

The Forrester Wave™: Cloud Migration And Managed Service Partners In Asia Pacific, Q4 2022

The 14 Providers That Matter Most And How They
Stack Up

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Summary

In our 27-criterion evaluation of cloud migration and managed service providers in Asia Pacific (APAC), we identified the 14 most significant ones — Accenture, FPT Software, Fujitsu, HCLTech, IBM, Infosys, Kyndryl, Megazone Cloud, NEC, NTT DATA, PwC, Tata Consultancy Services (TCS), Tech Mahindra, and Thoughtworks — and researched, analyzed, and scored them. This report shows how each provider measures up and helps technology leaders select the right one for their needs.

Additional resources are available in the [online version](#) of this report.

Broad Services, Platform Variety, And Deep Expertise Differentiate Leaders

Early on in cloud adoption, firms treated public cloud as a final destination separate from both existing infrastructure and the evolution of core business applications. Early service engagements reflected this: Some providers focused on cloud migration and modernization; others shifted traditional outsourcing models to cloud operations. Today, hybrid cloud architectures, including a mix of multiple public clouds, private cloud solutions, and on-premises infrastructure, are the norm. Firms in APAC are turning to partners that can orchestrate the end-to-end cloud journey and ongoing optimization of cloud services. However, the rapid evolution of public cloud leaves organizations with short-term knowledge and skill gaps and the long-term problem of managing increasingly complex environments — necessitating a full set of support services from advisory through operations. The partners that can best meet this need and address enterprise-level cloud requirements support a variety of platforms, offer a broad range of services, and have delivery personnel with deep expertise — all supported by a wide range of first- and third-party software assets for automation and risk reduction.

As a result of these trends, cloud migration and managed services (CMMS) customers in Asia Pacific should look for providers that:

- **Offer a broad scope of cloud platforms, services, and capabilities.** Firms are evolving their cloud architecture to adopt hybrid cloud strategies. Many expect external support that can cover multiple public cloud platforms and private cloud solutions from a single partner. While some engagements may initially focus on infrastructure operations services, this focus will move up the stack as enterprises become more comfortable with containers, platform as a service, and function as a service. Leading providers have broad support for major hyperscalers and offer strong service capabilities from advisory to operations across the entire cloud stack, including emerging cloud-native solutions.
- **Have talent engines that support emerging technology trends.** Successful providers have strategic partnerships with major hyperscalers; many are establishing hyperscaler-specific business units. To keep track of hyperscalers' development and delivery services with best practices, CMMS partners must continuously build up their talent pool and acquire and maintain the relevant certifications needed today and to meet future needs and emerging technologies. The most effective providers have set up internal communities of practice and effectively transfer knowledge to share experiences and expand the capabilities of

delivery teams. Leading providers integrate these same practices when customers require in-house talent enablement or onsite support.

- **Use software solutions as enablers to enhance delivery quality.** Software assets accelerate delivery, reduce risk, and boost efficiency of cloud advisory, migration, build, and management services. Providers differentiate by making substantive investments in homegrown software assets and capabilities to leverage third-party tools and hyperscalers' native tools. Leading providers have capabilities to build modern operations for customers to support DevOps and AIOps and simplify cloud adoption and administration via a thoughtfully curated suite of cloud planning, management, and optimization.

