



Everest Group PEAK Matrix® for Amazon Web Services (AWS) System Integrator 2022

Focus on TCS
August 2022



Background of the research

The growth of enterprise adoption of public cloud is accelerating. The public cloud market is seeing a proliferation in services offered by the hyperscalers and a corresponding increase in the investments made by SIs in their hyperscaler-specific cloud services and solution portfolio. AWS continues to dominate the overall public cloud market and is focusing on innovation across different portfolio segments covering infrastructure, platform, data, and next-generation services.

With more enterprises embarking on their public cloud migration journey, integrated delivery, and effective management of integrated capabilities across the core infrastructure, cloud application, and data on cloud has become crucial. Enterprises are looking for strong system integration capabilities across the entire life cycle of the cloud journey covering consulting, infrastructure design/build, cloud modernization, and cloud operate services for individual hyperscaler portfolio segments.

SIs are investing in a joint go-to-market approach, AWS-specific organization structure, talent development roadmap, AWS-specific solutions and IPs, and co-innovation activities to cater to enterprise demands. There has been an uptick in both organic and inorganic investments by SIs to attain AWS accreditations and competencies.

In this research, we present the assessment and detailed profiles of 29 SIs featured on the [System Integration \(SI\) Capabilities on Amazon Web Services \(AWS\) PEAK Matrix® Assessment 2022](#). The assessment is based on Everest Group’s annual RFI process for calendar year 2022, interactions with leading SIs, client reference checks, and an ongoing analysis of the AWS services market.

The full report includes the profiles of the following 29 leading AWS SIs featured on the AWS PEAK Matrix:

- **Leaders:** Accenture, Capgemini, HCL Technologies, Infosys, TCS, and Wipro
- **Major Contenders:** IBM, Brillio, Cognizant, Deloitte, DXC Technology, EPAM, GFT, LTI, Microland, Mphasis, NTT DATA, Orange Business Services, Persistent Systems, Rackspace Technology, Sopra Steria, Tech Mahindra, TO THE NEW, UST, and Virtusa
- **Aspirants:** Aspire Systems, Jade Global, Tavant, and Xebia

Scope of this report



Geography
Global



Providers
29 leading AWS SIs



Services
AWS cloud services

System Integration (SI) capabilities on AWS PEAK Matrix® characteristics

Leaders:

Accenture, Capgemini, HCL Technologies, Infosys, TCS, and Wipro

- Leaders continue to make strategic investments in AWS partnership through AWS accreditations, partner launch programs, and competencies for various industries, use cases, and workloads, along with joint go-to-market initiatives and solution co-creation with AWS
- These players have a credible industry-specific cloud offerings portfolio, AWS-specific assets and IPs, next-generation offerings, strong complex workload transformation capabilities, and a platform-centric solutioning approach
- Leaders have demonstrated capabilities of successful integrated cloud transformations across core AWS infrastructure, application, and data on cloud layers
- These players have demonstrated strong market impact and extensive capabilities in delivering value on cloud by being strategic partners in the customer's transformational journey

Major Contenders:

IBM, Brillio, Cognizant, Deloitte, DXC Technology, EPAM, GFT, LTI, Microland, Mphasis, NTT DATA, Orange Business Services, Persistent Systems, Rackspace Technology, Sopra Steria, Tech Mahindra, TO THE NEW, UST, and Virtusa

- While these players are increasingly investing in building AWS competencies across various workloads and use cases, their capabilities in offering verticalized cloud solutions built on AWS and AWS-specific cross-industry assets lag Leaders
- These players have demonstrated high market impact in terms of YoY growth and value delivered to clients, while providing system integration capabilities on AWS
- They are making targeted investments in AWS-specific talent development, delivery capabilities, and partnership ecosystem

Aspirants:

