



capioIT

Salesforce.com Asia
Pacific Systems Integration
and Services Providers
Capture Share Report -
2020

FOCUS POINTS

- > At the global level, Salesforce is the benchmark SaaS and Customer Experience platform. In 20 years, it has gone from upstart to benchmark. As quarterly financial results consistently highlight, it is still building momentum.
- > In the Asia Pacific region, it is still the benchmark SaaS, but it is still a long way from saturation. Despite the smaller scale to Europe and North America, the customer experience, business outcomes, and engagement are comparable to the global customer base.
- > Historically, the key Asia Pacific markets are Australia and Japan. Salesforce had not localised enough in the region, despite Asia not being far from homogenous. This has changed with country infrastructure and management. Salesforce alongside customers and partners are benefiting from the localised approach. Other global SaaS providers need to take note of this.
- > Whilst globally and in the Asia Pacific, Salesforce offers much more than just CRM in the cloud, for some prospects, customers, markets and industries in the Asia Pacific, there is still the perception that it is merely a CRM provider. As Salesforce drives localisation, the perception will increase. Still, it needs to highlight the breadth of the customer experience it provides, and the other mid and back-office capabilities it can engender.
- > The Salesforce SI market in the Asia Pacific is structured similarly to the global market. Acquisitions have reduced the number of mid-sized integrators which are essential to driving growth. There are significant delivery capabilities in the region, and Indian vendors that are notionally headquartered here, but more local providers are crucial to driving growth. This is particularly true to ensure localisation. China, Thailand, Australia and others all have strong local providers, but many are sub-enterprise scale, and act as a subcontractor, or to provide specific skillsets. Simply, more of these are needed.
- > A key observation from the global analysis that equally applies to customers of Salesforce in the Asia Pacific region is the question of not "If Salesforce" *but* "how Salesforce" is used in the organisation. Alongside the other major cloud platforms such as AWS, Google and Microsoft Azure, it is driving the shift to cloud that has accelerated in 2020.
- > It is hard to find a poor Salesforce integration partner. Accenture has leadership in the Asia Pacific Salesforce SI and Services Providers market. This follows the global report trends. The competition is increasingly broadening the capability. Deloitte and PwC follow Accenture in capability, and the leaders are completed with Wipro Appirio, Infosys and Capgemini. These results are similar to the global analysis. Still, when the analysis is undertaken, there are a lot of discrete variations that need to be applied to the local market, reinforcing the view that the Asia Pacific is not homogenous, and never will be.
- > capioIT included 13 vendors in the study. Unfortunately, due to the acquisitive nature of the market, only one vendor, Beryl8, is an Asia Pacific focused System Integrator.

HOW CAPIOIT MEASURES VENDOR CAPABILITY IN THE ASIA PACIFIC SALESFORCE.COM 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 objective, market-based analysis of 17 key capabilities and attributes of selected services providers.

These attributes are focused in two key areas, Transform and Leverage. Transform in simple terms is the ability of a vendor to engage and create processes and more substantial measurable business outcomes for clients. Leverage is focused on the ability to work in a broad, integrated ecosystem and provide scale to the creation and measurement of client outcomes.

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

Clearly, data and process integrity are a critical component 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 a range of sources to ensure a range of opinions. Sources of information include buyers of Salesforce services and solutions in the Asia Pacific region, 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.com	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%
Total		100%

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.com ecosystem	15%
Asia Pacific Solution Development	Development of portfolio offerings that are Asia Pacific region based 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.com Platform Implementation	Investment in Salesforce.com platforms and related services	20%
Strength of Brand	Reputation and credibility of the brand in the local and regional marketplace	12%
Ability to influence the external market	Strength of the provider to create market awareness and influence	8%
Total		100%

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.

RANKING THE ASIA PACIFIC SALESFORCE.COM SYSTEMS INTEGRATION AND SERVICES PROVIDERS

Whilst the Salesforce capabilities within the global SI's have grown substantially; there is still plenty of growth in the Asia Pacific market at a macro and country/offering level. It is undoubtedly a "cool" market for SI and services vendors; however, it still far from maturity in the region and globally. At the moment, the SAP, Microsoft and Oracle markets are more extensive.