Evaluation Summary

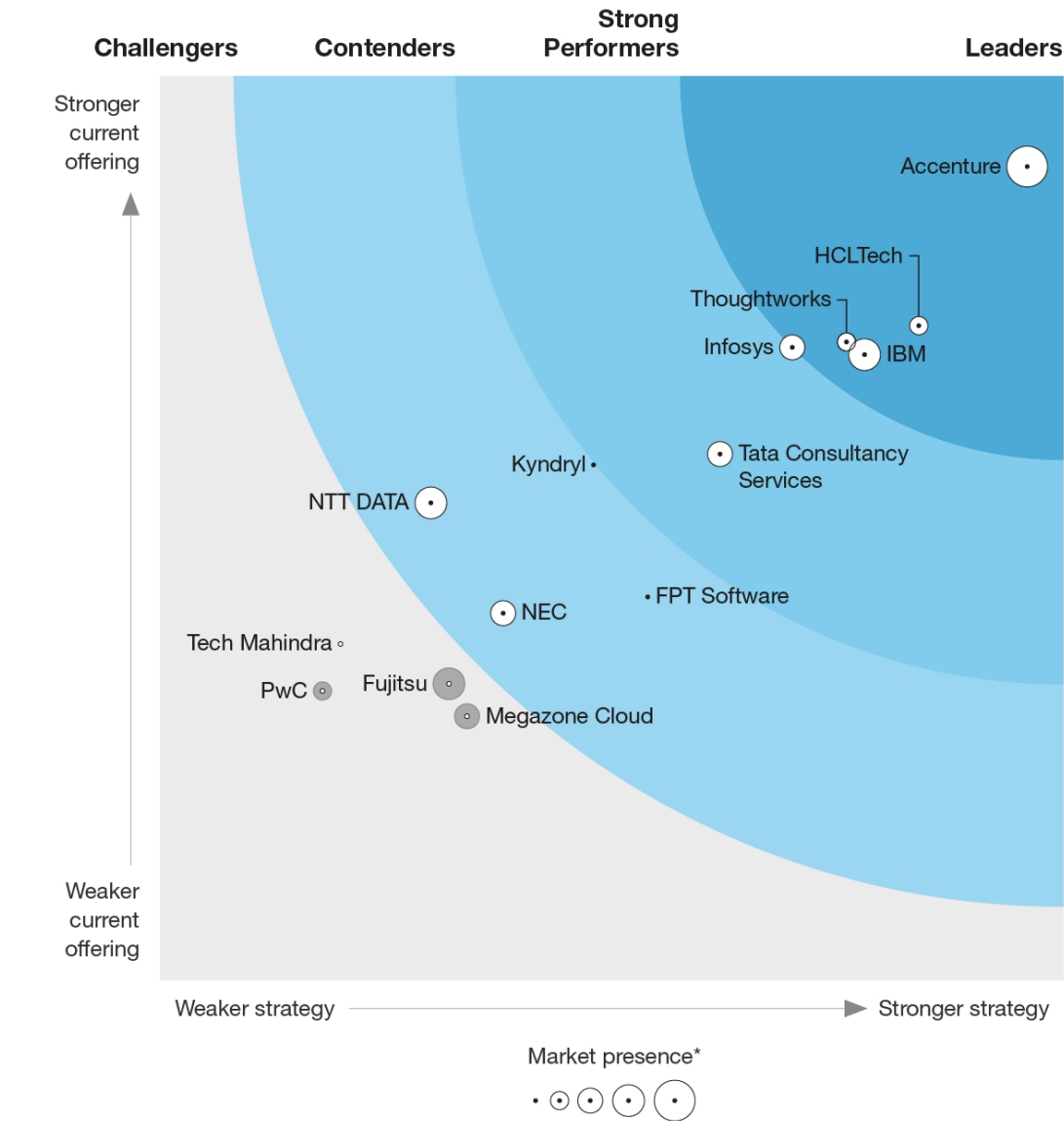
The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market; it doesn't represent the entire vendor landscape. You'll find more information about this market in [Now Tech: Cloud Migration And Managed Service Partners In Asia Pacific, Q2 2022](#) and about the corresponding market in China in [The Forrester Wave™: Cloud Migration And Managed Service Partners In China, Q4 2022](#).

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figures 1 and 2). Click the link at the beginning of this report on [Forrester.com](https://www.forrester.com) to download the tool.

Figure 1

Forrester Wave™: Cloud Migration And Managed Service Partners In Asia Pacific, Q4 2022

THE FORRESTER WAVE™
Cloud Migration And Managed Service Partners In Asia Pacific
Q4 2022



*A gray bubble or open dot indicates a nonparticipating vendor.

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Figure 2**Forrester Wave™: Cloud Migration And Managed Service Partners In Asia Pacific Scorecard, Q4 2022**