Aspire Systems, Jade Global, Tavant, and Xebia

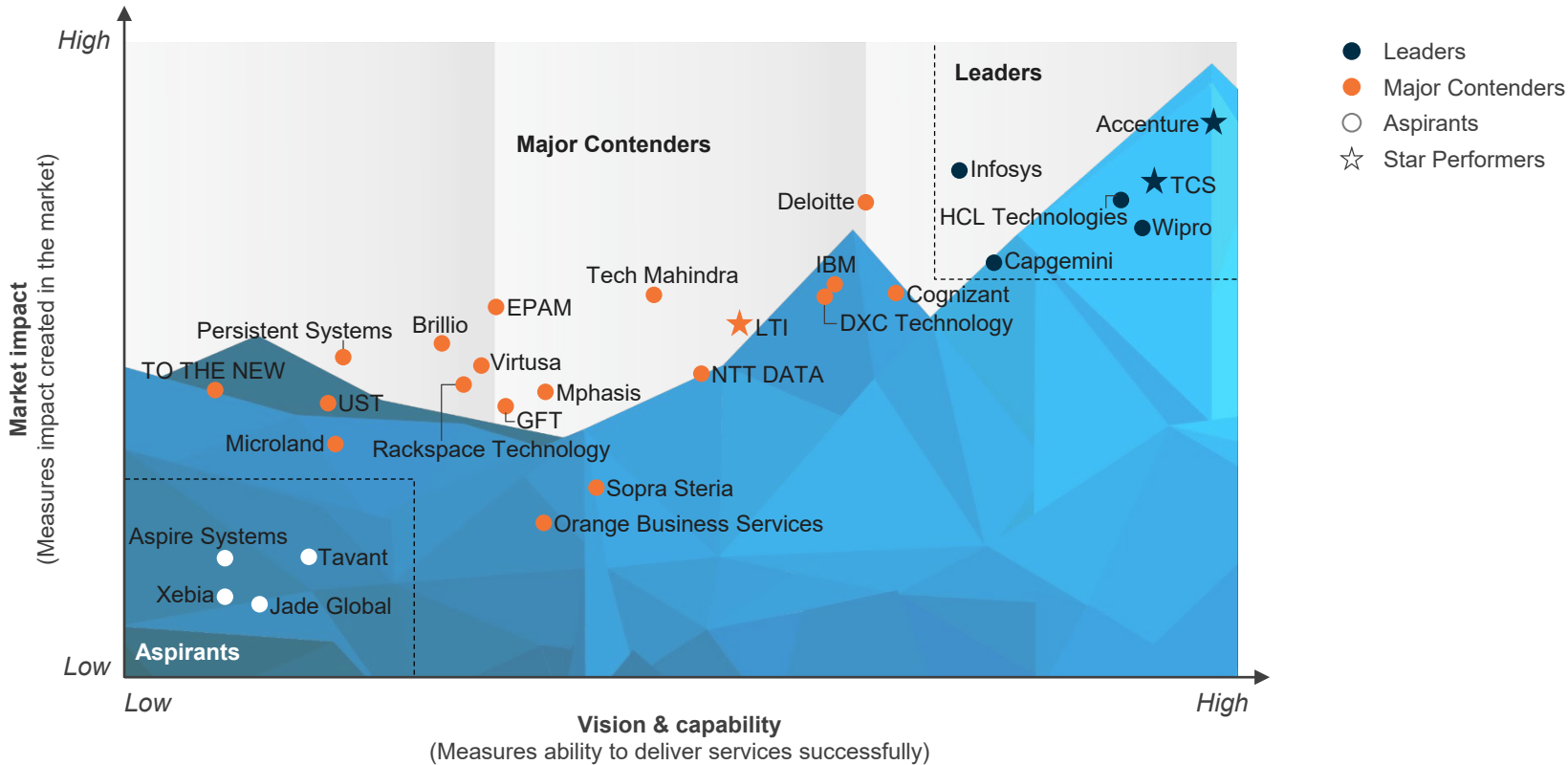
- AWS system integration capabilities of Aspirants are in the initial stages of the partnership level in terms of accreditations, qualifications, and competencies
- These players prefer relying majorly on AWS' portfolio of industry-specific and cross-vertical solutions instead of investing in natively developed asset and IP portfolio, in order to deliver differentiated services to clients

