

# Everest Group PEAK Matrix<sup>®</sup> for Google Cloud Platform (GCP) System Integrators 2021

Focus on TCS  
December 2020



## Introduction and scope

Everest Group recently released its report titled [System Integrator \(SI\) Capabilities on Google Cloud Platform \(GCP\) PEAK Matrix® Assessment 2021](#). This report analyzes the changing dynamics of the GCP public cloud landscape and assesses system integrators across several key dimensions.

As a part of this report, Everest Group updated its classification of 18 system integrators on the Everest Group PEAK Matrix® for SI capabilities on GCP Services into Leaders, Major Contenders, and Aspirants. The PEAK Matrix® is a framework that provides an objective, data-driven, and comparative assessment of GCP system integrators based on their absolute market success and delivery capability.

Based on the analysis, **TCS emerged as a Leader**. This document focuses on **TCS'** SI capabilities on GCP and includes:

- TCS' position on the SI capabilities on GCP Services PEAK Matrix®
- Detailed GCP services profile of TCS

Buyers can use the PEAK Matrix® to identify and evaluate different system integrators. It helps them understand the system integrators' relative strengths and gaps. However, it is also important to note that while the PEAK Matrix® is a useful starting point, the results from the assessment may not be directly prescriptive for each buyer. Buyers will have to consider their unique situation and requirements and match them against system integrator capability for an ideal fit.

## Background of the research

- Enterprise consumption of cloud has experienced a dramatic shift, from a skeptical outlook to going all in on public cloud, in the last few years. More than 90 percent of enterprises already leverage one or more public clouds in their enterprise environment
- COVID-19 has further accelerated enterprise migration to public cloud as most enterprises saw clear business continuity benefits during the pandemic. Contrary to an expected slowdown due to COVID-19, most enterprises have accelerated their digital transformation efforts, with migration to public cloud being a key transformation lever
- Despite being a late entrant when compared to AWS and Azure, GCP has registered good growth and captured a meaningful share in the hyperscaler market. GCP's innovation-driven culture and offerings across infrastructure, platforms, data, and next-generation segments have helped it create a niche amongst the hyperscalers. With the recent restructuring of sales team and renewed go-to-market strategy, GCP has seen a spike in demand for its offerings. Rapid adoption, coupled with management complexities and talent crunch, is pushing enterprises to seek third-party support. System integrators help enterprises in navigating the GCP landscape across infrastructure, platform, data, and next-generation technology segments
- In this research, we present an assessment of 18 GCP cloud system integrators featured on the SI capabilities on GCP PEAK Matrix®

The assessment is based on Everest Group's annual RFI process conducted over 2020, interactions with GCP system integrators, client reference checks, and an ongoing analysis of the cloud services market.

### This report assessed the following 18 system integrators on the GCP PEAK Matrix® Assessment 2021:

- **Leaders:** Accenture, Atos, HCL Technologies, Infosys, TCS, and Wipro
- **Major Contenders:** Capgemini, Cloudreach, Cognizant, DXC Technology, GFT, Mphasis, NTT DATA, Sopra Steria, and Virtusa
- **Aspirants:** Aspire Systems, Coforge, and UST Global

#### Scope of this report:



**Geography**  
Global



**System integrators**  
18 leading cloud system integrators



**Services**  
Cloud services

# System Integrator (SI) Capabilities on Google Cloud Platform (GCP) PEAK Matrix® Services characteristics

## Leaders:

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

- Leaders have established successful businesses in GCP services, driven by capability building and experience across the infrastructure, platform, data, and next-generation capabilities
- These players continue to proactively drive investments in next-generation technology themes such as data & analytics and AI/ML and build strategic roadmaps for GCP services (internal IP/tools, partnerships, co-innovation labs, and CoEs)
- Leaders have a strong focus in driving alignment between the business and IT teams of enterprises to drive higher value through contextual solutions tailored to specific enterprise requirements
- All Leaders have a strong focus on driving large-scale/complex cloud transformation, specifically for the large enterprise segment (with annual revenue greater than US\$5 billion)

## Major Contenders:

Capgemini, Cloudreach, Cognizant, DXC Technology, GFT, Mphasis, NTT DATA, Sopra Steria, and Virtusa

- Major Contenders in the GCP services space include born in the cloud as well as established system integrators
- While global players strongly leverage/include their assets and data center footprint along with their GCP services offerings, “asset-light” providers leverage their partner technology ecosystem to provide these services
- These companies continue to invest aggressively in building their IP, partnership ecosystem, and delivery capabilities across the GCP services spectrum, as well as in increasing their global coverage