	Forrester's weighting	Accenture	FPT Software	Fujitsu*	HCLTech	IBM	Infosys	Kyndryl
Current offering	50%	4.50	2.12	1.64	3.62	3.46	3.50	2.85
Hybrid cloud support	20%	4.40	1.90	1.55	4.20	3.20	3.95	2.40
Service capabilities	35%	3.90	1.40	2.50	3.80	3.00	3.60	2.60
Quality enablers	10%	5.00	2.00	1.00	4.00	3.00	4.00	2.00
Personnel and organization	35%	5.00	3.00	1.00	3.00	4.20	3.00	3.60
Strategy	50%	4.80	2.70	1.60	4.20	3.90	3.50	2.40
Vision	25%	5.00	3.00	1.00	5.00	5.00	5.00	5.00
Execution roadmap	20%	5.00	5.00	3.00	5.00	5.00	3.00	3.00
Performance	20%	5.00	1.00	1.00	3.00	3.00	3.00	1.00
Supporting products and services	10%	5.00	0.00	0.00	3.00	3.00	3.00	1.00
Partner ecosystem	15%	5.00	3.00	3.00	5.00	3.00	3.00	1.00
Commercial model	10%	3.00	3.00	1.00	3.00	3.00	3.00	1.00
Market presence	0%	4.20	1.00	3.40	1.40	3.80	2.20	1.00
Revenue	40%	5.00	1.00	5.00	1.00	5.00	3.00	1.00
Number of customers	40%	3.00	1.00	3.00	1.00	3.00	1.00	1.00
Average deal size	20%	5.00	1.00	1.00	3.00	3.00	3.00	1.00

All scores are based on a scale of 0 (weak) to 5 (strong).

*Indicates a nonparticipating vendor

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		Forrester's weighting	Megazone Cloud*	NEC	NTT DATA	PwC*	Tata Consultancy Services	Tech Mahindra*	Thoughtworks
Current offering		50%	1.46	2.03	2.64	1.60	2.91	1.86	3.53
Hybrid cloud support		20%	1.20	1.15	2.40	1.35	3.05	2.15	2.35
Service capabilities		35%	1.40	3.00	3.10	1.70	3.00	1.40	4.00
Quality enablers		10%	1.00	4.00	3.00	1.00	2.00	1.00	4.00
Personnel and organization		35%	1.80	1.00	2.20	1.80	3.00	2.40	3.60
Strategy		50%	1.70	1.90	1.50	0.90	3.10	1.00	3.80
Vision		25%	3.00	1.00	3.00	1.00	3.00	1.00	5.00
Execution roadmap		20%	1.00	3.00	1.00	1.00	3.00	1.00	5.00
Performance		20%	1.00	1.00	1.00	1.00	1.00	1.00	3.00
Supporting products and services		10%	0.00	1.00	1.00	0.00	5.00	1.00	5.00
Partner ecosystem		15%	3.00	3.00	1.00	1.00	5.00	1.00	1.00
Commercial model		10%	1.00	3.00	1.00	1.00	3.00	1.00	3.00
Market presence		0%	2.60	2.60	3.40	1.80	2.20	1.00	1.40
Revenue		40%	1.00	1.00	5.00	3.00	3.00	1.00	1.00
Number of customers		40%	5.00	5.00	3.00	1.00	1.00	1.00	1.00
Average deal size		20%	1.00	1.00	1.00	1.00	3.00	1.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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Vendor Offerings

Forrester included 14 vendors in this assessment: Accenture, FPT Software, Fujitsu, HCLTech, IBM, Infosys, Kyndryl, Megazone Cloud, NEC, NTT DATA, PwC, Tata Consultancy Services, Tech Mahindra, and Thoughtworks.

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Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

- **Accenture's scale, broad capabilities, and deep partnerships are hard to match.**

Accenture takes a cloud-first strategy to deliver an integrated set of capabilities through its cloud factories across a continuum of services. The company has a clear roadmap for investing in and growing its cloud business. In 2021, it invested \$1.1 billion in assets, acquisitions, platforms, and partnerships and \$900 million in training. Accenture offers comprehensive support services for knowledge transfer, including both design and execution engagements. The company has broad and deep partnerships with global hyperscalers such as Alibaba Cloud and with the extended ecosystem of industry bodies.

Overall, Accenture's ongoing investments have strengthened its service delivery with assets, accelerators, and platforms. myWizard accelerates cloud service delivery and enables cloud management with automation capabilities; myNav offers a platform that includes in-house and third-party assets to support services ranging from strategy and assessment to operations. The company's cloud solutions, including cloud security, are tailored to the diverse needs of the APAC market. Accenture is a good fit for enterprisewide initiatives from strategy to ongoing operations. Customers that need to simplify the cloud journey story in complex or regulated industries will value Accenture's balance of technical and business acumen.