Everest Group PEAK Matrix®

System Integration (SI) Capabilities on Amazon Web Services (AWS) PEAK Matrix® Assessment 2022 | TCS positioned as Leader and Star Performer



Everest Group System Integration (SI) Capabilities on Amazon Web Services (AWS) PEAK Matrix® Assessment 2022¹












¹ Assessment for Capgemini and Deloitte excludes system integrator inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these system integrators, system integrator public disclosures, and Everest Group's interaction with buyers
Source: Everest Group (2022)

TCS | system integration capabilities on AWS (page 1 of 6)

Everest Group assessment – Leader and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
								

Strengths

- TCS has a comprehensive industry cloud with a strong focus on the retail, travel, transport, hospitality, life sciences, and BFSI industries, which makes it suitable for enterprises looking for a SI with verticalized solutions on AWS
- Enterprises will benefit from TCS’ comprehensive solution portfolio of integrated offerings on AWS, which is further enhanced by its continued investments in IPs and strong partnership with AWS
- Enterprises will find TCS suitable for complex engagements on AWS due to its credible talent pool with a considerable portion of the AWS-dedicated talent being AWS-certified
- TCS has a suite of sustainability in cloud solutions on AWS such as TCS Clever Energy and TCS ESG Integration solution, which makes it suitable for enterprises with sustainability-focused demands
- Some clients have highlighted domain expertise, commercial flexibility, and technical expertise as key strengths for TCS

Limitations

- Enterprises looking for extensive nearshore and onshore delivery footprint need to assess TCS’ capabilities carefully due to its offshore-heavy delivery model
- Enterprises looking for capabilities in up-and-coming technologies might not find TCS as a best-fit as it continues to be a laggard when it comes to augmenting its AWS-specific IP portfolio through inorganic growth means
- TCS lacks a data sovereignty-focused cloud portfolio, which makes it unsuitable for enterprises placing emphasis on data sovereignty requirements
- Some clients believe that TCS needs to enhance its project management and talent management capabilities to ensure timely completion of the engagements
- Some clients have highlighted the lack of a strategic partnership and innovative mindset as key challenges for TCS

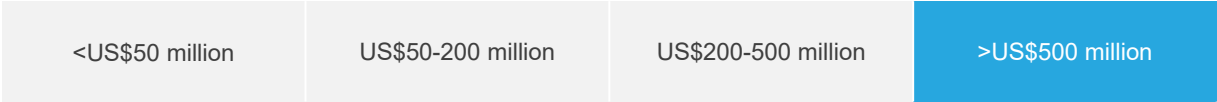
TCS | system integration capabilities on AWS (page 2 of 6)

Overview

AWS partnership overview

TCS is an AWS Premier Consulting Partner, certified managed services partner, and reseller partner in the US and Europe. TCS has a dedicated AWS business unit and supports customers on AWS as a full stack business transformation partner supporting complex operations on the cloud. TCS has over 10,000 AWS-certified professionals and nine AWS competencies. TCS has a joint GTM with AWS field teams and a dedicated focus on growing verticals such as BFSI, life sciences, healthcare, travel, transport, and hospitality, manufacturing, and automotive. The specialized teams within the AWS business unit help customers accelerate and automate the different stages of their cloud journey using TCS' library of frameworks, accelerators, and toolsets such as TCS Cloudonomy™, TCS' DATOM, and Cloud Counsel™.