## Aspirants:

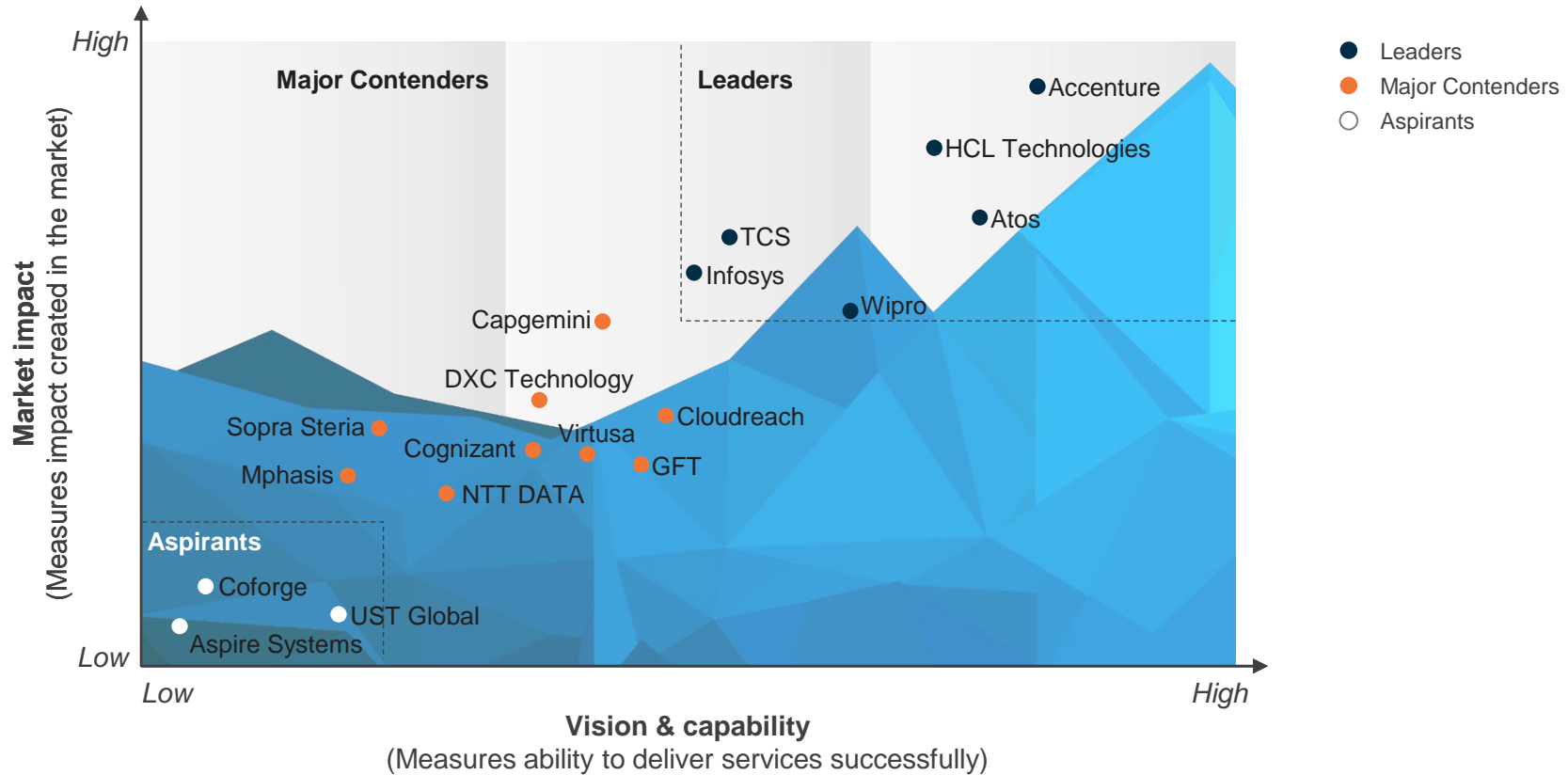
Aspire Systems, Coforge, and UST Global

- The GCP services business of Aspirants is in the initial stages of asset and capability maturity
- While these system integrators are making investments to build delivery capabilities and IP/tools, they will also need to develop and strengthen advisory and design services capabilities on GCP to build market awareness and credibility as strategic transformation partners for enterprises