Consolidation now is much more pointed based on geography. There are limited mid-sized acquisition targets now, so the focus is on strategic offerings or geographic providers, e.g., the 2020 acquisition of Simplus by Infosys, increased consolidation in both Australia and the Quote to Cash functionality. It is important to note that Simplus only acquired Australian based SquirePeg in 2019. There will be more acquisitions to come, capioIT is aware on a regular base of attempts to consolidate. Some fall aside due to factors for both acquired and acquirer (usually price of course), but the direction is clear.

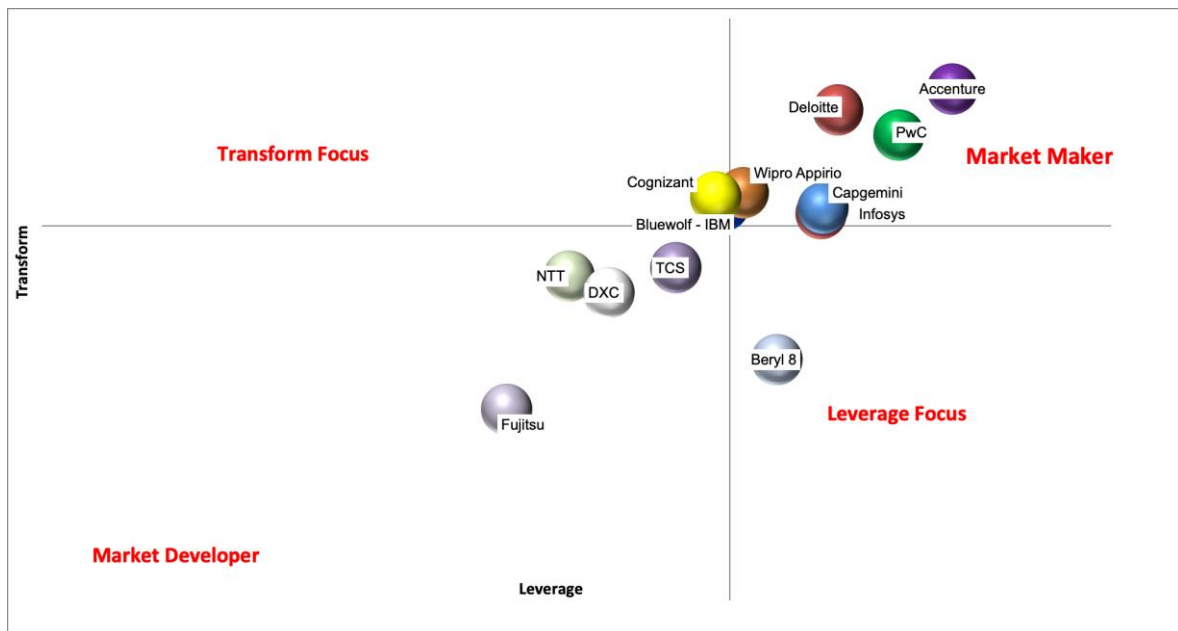
capioIT carefully selected 13 significant providers in the Asia Pacific salesforce.com Systems Integration and Services Providers to undertake a Capture Share addressing the competitive environment of the Asia Pacific salesforce.com Systems Integration and Services Providers marketplace. For more details on the Capture Share methodology, please see Appendix 1.

The following vendors were included in the analysis:

- Accenture
- Beryl 8
- Bluewolf - IBM
- Capgemini
- Cognizant
- Deloitte
- DXC
- Fujitsu
- Infosys
- NTT
- PwC
- TCS

- Wipro Appirio
- Bluewolf-IBM
- Capgemini
- Cognizant
- Deloitte
- Infosys
- NTT
- Persistent
- PwC
- Slalom
- TCS
- TechMahindra
- Wipro Appirio

The chart below highlights the Capture Share results. Accenture has maintained leadership based on scale and reach as well as functionality. It is no surprise that the top three are outcome orientated consulting firms. In short, their key differentiation is more than the scale of their capacity. It is the depth of their relationship with client executives to provide digital transformation based on cloud platforms.