Revenue from AWS-related services (2021)

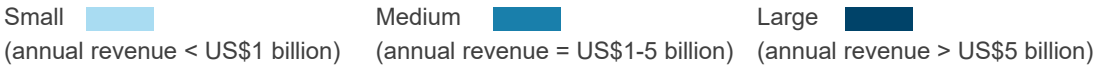


AWS portfolio – key highlights (representative list)

- AWS competencies achieved: DevOps, SAP Consulting, Migration Consulting, Financial Services, Security Consulting, Industrial Software, Travel & Hospitality, Storage and Mainframe Migration, and AWS Security
- Partner awards: AWS Rising Star Partner of the year – US 2021, Application Transformation year – ANZ 2021, and GSI Partner of the year – ANZ 2022
- TCS partner programs with AWS: Premium Tier Services, MSP, AWS Public Sector Partner, AWS China Partner, AWS Solution Provider Program, AWS Public Sector Solution Provider, Well-Architected, and APN Immersion Days
- TCS AWS service validations: Amazon Connect, Amazon EC2 Systems Manager Delivery, Amazon EMR, Amazon API Gateway, AWS Lambda Delivery, Amazon RDS Delivery, DB Migration Service, Redshift Delivery, and IoT core Service Delivery
- TCS launch partner: AWS ECS Anywhere, AWS Transfer family, AWS Wavelength, AWS Co-Pilot, AWS Out Post, AWS Time Stream, AWS Security, and AWS location Services

Low (<10%) Medium (10-20%) High (>20%)

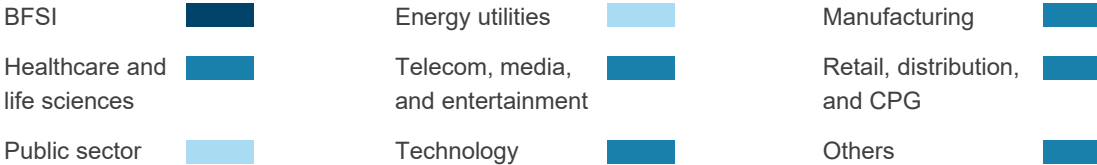
Adoption by buyer group



Adoption by geography



Adoption by industry



Adoption by service segments



TCS | system integration capabilities on AWS (page 3 of 6)

Case studies

Case study 1

Cloud-based smart mobility system powered by TCS' DigiGOV™ Framework

Client: Transport for London (TFL)

Business challenge

The client was facing challenges with its outdated taxi and private hire digital platform. It was facing high operational costs as well as the lack of a central repository of data and data availability for self-consumption as well as use by other suppliers.

Solution

- Refreshed a 15-year-old outdated taxi and private hire digital platform, with a superior new platform that provides new digital channels and improved user experience
- Designed a single platform using TCS' own DigiGOV™ enterprise framework, which takes in a self-service portal, workflow and case management functions, analytics and dashboards, a security framework, authentication, and a search engine

Impact

- Improved customer experience
- Reduced operational costs with a new cloud-based technology and solution and increased automation
- Faster, more integrated, and agile smart mobility solution for UK's critical national infrastructure
- Increased speed, scalability, and agility

Case study 2

Global operations transformation powered by TCS Aviana™ on AWS

Client: United Airlines

Business challenge

The client wanted to improve and empower its frontline staff with real-time information on all airline operations. It needed a digital tool for up-to-the-minute data to inform better decision-making and improve collaboration and interoperability among its business units and ecosystem partners.

Solution

- The client connected its siloed systems using TCS Aviana™, a suite of intelligent airline operations solutions on AWS
- Configured over 500 operations anomalies; flags nearly 400 business events per second for immediate remediation
- TCS' cloud-based Aviana™ solution provided a ready platform for future enhancements and initiatives as part of United's global operations transformation
- Monitored, measured, and unified the performance of United Airlines and its subsidiaries for real-time travel intelligence across stakeholders

Impact

- Enabled early visibility into United Airlines' critical operational deviations
- Expedited operational issue mitigation and enabled proactive action

TCS | system integration capabilities on AWS (page 4 of 6)