- **HCLTech leverages its heritage skills to provide hybrid cloud operations.** Known for its strong IT outsourcing services, HCLTech (formerly HCL Technologies) is a significant player in cloud migration and modernization services. The company dedicates cloud ecosystem business units to leading hyperscalers and has an established partnership with Google. However, it is primarily an Azure player thanks to its deep product engineering partnership with Microsoft. To deliver its services, HCLTech uses a variety of homegrown best-of-breed methodologies and tools such as its FENIX modernization methodology, DRYiCE automation, and Advantage suite of productivity solutions. When focused on cloud migration and modernization, the company coordinates its vast array of intellectual property via its CloudSMART framework. It has been delivering on its vision with a clear roadmap that includes acquisitions in key APAC markets (e.g., DWS Group).

With its IT operations heritage, HCLTech emphasizes its engineering capabilities and has strong private cloud expertise. The company's cloud-native development

capabilities in the region have improved relative to other providers in this evaluation and in our global evaluation. While its other capabilities are not leading, they are well balanced across the cloud services lifecycle; cloud build and ongoing operations are key strengths. It has operated in APAC for decades, and its presence is extensive. Reference customers praised its technical acumen and ability to solve unexpected challenges. HCLTech is a good fit for enterprises looking to extend managed services support from other towers of service to cloud solutions, especially for those focused on Azure.

- **IBM is executing its hybrid cloud vision while offering deep industry support.**

IBM offers cloud migration and modernization services through the lens of hybrid cloud via its rebranded service arm IBM Consulting. The company's multicloud vision is for true interoperability among cloud platforms (rather than independent silos) built around individual hyperscaler platforms. This vision is differentiating — but now IBM has to deliver. IBM has a large certified professional services team and an extensive delivery network in APAC. The company's Research Labs have been at the forefront of innovation in cloud and related technologies, a situation strengthened by its acquisition of Red Hat in 2019. It has a superior vision and seeks to incorporate the latest trends from its own R&D into its service offerings. Since spinning off its infrastructure service business as Kyndryl, IBM has been broadening its hyperscaler capabilities via a combination of talent development and acquisitions. The company's well-regarded Garage method offers a co-innovation approach for customers by involving business experts and IT professionals.

Despite its scale, IBM lacks a differentiated Google Cloud partnership. Otherwise, it has robust capabilities across the region's major hyperscalers and its own cloud for industries like financial services. It can cover both business and cloud transformation and maintains its reputation for delivering extensive business value, even though no elements of the cloud services lifecycle stand out today. Reference customers praised its cloud advisory, migration, and modernization capabilities. IBM is a good fit for enterprises requiring diverse professional resources and global experience for enterprise-level cloud transformation.

- **Thoughtworks delivers high-impact technical expertise for transformative**

modernization. Since establishing its first international office in Australia in 1999, Thoughtworks has expanded across APAC and has more than 7,000 employees in the region, including a significant number in China. The company focuses on enabling customers' engineering teams to deliver business outcomes in areas of industry or market differentiation. This matches its vision to deliver impact for clients through collaborative and cocreative processes rather than arm's-length

services. Serving agile, DevOps, and software product transformations globally for more than 30 years, Thoughtworks also supports emerging development and delivery paradigms including cloud-native. The company's software engineering expertise, created by hiring technical specialists and talented developers, gives it some of the market's strongest modernization capabilities.

With its extensive training portfolio and significant development budgets, talent management is a key focus for Thoughtworks — evidenced by its large volume of open source contributions and published thought leadership. As a result, it has a breadth of capabilities to leverage both in-house and third-party software assets for service delivery with engagements beyond modernization to technically complex advisory and cloud builds. Although it can support major cloud platforms, it maintains a high level of cloud agnosticism — that is, no one partnership stands out. Reference customers praised its delivery capabilities on Amazon Web Services (AWS). Thoughtworks is a good choice for firms seeking to modernize legacy applications or development engineering capabilities for digital business delivery in multicloud environments.

- **Infosys offers strong solution services and private cloud capabilities.** Infosys' cloud services focus heavily on applications, with strong functional and vertical industry solution offerings supported by solid customer references. It delivers these and robust end-to-end cloud lifecycle offerings under Infosys Cobalt — a collection of services, solutions, and platforms powered by development and engineering assets and other elements of service delivery under a unified framework. The company is ramping up its strength in Google Cloud, but its activities with AWS and Azure are still slightly larger by customer count and revenue. It lacks support for Alibaba Cloud and supports only a small set of second-tier clouds.