Deloitte and PwC continue to provide the most vigorous competition and positioning to Accenture in the Asia Pacific, as they do at the global level. What allows these three vendors to stand out, is their depth of relationships, at the country regional and international levels. They have a consistency in their approach and relationships that are at the highest level of leadership, enabling outcomes for clients. For example, Deloitte and PwC can explicitly advise and support government policy in key markets in the region.

Following the major consulting firms are Infosys, Wipro and Capgemini. Infosys and Wipro have leveraged global delivery with acquisitions, Capgemini has great strength in the markets it targets. In simple terms, there are no bad vendors this applies at the global and regional level. It also applies in most country-based providers, even those not included in the study. Rest assured, all vendors included in the analysis have strong capabilities and are investing in the platform. That is part of the capioIT methodology. If you make the Capture Share shortlist, you are capable.

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, and so on.

Vendors Rated as Market Maker

- Accenture
- Deloitte
- PwC
- Wipro
- Cognizant
- Infosys
- Capgemini

Vendors Rated as Transform Focus

- Cognizant
- IBM

Vendors Rated as Leverage Focus

- Beryl8

Vendors Rated as Market Developer

- TCS
- DXC
- NTT
- Fujitsu

In terms of leadership in the Capture Share report, Accenture is the outright leader in five of the attributes and joint leader in eight others. It has leadership in 13 of the 17 attributes. It has been ranked as the leader in all previous versions of this analysis from 2014.

In prior years Accenture has had up to three times the number of certified Salesforce resources of the competition globally and in the Asia Pacific region. In the Asia Pacific

region with the global delivery capabilities enjoyed by most of the vendors, this is less of an issue. Where resourcing matters is in-country, the ability to deliver in emerging markets such as Indonesia, Taiwan and others. The number of certified consultants highlights the ability to provide solutions at scale and is a very significant determinant of the leaders from

Cognizant and IBM are ranked as a Transform focused vendor. Both are capable providers, in the markets they offer services; they are important providers and provide innovative solutions.

Beryl8 is a unique provider and ranked as a Leverage focus. It is the only market-based provider (based in Thailand). They are the go-to provider for the Thai market and hopefully will emerge in future years as an ASEAN based leader.

The remaining vendors are Market Makers. Whilst they have had varying stages of maturity in Salesforce solutions, all are investing, some such as DXC have used acquisitions in Australia to lead growth. As has been proven by Wipro and Infosys, it is possible to build capability organically and inorganically to enter the higher levels of the leadership rankings. Most of the vendors in the Market Maker space can shake the broader leadership from a vendor perspective. Key to this is going to be a significant relationship with Salesforce itself and inorganic growth. It is also essential to consider that leadership in Salesforce solutions is essential to have a leadership position in the overall As a Service market.

The following charts highlight the overall rankings and average scores for the two transform and leverage capabilities.

Vendor	Average Transform Score
Accenture	8.1
Deloitte	8.0
PwC	7.8
Wipro Appirio	7.5
Cognizant	7.4
Bluewolf - IBM	7.4
Capgemini	7.4
Infosys	7.3
TCS	7.0
NTT	7.0
DXC	6.9
Beryl 8	6.5
Fujitsu	6.2
Average	7.2

For the Transform capabilities, seven of 13 vendors were ranked as above average, with the remainder below the average. The three highest-ranked providers from a transformation viewpoint are Accenture, Deloitte, and in equal third place, PwC and Bluewolf (an IBM company). All are innovative and transformative enterprises and have made significant global, regional and country investments in applications services across varied platforms. Other leaders in the transform category include Capgemini, Wipro Appirio and Infosys.

The rest have ground to make up in the Transform capability to ensure that their clients are gaining the most substantial business outcomes from investment in the Salesforce platform. The more complicated and mature the ecosystem around Salesforce becomes, the more difficult this will be to achieve. Transforming client outcomes and success has to be the priority if vendors are to be able to convince prospects that they have differentiated capabilities in Salesforce.