Solutions/IPs/products

Proprietary solutions/IPs/products (representative list)	
Event name	Details
TCS Aviana™ on AWS	An AI/ML-based aviation solution suite that enables connected insights and intelligence for comprehensive operations visibility, digital collaboration, and augmented decisions for airline ecosystem
TCS Crystallus™ on AWS	A set of pre-configured industry solutions that accelerate SAP S/4HANA-enabled digital transformations on AWS, giving enterprise customers a competitive edge
TCS ADD™ Safety	An AI-driven platform that integrates data from different sources and enables automated intake, analysis, and reporting of high safety cases volume with quality and consistency
TCS OmniStore™	A unified composable commerce platform built on MACH principles, which changes the way customers shop
TCS Intelligent Inspection System	A solution that enables insurers and service providers to perform remote inspections in a quick and cost-effective way
Cloud Value Measurement Model (CVMM)	A KPI/metrics-driven cloud-agnostic framework developed to measure the customer's cloud value attained progressively during different stages of cloud adoption. Its prime focus is on cost savings, operational excellence, growth and transformation, and business agility
Cloud Exponence	Offers a readymade solution for integration with AWS and other public and hybrid clouds
Digital Maturity Assessment (DMATE)	A digital maturity assessment and roadmap tool to track and manage enterprise-wide digital maturity from a consensus-based, objective viewpoint across customer, operations, workplace, strategy, and infrastructure dimensions
AWS Migration Assessment, Strategy & Decision Service - Cloud Counsel	An accelerated on-premise infrastructure discovery and migration roadmap to AWS. It enables migration assessment, infrastructure dependency discovery, guidance for move groups creation, and Rol and TCO projections
TCS ESG Integration Solution	Leverages the platform's cognitive AI/ML capabilities to enable Financial Institutions to source, process, integrate, and analyze ESG data from multiple sources. TCS ESG Integration solution helps financial institutions measure the impact of ESG factors in their investment analysis
TCS Cloudonomy™	A cloud-agnostic platform for the multi-cloud / hybrid cloud customers and an advanced unifying digital platform that provides a simulator-like experience in envisioning and executing cloud adoption

TCS | system integration capabilities on AWS (page 5 of 6)

Partnerships

Partnerships (representative list)	
Partner name	Details
MongoDB	Partnered with executive sponsorship from MongoDB CEO in which data estate and mainframe modernization are the primary focus areas
Databricks	Partnered for embracing strategic partnership across multiple client successes
Snowflake	Partnered with executive sponsorship to focus primarily on data platform modernization
Qlik	Partnered for data visualization and analytics solutions
VMware	Partnered for more than a decade to focus on VMC on AWS
RedHat	Partnered for co-development with Red Hat on TCS Migration tool's readiness on Red Hat OpenShift
Cloudera	Partnered to focus on delivering analytics and big data capabilities
Oracle	Partnered as a platinum partner and cloud elite partner
Nutanix	Partnered to focus on software-defined cloud capabilities
SAP	Partnered as a global strategic services partner
ServiceNow	Partnered for ITSM capabilities and foundation for Cloud Exponence platform
SnapLogic	Partnered for iPaaS platform capabilities
Intel	Global strategic alliance since 2017. Partnered across technology streams including Cloud, Edge, IOT, HPC, AI, and 5G
Cisco	Partnered to deploy Cisco's Application Centric Infrastructure (ACI) architecture in TCS' Enterprise Cloud Platform (ECP)
Cohesity	Partnered as a global system integrator for data protection solutions
Science Logic	Partnered to leverage Science Logic's solutions that spread across cloud and distributed architectures, contextualize data through relationship mapping, and act on this insight through integration and automation

TCS | system integration capabilities on AWS (page 6 of 6)

