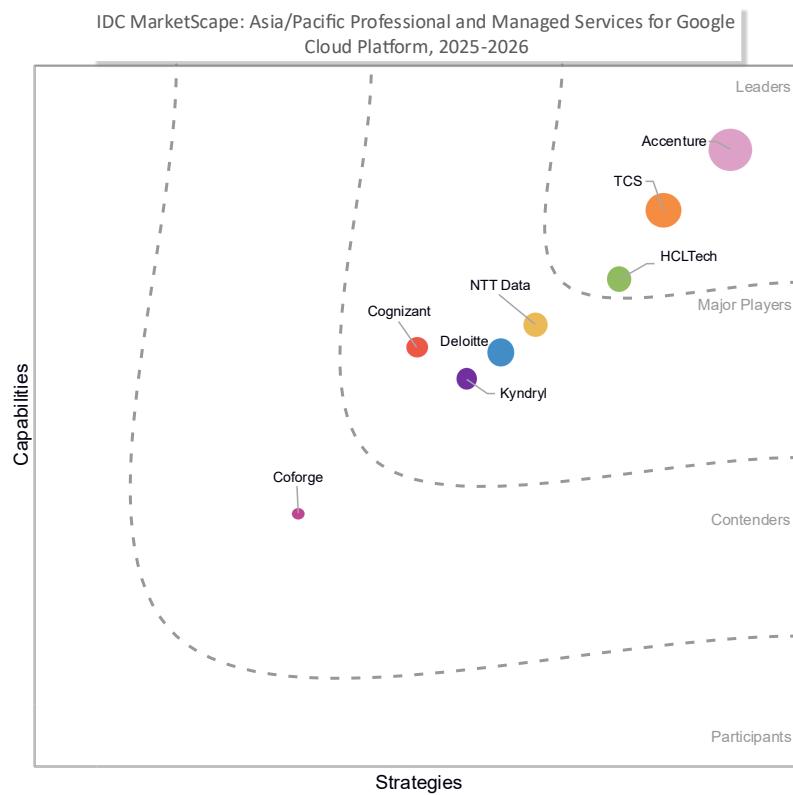
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THIS MARKETSCAPE EXCERPT FEATURES: ACCENTURE

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Asia/Pacific Professional and Managed Services for Google Cloud Platform 2025–2026 Vendor Assessment



Source: IDC, 2025

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

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Asia/Pacific Professional and Managed Services for Google Cloud Platform 2025 –2026 Vendor Assessment (Doc #AP53581425). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Advice for Technology Buyers, Featured Vendor Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

Using the IDC MarketScape model, IDC assessed eight external professional IT services vendors that provide professional and managed services for Google Cloud Platform (GCP). 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 IT SPs offering professional and managed services for and across different cloud environments, including for GCP. Some aspects of the GCP services market, such as migrating to cloud infrastructure and application-instance consolidation, and implementation and management of packaged enterprise 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 multicloud and hybrid cloud environments, support for enterprise requirements around digital sovereignty, green operations (GreenOps), and advanced security services, are growing increasingly popular.

A range of approaches were observed in vendors' relative focus and volume of execution across application modernization tactics (e.g., rehosting/replatforming versus rearchitecting/cloud-native development, and so forth), marketplace presence and associated business impact, workload types and ISV-specific expertise, and application modernization to GCP project mix (project-oriented versus managed services) and composition (inclusion of 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, as well as their suitability for specific requirements, in order 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 IT SP was required to possess a wide variety of end-to-end service delivery capabilities that included professional and/or managed cloud services for GCP.
- There should be a minimum of US\$5 million Asia/Pacific revenue generated from the delivery of professional and/or managed cloud services for GCP in CY24.
- Delivery capabilities and customers in at least two Asia/Pacific subregions, among Australia/New Zealand (ANZ), the China region (Mainland China, Hong Kong, Macau, and Taiwan), Southeast Asia, Korea, India, and Japan, were required.