What Infosys lacks in broader hyperscaler support, it makes up for with strong private cloud capabilities and experience across a wide variety of cloud-native technologies. The company leans on its existing install base, helping customers begin their hybrid cloud journey in safe hands. Although it has a systematic approach to service development and innovation, its network of labs focuses on broader emerging technologies, with less emphasis on cloud-related practices than others in this evaluation. Reference customers also noted this weakness but otherwise praised Infosys' technical implementation capabilities. Infosys is a good fit for most modernization and migration opportunities, especially application reimplementations in the banking sector and asset-intensive industries such as logistics.

Strong Performer

- **TCS is the Google Cloud leader but doesn't differentiate as strongly on specific services.** Tata Consultancy Services' cloud migration and modernization services are in its Business 4.0 vision, embracing cloud as the unifying digital fabric of the enterprise. The company sees cloud as key to building a "digital core" position alongside highly automated and mass-customized transformation services. Having long been aggressive in intelligent automation, TCS brings its Machine First operating model to bear on managed cloud services, arguing that failure to trust AI and other intelligent automation inevitably yields an "agility debt." TCS has one of the largest ecosystems in APAC, with more than 300 entities in its co-innovation network of major hyperscalers, technology partners, open source bodies, standards organizations, and academic institutions. It has the broadest and deepest Google Cloud capabilities and solid delivery across other major hyperscalers, with the exception of Alibaba Cloud.

TCS' history of operational prowess and stated desire to reimagine industry value chains by creating borderless business enterprises on the cloud is corroborated by reference customers, who gave TCS high marks for advisory, build, migration, and modernization. They also valued the company's collaborative partnership approach, shared goals and vision, and commitment to deliver. TCS is a good fit for enterprises looking for a provider with balanced application and infrastructure strengths, especially those seeking to align with the company's vision of highly connected global commerce.

Contenders

- **Kyndryl has a global vision and large talent pool but has yet to prove itself in key areas.** Kyndryl is the result of IBM's divestment its IT managed services business and is now free to make its own ecosystem choices. In the 12 months after the split, Kyndryl closed an increasing array of cloud ecosystem agreements and is cocreating with partners (e.g., the joint innovation lab with Microsoft explores modernization use cases on Azure). It now has more than 10,000 cloud certifications in APAC from global hyperscalers and Alibaba Cloud. Kyndryl has a global delivery network and resource pool that rivals some of the leaders in this evaluation. However, much of its capacity and demonstrated capability remains centered on IT operations and private cloud.

Kyndryl is organized to deliver end-to-end cloud migration and modernization services but has yet to demonstrate progress against its vision and roadmap. The company dedicates alliance teams to each hyperscaler and can deliver services based on its own cloud management tool. It also has broad capabilities to use

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hyperscalers' native tools and third-party solutions where needed. Reference customers were moderately satisfied with Kyndryl's services but also understand that the company is finding its footing as a standalone entity. Kyndryl is a good fit for existing customers that are building a hybrid cloud strategy with diverse best-of-breed solutions from the global market.

- **FPT Software delivers on cloud build and management but lacks partnership**

breadth. A Vietnamese export success story 20 years in the making, FPT Software was built by technical specialists who became entrepreneurs. Beginning with traditional development outsourcing, the company has expanded into cloud-enabled digital transformation in the past decade, with more than 35,000 employees worldwide. It supports delivery with its Japanese-inspired Digital Kaizen method and a cohesive, well-structured set of in-house developed tools under the "aka" brand, including the akaCloud platform for multicloud management, monitoring, and cost optimization across AWS, Azure, and Google Cloud Platform (GCP). FPT Software has an impressive future roadmap and evidence that it has successfully delivered on its previous intentions.

FPT Software promotes customer-centricity as a core company value and invests heavily in local talent through its digital academies. The company has a narrow set of hyperscaler partners (AWS, Azure, and GCP). Reference customers stay with FPT Software for the long haul and applaud the quality of the company's Azure practice and expertise of its personnel. Despite investing in local data center capacity, its private cloud experience still lags others. FPT Software's cloud services capability outside of foundational technology is also relatively weak, but it has solid cloud build and management capabilities. FPT Software is a good choice for Azure organizations with a large Microsoft application portfolio or those seeking a partner that can engineer a technically robust and secure cloud landing zone.

