

MARKET NOTE

PricewaterhouseCoopers Analyst Day 2025: Driving Transformational Outcomes with Microsoft Solutions

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EXECUTIVE SNAPSHOT

FIGURE 1

PricewaterhouseCoopers Driving Transformational Outcomes with Microsoft Solutions

PricewaterhouseCoopers (PwC) held its 2025 Asia/Pacific Analyst Day in Singapore on August 6, 2025 and presented a wide range of updates across its Microsoft technology services business. The session also included clients from Southeast Asia, India, and Australia discussing their engagement with the firm and its partners.

Key Takeaways

- Microsoft is encouraging its partners to rethink how clients harness their solutions. PwC showed strong evidence of delivering Microsoft's vision, going beyond traditional advisory and positioning itself as a co-innovation partner for clients.
- The collaboration between PwC and Microsoft exemplifies how modern security platforms, such as Microsoft Sentinel, are transforming traditional security operation centers (SOCs) into AI-powered, unified threat management hubs.
- PwC works together with Microsoft's professional services team to deliver successful security information and event management (SIEM) migration and overall cybersecurity transformation.
- PwC's agent OS was spotlighted as the foundation for its agentic AI strategy. PwC's agent OS positions itself as an orchestration layer that enables enterprises to build, deploy, and govern AI agents across multiple functions and workflows.
- PwC showcased how its GenAI factory and cloud-native platforms are transforming enterprise workflows across consumer markets and global reporting.

Source: IDC, 2025

IN THIS MARKET NOTE

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Rather than write an exhaustive review of the entire event, IDC chose to share the top learnings of IDC analysts who attended the event. Those who want to learn more about IDC's impressions of the event can get in touch with IDC.

IDC'S POINT OF VIEW

Driving Transformational Outcomes Through Microsoft's AI Stack

According to Rijo George Thomas, senior research manager on IT Services, IDC Asia/Pacific, "As Microsoft continues to anchor its offerings around AI, significant disruptions are taking place within its partner ecosystem. Microsoft is encouraging its partners to rethink how clients harness their solutions to deliver tangible business outcomes, tailor solutions for industries, and build capabilities to reshape business processes with AI. The expectation is for traditional partners to innovate, go beyond software or infrastructure resale/implementation, and actively develop new solutions with Microsoft's AI technology stack. PwC showed strong evidence of its ongoing efforts to align with Microsoft's vision, combining PwC's deep knowledge of Australia, India, and Southeast Asia markets to build localized solutions for customers. Additionally, the PwC team showcased strong customer references across its target industry sectors for Microsoft-led opportunities, which include financial services, consumer services, manufacturing, healthcare, and public sector."

Thomas adds, "PwC's Microsoft practice is also taking a targeted approach to work with clients trying to decouple key business applications from their core SAP enterprise resource planning (ERP), enabling greater agility and lower operational cost. As part of these efforts, PwC has introduced its SAP plus offerings, designed to complement an enterprise's SAP core with Microsoft business applications and Power Platform solutions, including its offerings to extend the AI innovations of SAP systems with Microsoft Azure AI Foundry and Copilot solutions. IDC believes two-tier ERP models are growing in the Asia/Pacific (including Japan) (APJ) region as enterprises look to build composable application architectures for greater agility. PwC's offerings are well placed to help enterprises progress in this journey."

Security as the Strategic Enabler for Enterprisewide AI Adoption

Yih Khai Wong, senior research manager on cybersecurity, IDC Asia/Pacific, says "The collaboration between PwC and Microsoft exemplifies how modern security platforms, such as Microsoft Sentinel are transforming traditional security operation centers (SOCs) into AI-powered, unified threat management hubs. PwC's industry-specific security approach toward AI-driven automation, a unified security platform approach, and a secure-by-design framework reflects the evolution to a modern and automated approach from traditional security tools. According to IDC's *2025 Asia Pacific Security Survey*, 29% of organizations in the region are looking to adopt secure-by-design principles for new digital initiatives across hybrid cloud/multicloud environments, whereas 26% are looking to move toward an integrated security platform for operational simplicity and cost-efficiency."

Wong adds, "PwC's industry-specific security approach toward AI-driven automation and a secure-by-design framework reflects a growing opportunity to help strengthen security posture across the region. As enterprise AI adoption accelerates, the ability to secure data, identities, and operational technology (OT) environments will define the success of these AI initiatives. PwC's risk advisory-led approach and Microsoft's security platform capabilities offer organizations a blueprint into transitioning from security as a compliance checkbox to a business enabler."

Illustration of Modern, AI-Driven Security Information and Event Management

Cathy Huang, senior research director, IDC Asia/Pacific, says "The half-day event covered a considerable amount of cybersecurity-related content, including a live demo of AI-assisted phishing triage solution, and a cybersecurity transformation case study, with detailed discussions with the group chief information security officer (CISO) from the client organization."

She adds, "The customer case is a great illustration of modern, AI-driven security information and event management (SIEM) and PwC's security specialization for Microsoft solutions, given the choice of Microsoft Sentinel, is a primary deciding factor. PwC works together with Microsoft's professional services team to deliver a successful SIEM migration and overall cybersecurity transformation. The client was so satisfied with the outcomes that it committed to expand the scope to its operational technology (OT) environment, a significant vote of confidence in the platform's effectiveness and PwC's related expertise in supporting one of the region's largest conglomerates across its diverse business portfolio spanning energy, power, mining, and manufacturing sectors. The client organization plans to develop a massive OT cyber-experience center as its next major cybersecurity milestone."