Vendor	Average Leverage Score
Accenture	8.0
PwC	7.8
Deloitte	7.6
Capgemini	7.6
Infosys	7.6
Beryl 8	7.4
Wipro Appirio	7.3
Bluewolf - IBM	7.2
Cognizant	7.2
TCS	7.1
DXC	6.9
NTT	6.7
Fujitsu	6.5
Average	7.3

For the leverage characteristics again, 7 of the 13 vendors scored above the average, and seven below. The contrast with the transform attributes confirms the split in the market. Scale is significant, but to be genuinely differentiated and centred on client outcomes, the focus has to be on transforming the client experience. Accenture lead, followed by Deloitte, Wipro and PwC follow. Accenture's gap at the head of the line has reduced slightly in recent years.

The average rating for each of the attributes is in the following table. Again, this analysis highlights that there is an opportunity for differentiation by providers that are not being leveraged. Not surprisingly, the attributes that lag the average to the greatest extent reflect the difficulties in overcoming the incumbent leaders such as Accenture, Deloitte and PwC.

The ability to influence the market is the lowest rated, reflecting the strength at the top. This is followed by the perennial challenge of Country Solution Development and the

power of the Brand. Localising Salesforce is a priority across the ecosystem. The internal R&D is a concern, it is just on the average, and to enable more substantial transformation capabilities, this needs to become a key investment platform for leaders and challengers alike.

On the positive, it is not surprising that partners have been successful in leveraging Salesforce R&D, as well as the broader Salesforce ecosystem. The Salesforce ecosystem is so critical to the success of the platform.

In this year’s study, the leverage rankings highlight a significant issue. There is one attribute that leads all others. It is the only attribute above the weighted average. Customer Satisfaction. It just reinforces how significant Customer Satisfaction is, to drive capability, customer experience and outcomes from investment in Salesforce for the integrator and the customer perspective. Whilst in many cases, the other attributes are just below the average, the split in the market is one that is not sustainable. Customer Satisfaction cannot be maintained without investment in adjacent capabilities such as resources, delivery partnerships and of course solution depth.

These findings reinforce the issue of skills in the marketplace. Leaders do not rely on Salesforce to lead the way in skills development. They are proactive in driving the capability themselves.

Average Leverage Attribute Score	Score
Customer Satisfaction	7.6
Solution Portfolio Depth	7.5
Certified salesforce.com skills	7.2
Country Strength	6.8
Sales Team strength	7.3
Delivery Partnerships	7.2
In Country Geographic Reach	7.2
Country localisation	6.7
Average	7.3

The average Transform attribute also shows a wide variation in capability. Not surprisingly, influence is incredibly hard to manufacture.

Average Transform Attribute Score	Score
Internal R&D	7.3
Leverage salesforce.com R&D	7.3
salesforce.com Ecosystem Partnership	7.5
Asia Pacific Solution Development	7.2
Industry Solution Development	7.3
Country Solution Development	7.2
salesforce.com Platform Implementation	7.4
Strength of Brand	6.9
Ability to influence the external market	6.8
Transform	7.2

Not surprisingly, Accenture leads the way in AWS leads the market in 13 of the 17 attributes. For two of these attributes, it stands alone at the top of the rankings. Local Thai provider Beryl8 highlighted the importance of local capabilities by standing alone for three of the criteria; all focused on localisation and partnerships.

Following Accenture, Deloitte, PwC and Beryl8 are the leaders in the individual attributes.

Note - Due to the measurement of leadership in the market, multiple vendors can share leadership in the market. 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 the equal leaders in the market.