Investments and recent activities

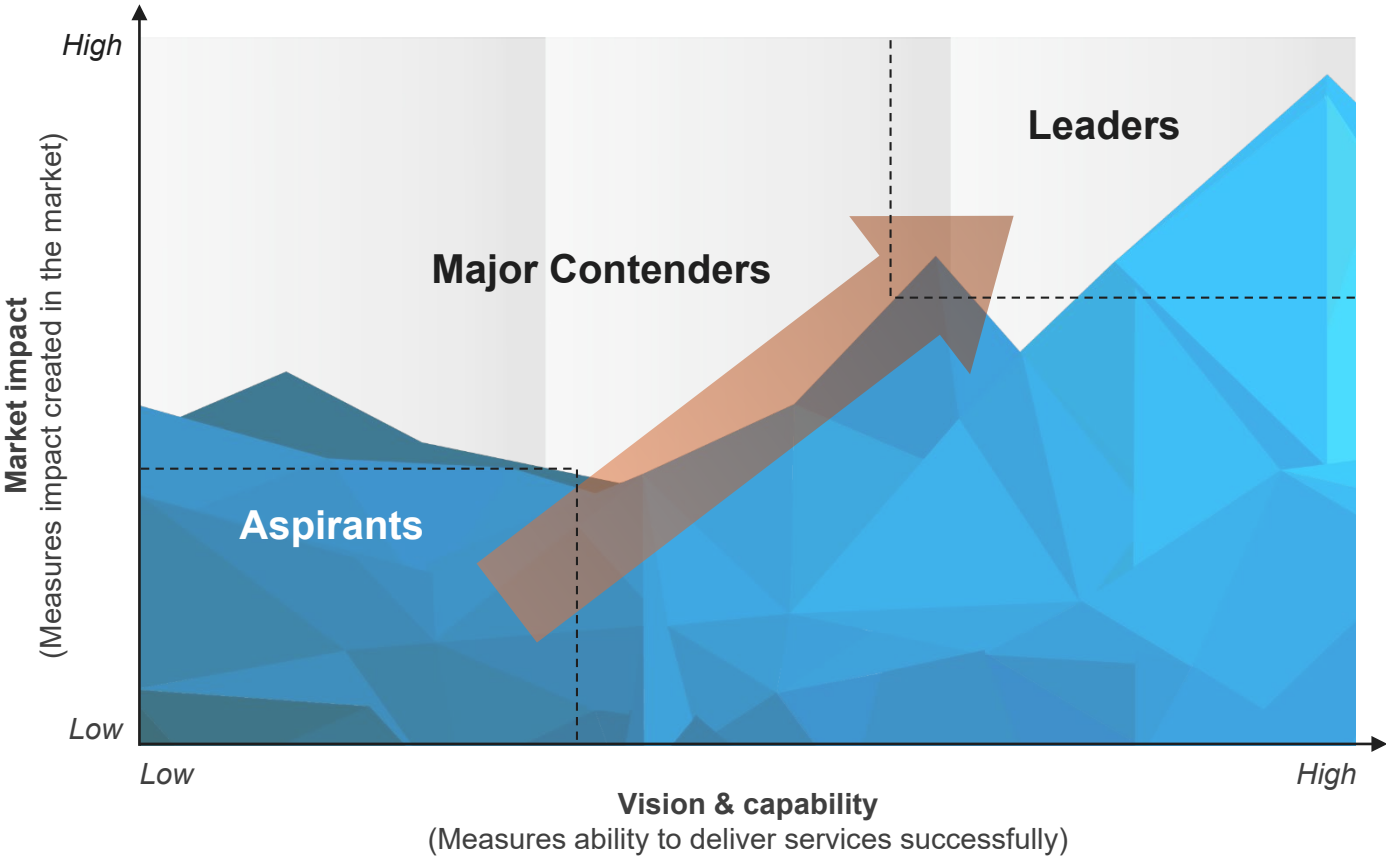
Investments (representative list)	
Investment name	Details
Sustainability and ESG	TCS collaborated with AWS to offer the TCS ESG Integration Solution on AWS, which includes a cloud-native ESG data ingestion platform and a custom ESG scoring model. The solution enables investment managers to procure ESG data from multiple sources, including ESG data providers on the AWS Data Exchange, and then integrate and standardize these datasets using AWS services, before automatically aligning the data to industry performance indicators using the TCS ESG Integration Solution
Co-Build with AWS	Launch partner for AWS': ECS Anywhere, Transfer Family, Wavelength, Co-Pilot, Out Post, and Time Stream
Business Solutions on AWS	Investments to help enterprises achieve more from the cloud with tailor-made industry-specific business solutions that are powered by the next-generation technologies such as AI/ML, IoT, and blockchain and helping industries across the globe including BFSI, HLS, travel transport and hospitality, manufacturing, retail and consumer services, communication and media, etc.
TCS PacePort™	Invested to build a global network of physical-digital innovation hubs that serve to accelerate digital transformation and develop creative solutions enabling an organization to focus on its business needs
Products portfolio	Invested in its products portfolio in areas of multi-cloud, AI/ML, IoT, edge, data and analytics, and data sovereignty
Talent	Invested in organic talent development, research and innovation, and creating intellectual property to boost its talent innovation credentials. TCS has adopted a 360-degree approach by continuously training and nurturing client-facing growth and transformation professionals across industries on AWS. Additionally, TCS has built a training program for clients, enabling knowledge management and transfer to customers