ADVICE FOR TECHNOLOGY BUYERS

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

- **Prioritize partners with proven GCP migration and modernization expertise.** Select IT SPs with a strong track record in migrating complex workloads and modernizing legacy environments to GCP, leveraging cloud-native approaches, such as containers, microservices, and serverless architectures. Ask for case studies and references relevant to your industry and region.
- **Assess hybrid and multicloud capabilities.** There are 75% of organizations surveyed in the *IDC Asia/Pacific IT and Business Services Sourcing Survey 2025* (July 2025) that indicated they have meaningful workloads on more than one public cloud, and 58% operated on a hybrid cloud model. Ensure your partner demonstrates robust integration skills for GCP alongside other platforms. Look for expertise in orchestrating workloads, managing data flows, and ensuring interoperability across cloud ecosystems.
- **Evaluate AI and data modernization strengths.** As AI adoption accelerates, seek partners with deep experience and demonstrable capability in GCP's AI/ML services (e.g., Vertex AI, Vertex AI Agent Builder, Gemini models, and others) and advanced analytics. Confirm their ability to deliver industry-specific AI solutions, automate business processes, and support your organization's data modernization journey.
- **Leverage automation and cost optimization tools.** Select partners that offer proprietary or Google-native automation tools for migration, modernization, and ongoing operations. Evaluate their capabilities in financial

operations (FinOps), cost management, and sustainability (GreenOps) to maximize ROI and operational efficiency.

- **Address skills shortages with certified talent and local delivery.** Data from the *IDC Asia/Pacific IT and Business Services Sourcing Survey 2025* (July 2025) reveals that 40.7% of Asia/Pacific enterprises struggle to source the necessary skills to maximize their cloud investments. Given the ongoing skills gaps in cloud and AI, prioritize partners with a large pool of GCP-certified professionals, strong local and regional delivery capacity, and ongoing investments in talent development. Ask about their training programs, centers of excellence (COEs), and ability to scale resources for your needs.
- **Use structured evaluation and due diligence.** Apply a rigorous selection process, including requests for proposal (RFPs), proof-of-concept (POC) engagements, and detailed assessments of partner capabilities, delivery models, and customer feedback. Use frameworks, such as the IDC MarketScape, to understand providers and guide you in your decision.

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 2025–2026 IDC MarketScape for Asia/Pacific professional and managed services for Google Cloud Platform vendor assessment.

Accenture is a global professional services company with an extensive presence across the Asia/Pacific region, focusing on enterprise transformation through technology, strategy, and industry best practices. The Accenture Google Business Group (AGBG) delivers a robust portfolio of GCP professional and managed services, including consulting and advisory, cloud migration and modernization, application development, integration, and managed operations for Google Cloud estates. With a partnership spanning nearly a decade, Accenture has achieved recognition as a Google Cloud Global Services Partner of the Year for three consecutive years. Strong regional delivery capabilities are supported by a network of engineering and delivery hubs in India, the Philippines, and other major markets, and are underpinned by a large pool of GCP-certified professionals.

A key feature of Accenture's approach is its focus on building industry-oriented solutions and intellectual property (IP), often in close collaboration with Google. Notable examples include joint investments in GenAI COEs, the deployment of over 350 AI agents on the Google Marketplace, and codeveloped platforms such as AMICA (cloud-native banking), AGLOP (logistics optimization), and ai.RETAIL 2.0.

(retail analytics). Accenture's portfolio also comprises security, compliance, and governance solutions, bolstered by acquisitions such as CyberCX, which enhances its cybersecurity strength in ANZ. The company's Asia/Pacific go-to-market (GTM) strategy focuses on sector differentiation, local innovation, and delivery governance through a mix of domestic, nearshore, and offshore resources.

Accenture takes a deliberate approach to integrating with Google's wider portfolio and assets, such as geospatial and marketing platforms, with the intent to translate the ecosystem richness into client solutions, alongside a clear orientation toward security, sovereignty, and AI-led reinvention. The company's offerings are validated across multiple Google Cloud specializations, and its delivery model is adaptable, with tailored commercial constructs, such as value-based contracts. Significant emphasis is placed on continuous talent upskilling and cloud innovation, particularly via dedicated hubs and R&D centers in the region.