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

Customer Satisfaction	Accenture, Capgemini, Cognizant, Deloitte, DXC, Infosys, PwC, Wipro Appirio,
Certified Salesforce.com Skills	Accenture
Solution Portfolio Depth	Accenture, Bluewolf (An IBM Company), Capgemini, Cognizant, Deloitte, Infosys, PwC, TCS
Overall Country Strength	Accenture, Deloitte, Wipro Appirio
Sales Team Strength	Accenture, Deloitte,
Delivery Partnerships	Beryl8
In Country Geographic Reach	Beryl8
Country localisation	Beryl8

Transform Attribute	Top Ranked Vendors
Internal R&D	Accenture, Deloitte, PwC
Leverage Salesforce.com R&D	Accenture, Cognizant Deloitte,
Salesforce.com Ecosystem	
Partnership	Accenture, Beryl8, Cognizant, Deloitte, PwC
Asia Pacific Solution Development	Accenture, Deloitte, PwC
Industry Solution Development	Accenture, Deloitte, PwC
Country Solution Development	Beryl8, Bluewolf (an IBM Company), DXC
Salesforce Delivery Platform	Accenture,
Strength of Brand	Accenture, Deloitte
Ability to influence external market	Accenture, Deloitte

WHAT ATTRIBUTES DO LEADERS IN THE ASIA PACIFIC SALESFORCE.COM SYSTEMS INTEGRATION AND SERVICES PROVIDERS SHARE

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

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

CHARACTERISTICS OF THE MARKET MAKER RANKED PROVIDERS

Accenture

Accenture remains the number one provider in the Asia Pacific Salesforce Services and SI market. This follows a similar position it enjoys globally. Acquisitions and organic investment have driven this. In the Asia Pacific region, it has the scale, breadth of relationships and coverage that result in leadership in the market.

It has carried the strong global salesforce relationship to the Asia Pacific region as well, supporting Salesforce's push to localise in the region.

Top three Salesforce solutions capabilities

- Strength of Brand
- Certified Salesforce resources
- Sales Team Strength

Deloitte

Deloitte Digital started in Australia, and that strength and vision have permeated the region. It has focused on providing a Digital First approach to clients and the integration of Salesforce solutions across the ecosystem. It is also able to leverage an end to end capability for clients at the most senior levels of the client organisation.

Top Three Deloitte Capabilities

- Sales Team Strength
- Delivery Partnerships
- Leverage salesforce.com Ecosystem Partnerships

PwC

PwC leverages the capabilities it offers to the enterprise, such as risk and strategy to engage in significant projects for enterprise clients in SAP. It is increasingly investing capacity and resources in the broader front office ecosystem led by Salesforce.com. It leverages PwC breadth to have customer references spread across multiple Asia Pacific geographies, helping support new geographies for Salesforce.

Top Three PwC Capabilities

- Solution Portfolio Depth
- Industry Solution Development
- Salesforce Ecosystem Partnership

Wipro-Appirio

Wipro has successfully leveraged the Appirio process and the Wipro strength in the Asia Pacific market to strongly position capabilities in the region. The scale of resources available is significant, and customer satisfaction has been maintained. Recent acquisitions will be able to be leveraged in the region in 2021, further boosting it.

Top Three Wipro Appirio Capabilities

- Customer Satisfaction
- Country Strength
- Salesforce.com platform implementation

Capgemini

Capgemini has developed strong capabilities in key industries and geographies across the Asia Pacific region. It has strength in maximising capabilities with limited resources.

Top Three Capgemini Capabilities

- Customer Satisfaction
- Solution Portfolio Depth
- Sales Team Strength

Infosys

As it has at the global level, Infosys has been making steady increases in the Salesforce ecosystem at the Asia Pacific level. The Simplus acquisition allowed greater access to Australia through the legacy of SqaurePeg. It can leverage strong customer satisfaction and to leverage the global delivery strengths of Indian based capabilities.

Top Three Infosys Capabilities

- Customer Satisfaction
- Leverage Salesforce.com R&D
- Industry Solution Development

APPENDIX 1 - METHODOLOGY FOR THE CAPTURE SHARE ANALYSIS

Capture Share reports are based on the analysis of 17 key capabilities and attributes of services providers. These attributes are focused in 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 for the Transform and Leverage capabilities.

Clearly, data and process integrity are a critical component 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 a range of sources to ensure a range of opinions. Sources of information include Salesforce.com, Salesforce.com

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 a range of organisations capture and understand emerging digital technology in emerging markets of the global economy. CEO Phil Hassey has over 20 years' experience in corporate strategy, consulting and market intelligence, gained in a diverse range of 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 engagement with their customers.
- **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

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