Appendix

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability



Everest Group PEAK Matrix





Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption

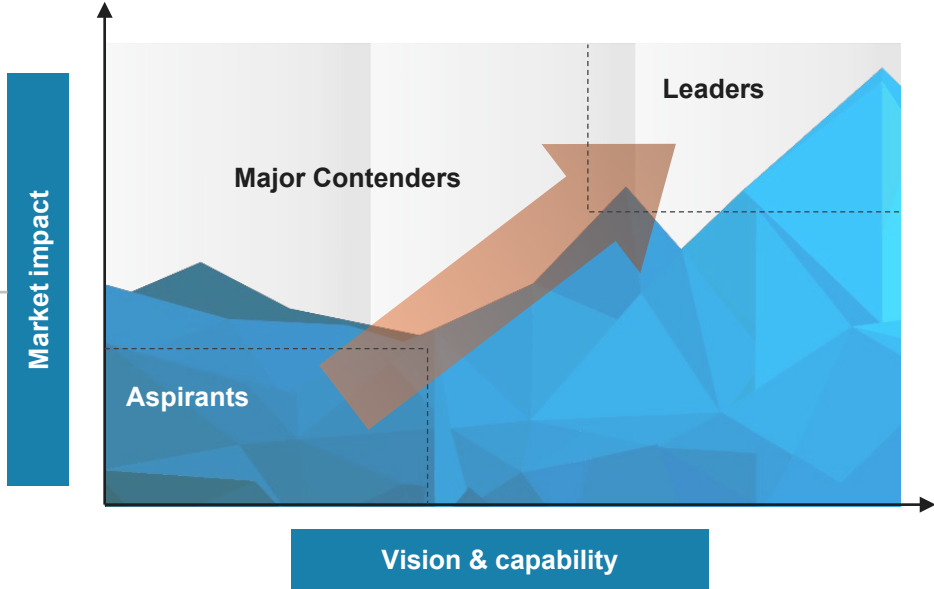
Number of clients, revenue base, YOY growth, and deal value/volume

Portfolio mix

Diversity of client/revenue base across geographies and type of engagements

Value delivered

Value delivered to the client based on customer feedback and transformational impact



Measures ability to deliver services successfully. This is captured through four subdimensions

Vision and strategy

Vision for the client and itself; future roadmap and strategy

Scope of services offered

Depth and breadth of services portfolio across service subsegments/processes

Innovation and investments

Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.