- **NTT DATA offers solid hybrid cloud managed services but should bolster cloud-**

native. NTT DATA has benefited from its significant capabilities in infrastructure and application management and made a series of acquisitions to bolster its cloud, automation, and analytics capabilities. The company may lack the scale of some larger players globally, but it has a clear vision for managed hybrid cloud services and for expanding its capabilities in the APAC region. NTT DATA retains a strong appreciation for classic application modernization, although this strength comes through advisory services rather than hands-on development in APAC. The company has robust support for Alibaba Cloud despite the fact that much larger firms also focus on the Chinese hyperscaler.

NTT DATA is primarily an AWS player with a secondary concentration on Azure.

Roughly half of its commercial activity in managed cloud services is in APAC — unsurprising for a firm based in Japan. The company has operations in more countries than its Japanese counterparts, giving it more reach. It provides an end-to-end set of tools, but capabilities are not that broad or deep as other firms we evaluated. However, NTT DATA's systematic talent development model means that it has some of the most qualified cloud experts in Japan. Reference customers expressed some concerns about cloud-native capability and price but were otherwise satisfied with its services. NTT DATA is a good fit for companies focused on migration and modernization and those looking for application support to tackle vertical-specific challenges.

- **NEC is a strong technology provider, but its regional cloud services are less proven.** NEC's cloud migration and modernization services reflect its historic strength as a product company with a reputation for technology innovation. The company designs and operates hybrid cloud solutions that enable digital transformation in the region's more mature markets. Azure drives most of its hyperscaler-related services, but its Google Cloud capabilities are on par with its AWS offerings. NEC has developed strong, if somewhat niche, advisory capabilities targeting government and social enterprises. The company has well-developed hybrid cloud management using its own cloud management tools and the ability to leverage hyperscalers' native tools and third-party solutions where needed.

NEC has one of the smaller teams of professionals in the APAC region but constrains itself to Japan, Australia, Singapore, and India, where it acts as a specialist and sometimes a partner of larger providers. The company boasts some significant client logos and case studies, all of which involved hybrid requirements and specialized network or technology expertise. Reference customers were only moderately satisfied with the services overall, noting great technical capability but expressing concerns about engagement management. Midsize government agencies or enterprises with complex technical edge or network environments seeking to move to hybrid cloud will benefit from NEC's specialized knowledge.

Challengers

- **Fujitsu is expanding from a solid regional foundation but must strengthen AWS support.** A large Japanese IT services firm with international operating units, Fujitsu has recently set its sights on becoming a global company with a Japanese headquarters. To serve this ambition, it created a new APAC delivery operation supported by a global enablement function called Uvance. Fujitsu has also clarified its hybrid cloud strategy and sharpened its industry focus with unique

capabilities in public safety and defense. The company's scale is on par with most large global players and exceeds that of its Japanese compatriots; it now needs to make the most of this. Fujitsu's history of end-to-end traditional IT outsourcing services means that it understands and commits to services throughout the cloud migration and modernization lifecycle.

Fujitsu was late to partner with major hyperscalers; as a result, its AWS and GCP capabilities are below par compared to other service providers. However, the company's three acquisitions in the region — its first in over a decade — suggest a clear strategy to address capability gaps, although both Versor and Oobe are Azure-focused. Mission-oriented government agencies and enterprises with heterogeneous legacy systems and complex business needs requiring customization can leverage Fujitsu's proven strength in integration services. Fujitsu declined to participate in the full Forrester Wave evaluation process.

- **Megazone Cloud leads for AWS and Google Cloud in East Asia but must expand further.** In 2018, Megazone Cloud spun off from the web agency and hosting services provider that had been its parent company for more than 20 years. Prior to the separation, the platform services business unit had established itself as South Korea's first Google software-as-a-service (SaaS) partner and a founding partner of AWS in 2012. Recent capital raises of close to \$200 million and a solid vision of how the market is evolving has the potential to make the firm a significant player in the region. Megazone Cloud is the cloud managed services partner of some of South Korea's most recognized brands, including Hyundai Motor Group and Samsung Electronics. It has established service and support centers in North America to deliver its flagship cloud operations and maintenance services.