Strengths

- **Joint innovation and industry solutions:** The vendor has invested in building a breadth and depth of innovative joint IP with Google, as demonstrated by assets such as AMICA (digital banking platform), Customer 360 (composable CDP), and the GenAI CoE, with broad deployment across clients in Asia/Pacific.
- **Integrated security and compliance:** Through strategic acquisitions and joint solutions, such as MxDR with Google Chronicle, Accenture is able to deliver enhanced end-to-end security, compliance, and governance customized for region-specific and industry needs.
- **Customer validation of innovation and transformation credentials:** Customers IDC interacted with appreciated the vendor's ability to complex modernization and transformation requirements, modernize enterprise data ecosystems, and effectively leverage AI/GenAI capabilities for both project execution and client usage.

Challenges

- **Fixed-price dominance in engagements:** Although Accenture's use of value-based pricing contracts is expanding, fixed price (with outcome-based elements) remains a dominant construct for modernization engagements. This can result in more lengthy discussions with clients who seek value-based pricing structures.
- **Customer perception challenges:** Although Accenture's customer feedback on innovation, technology transformation, and project execution remains robust, some customer feedback suggests that there is room for improvement in representing customers' needs/requirements to the hyperscaler (Google) and rewarding client loyalty.

Consider Accenture When

Consider Accenture when seeking a partner with deep Google Cloud expertise, proven ability to co-innovate with Google at scale, and the capacity to deliver complex, secure, and industry-specific modernization or managed services across major Asia/Pacific markets. Accenture is particularly well-suited for organizations looking to blend cloud, AI/ML, and transformation into highly regulated or rapidly digitalizing sectors.

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.

The eight vendors evaluated and profiled in this report are important participants in the Asia/Pacific Professional and Managed Services for the GCP market; however, 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

Professional and Managed Services for Google Cloud Platform

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

Professional services include strategic advisory, assessment, cloud architecture and design, application and data migration, modernization, custom development, integration, and AI/ML enablement. Partners help clients leverage native GCP capabilities (Compute Engine, BigQuery, Anthos, Vertex AI, Apigee, and so forth) for business advantage.

Managed services provide ongoing operations, performance monitoring, optimization, patching, security, support, and governance for applications and infrastructure on GCP. Partners take responsibility for uptime, compliance, cost management, and security, employing automation and Google-native operation tools.

Market Segmentation

GCP Consulting and Advisory Services

- Strategy definition, cloud readiness assessment, architecture planning, and migration road maps; discovery engagements and POC

Cloud Migration and Modernization

- End-to-end migration of apps, data, and workloads to GCP; modernization of legacy environments with cloud-native approaches (containers, microservices, serverless)

Application Development and Integration

- Building custom, cloud-native solutions on GCP; enabling DevOps, CI/CD deployment, application programming interface (API) management, and integration with business systems (SAP, enterprise resource planning [ERP], customer relationship management [CRM], and so forth)

Managed GCP Services

- Proactive management, monitoring, patching, cost optimization, security, and support of GCP workloads
- Ensuring performance, reliability, and compliance for production and hybrid/multicloud environments

Data, Analytics, and AI/ML

- Advanced analytics, big data solutions, ML model development and operations, real-time data processing, intelligent automation

Security, Compliance, and Governance

- Design and management of secure GCP environments; identity and access, regulatory compliance, cyberdefense, and security operations

GCP's services ecosystem is supported by major global and regional partners recognized through Google Cloud Partner Advantage programs. These partners hold advanced specializations, certifications (such as Specialization in Cloud Migration, Specialization in Data Analytics, or Managed Services Provider), and exhaustive delivery experience referenced on Google Cloud Partner Directory and their own websites.

Each partner offers capabilities mapped across the market segments mentioned earlier, featuring deep technical skills, GCP certifications, specialized expertise in verticals (financial services, healthcare, retail, public sector), and ongoing investments in automation, cost management, and cloud-native innovation.

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 professional and managed services for Google Cloud Platform (GCP) 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, and the framework highlights the key factors expected to be the most significant for achieving success in the application modernization services market over the short and long term.

"As Asia/Pacific enterprises embrace Google Cloud Platform for modernization and AI-driven growth, choosing the right services partner is critical. Organizations should prioritize providers with robust GCP capabilities, regional delivery strength, robust industry-aligned assets, and a track record of enabling secure, optimized cloud journeys," 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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