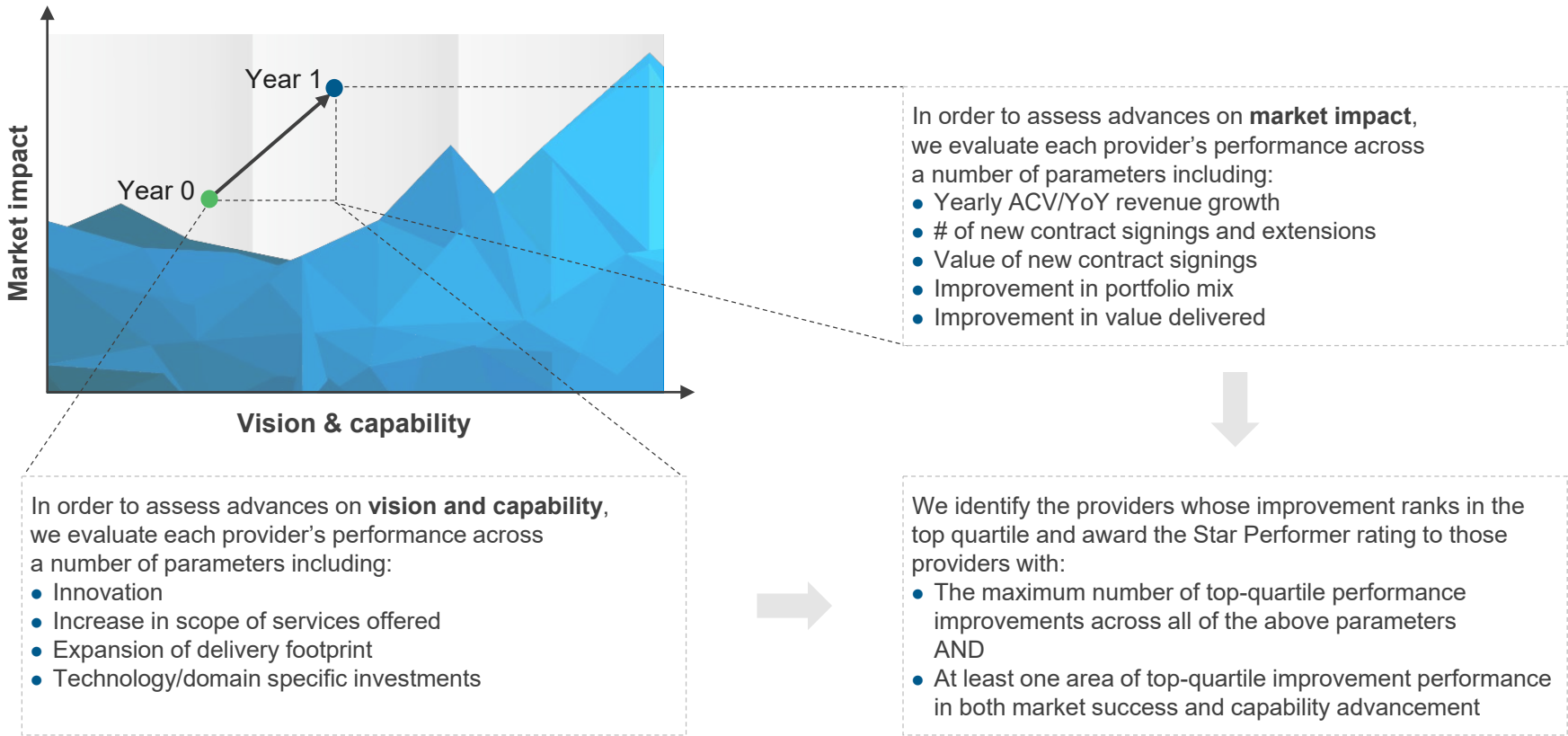
Delivery footprint

Delivery footprint and global sourcing mix

Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix



The Star Performers title relates to YoY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a “Major Contender” or “Aspirant” on the PEAK Matrix, an unfavorable outcome?

No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?

A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a “Leader”, “Major Contender,” or “Aspirant” title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles

What is the process for a provider / technology vendor to leverage their PEAK Matrix positioning and/or “Star Performer” status ?

- Providers/vendors can use their PEAK Matrix positioning or “Star Performer” rating in multiple ways including:
 - Issue a press release declaring their positioning. See [citation policies](#)
 - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises



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