PwC's Agent OS: The PwC-Branded Agentic AI Control Plane for Operational Transformation

Lawrence Cheok, associate research director on digital commerce and marketing, IDC Asia/Pacific, says "At its Asia/Pacific analyst summit, PwC's agent OS was spotlighted as the foundation for its agentic AI strategy. PwC's agent OS positions itself as an orchestration layer that enables enterprises to build, deploy, and govern AI agents across multiple functions and workflows. The system is designed to integrate seamlessly with Microsoft's cloud and AI platforms — leveraging Azure, Copilot, and the wider Microsoft ecosystem — while extending support to other environments, such as Amazon Web Services (AWS), Google Cloud, and Oracle, and leading enterprise applications, including SAP and Salesforce. This dual positioning underscores PwC's intent to anchor its AI services in the Microsoft alliance while retaining multicloud and multivendor flexibility, addressing client demand for both ecosystem depth and interoperability."

He adds, "PwC's agent OS reflects a shift in enterprise AI adoption toward orchestrated, production-scale deployment that embeds governance, security, and life-cycle management into the platform. In so doing, PwC reduces the operational and compliance risks of deploying autonomous agents while accelerating its time to value. For enterprises, this means that AI adoption is no longer only about model selection, data curation, or technology integration but about redesigning workflows to accommodate human-agent collaboration at scale. IDC's *2025 CEO Sentiment Survey* shows that 66% of APJ CEOs want to use AI for business model reinvention to achieve sustained competitive advantages. However, only 4% of APJ organizations are using AI to redesign their operating model for agentic processes. PwC's agent OS positions PwC to compete on operating model transformation services, helping clients achieve sustained advantages by aligning agent orchestration with workforce change management, cross-platform integration, and responsible AI practices."

Beyond Traditional Security Advisory

Sakshi Grover, senior research manager on cybersecurity services, IDC Asia/Pacific, says "What stood out most was PwC's ability to go beyond traditional advisory, positioning itself as a true co-innovation partner for clients. The firm highlighted how it is leveraging its global network of acceleration centers and regional hubs across Asia/Pacific to work hand-in-hand with enterprises, combining Microsoft's technology stack with PwC's industry expertise to help organizations modernize their infrastructure, embrace AI, and reimagine business outcomes. Client examples demonstrated this collaborative model in action, including large-scale transformation programs across the banking, financial services, and insurance (BFSI), energy, and infrastructure sectors."

Grover adds, "A notable case was from one of India's largest diversified corporations with operations spanning datacenters, energy, airports, and infrastructure, which transitioned from a legacy SIEM environment to a cloud-native, AI-driven security

architecture. This included scalable log ingestion of over 6TB daily, behavior-based threat hunting, advanced threat feed integration, OT asset discovery, secure remote access, and monitoring of OT vulnerabilities through a unified cyber SOC."

She adds, "PwC's platinum partnership with Microsoft and expertise in building data lake architectures for complete north-south traffic visibility make it well positioned to enable next-generation cyber SOC capabilities in multitenant environments.

According to IDC's *2025 Asia/Pacific Security Survey*, 31% of enterprises cited managed security services/managed detection and response (MSS/MDR), which covers MDR, SOC as a service, managed SIEM/EDR, and firewall/network/email protection, as a top 3 area of cybersecurity spending. Integrating OT security into enterprisewide resilience strategies, including identity and SIEM coverage, also emerged as a top priority for securing critical infrastructure, reinforcing the timeliness of PwC's investments and approach in this space."

She adds, "For large enterprises, the message is clear. PwC is rightly placed to manage risk assurance in the age of AI, when security has become paramount to sustaining trust and enabling innovation at scale."

Leveraging GenAI to Transform Workflows

Nishant Bansal, associate research director on worldwide services research, IDC India, says "PwC showcased how its GenAI factory and cloud-native platforms are transforming enterprise workflows across consumer markets and global reporting. In one client case, PwC highlighted the development of a next-generation global reporting platform built on Azure for more than 10,000 users. By centralizing data and leveraging Power BI dashboards connected to Azure Synapse Analytics, PwC enabled self-service analytics to help the team make faster and smarter decisions in choosing procurement items, vendors, quotes, and cities, and reduced ERP transformation complexity."

He adds, "PwC is also positioning itself at the forefront of agentic AI by integrating multiagent systems capable of orchestrating workflows, self-learning, and adapting to dynamic enterprise needs. This signals a clear pivot from experimentation to outcome-driven AI adoption, where efficiency gains and audit readiness are delivered as tangible business value."

LEARN MORE

- *Regulatory Turning Point: How Data Privacy, Cybersecurity, and AI Laws Are Reshaping Enterprise Strategy in Asia/Pacific* (IDC #AP52287825, June 2025)
- *Securing the Cloud: Key Priorities Driving Security Investments in Asia/Pacific* (IDC #AP52287725, June 2025)
- *Exploring the Role of External IT Services Providers in the Enterprise Agentic AI Journey in Asia/Pacific* (IDC #AP52292825, June 2025)

- *Cyber-Resilience — Turning Every Crisis into an Opportunity to Emerge Stronger* (IDC #US52280524, April 2025)

Synopsis

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