Megazone Cloud's web hosting and internet commerce pedigree is obvious in its focus on SaaS-delivered business applications and cloud operations. The scale and variety of the South Korea-headquartered marquee customers that use Megazone Cloud is impressive, but the firm has not developed advisory, build, migration, or modernization capabilities that are as broad or deep as others in this evaluation, preferring to focus on data strategy architecture and design and provide analytics using cloud-based AI/machine learning services. Megazone Cloud declined to participate in the full Forrester Wave evaluation process.

- **Tech Mahindra offers technical expertise but at the cost of a broader service offering.** Tech Mahindra has a history of strong application development, testing, and delivery services but does not appear to have translated this into a significant cloud migration or modernization business in the region, often promoting its workplace as a service on par with its cloud-native development capability. The company has a consistent go-to-market approach with peers and is strong in

industries like media and manufacturing. However, it does not always appear to clearly connect to a value proposition that is customer-centric and oriented toward business outcomes. Tech Mahindra's talent strategy appears focused on building technical competencies rather than helping to shift the culture by acting as a more consultative partner. This may change in the future with the more focused NXT.NOW strategy.

Like other technically oriented systems integrators, Tech Mahindra wants to build a more holistic set of services and move away from traditional operations services to design-led transformation. Its iCOPS platform remains a key offering, providing a unified view across hybrid multicloud operations for seamless operations and lower costs. Tech Mahindra is a good fit for existing customers or those with engineering or industrial use cases for which the company has a strong background and DNA — especially those involving 5G. Tech Mahindra declined to participate in the full Forrester Wave evaluation process.

- **PwC is a trusted partner but could make more of its application modernization capability.** PwC bases its brand on trusted client relationships and the business acumen to deliver to expectations. The company's BXT (business, experience, and technology) methodology remains the backbone of much of its business consulting, application services, and cloud delivery. PwC has a reasonable scale and capability in APAC, and the potential to combine this with its strong SaaS application delivery practices is compelling. However, it remains biased toward cloud advisory, builds, and migrations. Like most of its peers, the company focuses on AWS and Azure but has the potential to differentiate on GCP, for which it has a solid foundation. PwC is better known for its outcome-oriented contracts than many of its peers in this evaluation.

PwC has chosen not to address the private cloud market. Although it has a cloud-native engineering model, it's unclear what the associated value proposition is given the intentional lack of hybrid support. The company has operations in all major economies, giving it significant reach. Although PwC has developed a broad suite of tools, these are foundational; this could be a result of the firm being risk-averse and favoring predictability over innovation. Organizations operating in complex regulatory environments or focusing on a SaaS-centric replacement strategy will benefit from its expertise. PwC declined to participate in the full Forrester Wave evaluation process.

Evaluation Overview

We evaluated vendors against 27 criteria, which we grouped into three high-level categories:

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- **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include multicloud support, service capabilities, quality enablers, and personnel and organization.
- **Strategy.** Placement on the horizontal axis indicates the strength of each vendor's strategy. We evaluated vision, execution roadmap, performance, supporting products and services, partner ecosystem, and commercial model.
- **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's revenue, number of customers, and average deal size.

Vendor Inclusion Criteria

Forrester included 14 vendors in the assessment: Accenture, FPT Software, Fujitsu, HCLTech, IBM, Infosys, Kyndryl, Megazone Cloud, NEC, NTT DATA, PwC, Tata Consultancy Services, Tech Mahindra, and Thoughtworks. Each of these vendors:

- **Was included as a large or midsize provider our Now Tech report or has an APAC HQ.** We included providers named in our [Now Tech: Cloud Migration And Managed Service Partners In Asia Pacific, Q2 2022](#) report as a company with more than \$55 in annual revenue from cloud migration and managed services in APAC or that has its headquarters in the region.
- **Gains a significant share of its global business revenue in APAC.** We included providers that have a strategic business focus on APAC, demonstrated by earning more than 10% of their annual category revenue in the region.
- **Is either a systems integrator or a pure-play cloud services firm.** We included providers that are not cloud platform providers.
- **Has significant interest from clients or regular mentions in competitive situations.** We included providers that Forrester's clients ask about most frequently in APAC and which are also regularly mentioned by partners and competitors.

Supplemental Material

Online Resource

We publish all of our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers

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to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by August 10, 2022 and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ And New Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

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