# Everest Group PEAK Matrix®

## System Integrator (SI) Capabilities on Google Cloud Platform (GCP) Services PEAK Matrix® Assessment 2021 | TCS positioned as Leader

Everest Group System Integrator (SI) Capabilities on Google Cloud Platform (GCP) Services PEAK Matrix® Assessment 2021



Note: Assessment for Atos is based on Everest Group's proprietary Transaction Intelligence (TI) database, system integrator's public disclosures, and Everest Group's interactions with enterprises that have adopted GCP  
Source: Everest Group (2020)

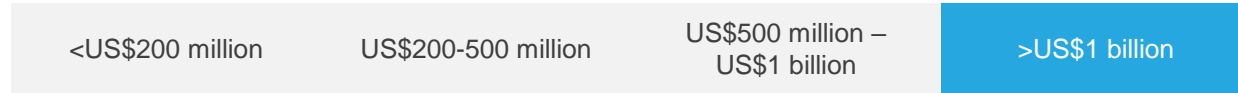
# TCS | system integrator capabilities on GCP (page 1 of 5)

## Overall cloud services overview

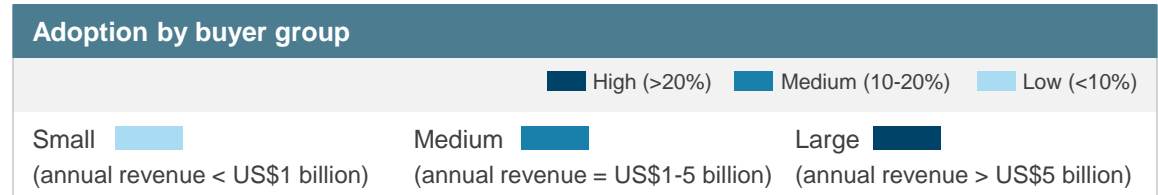
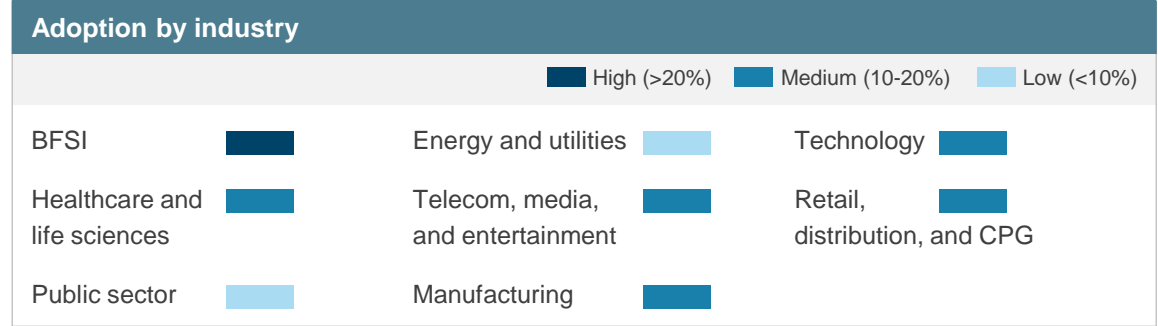
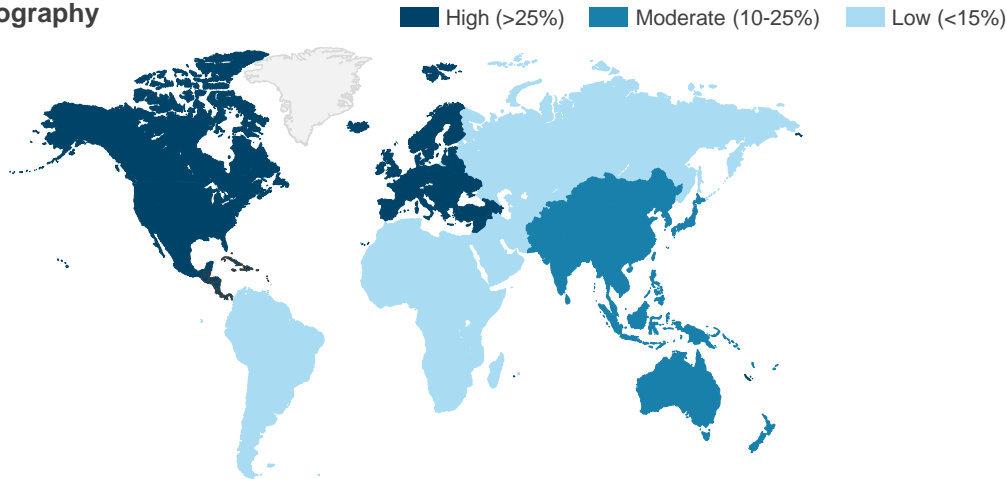
### Cloud services vision:

TCS's cloud services' vision is to become a trusted cloud services partner for its clients and amplify sustainable value to the business throughout the life cycle stages of digitalization, driven by a cloud adoption strategy. Firm's cloud services strategy aims to enable smart orchestration of application, technology platform, and data, creating modern business 4.0 enterprises that are intelligent, agile, automated, and on the cloud. TCS aims to help global enterprises craft a resilient, adaptable, and purpose-driven cloud paradigm for enterprise growth and transformation.

### Overall cloud services revenue (2019)



### Adoption by geography



Source: Everest Group (2020)

# TCS | system integrator capabilities on GCP (page 2 of 5)

## Capabilities on GCP overview

### GCP partnership overview:

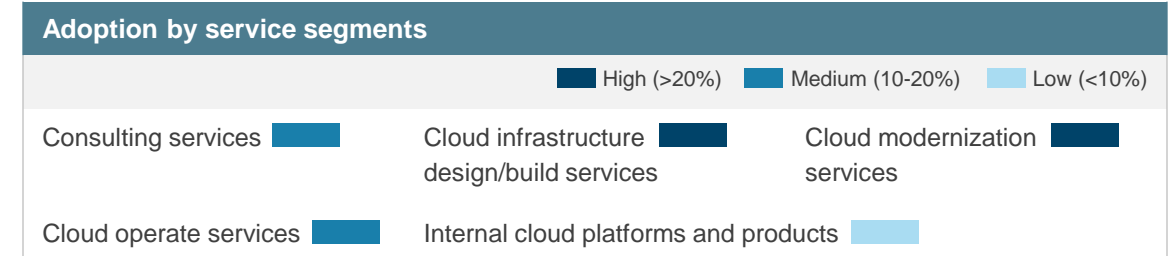
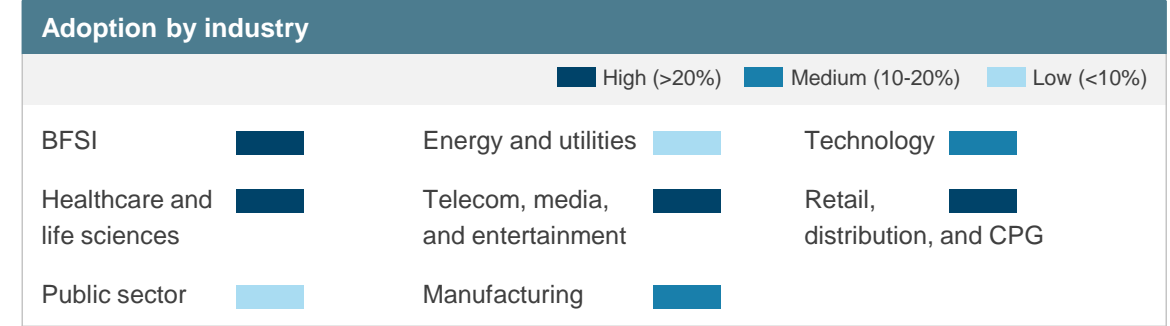
TCS leverages Google Cloud's partner team support to access partner acceleration programs, Google solution architects for architecture validation, and adoption of Google best practices. TCS is a GCP premier partner and a strategic cloud partner. The partnership includes a joint go-to-market initiative on cloud migration, modernization, API creation, a dedicated Google partner manager & cloud solution architect, and a Google CoE.

### Revenue from GCP-related services (2019)



### GCP portfolio – key highlights (representative list)

- TCS is developing industry-specific solutions on GCP including TCS Optumera™ and retail analytics on SAP HANA, integrated with BigQuery
- TCS has invested extensively in development of GCP cloud-ready professionals. TCS has 750+ GCP certified associates
- Key use cases delivered on GCP include:
  - Infrastructure modernization - Containerization and hybrid cloud using Google compute engine and GKE and diversification to DB platforms
  - Applications modernization - Google Anthos-based hybrid cloud solutions deploying microservices architecture
  - Data modernization - Analytics estate modernization and deploying data lake solutions
  - Native app development and APIfication – Apigee-based solution for cloud-native apps integrations
  - AI and ML Solutions - AI and ML solution in contact center, cross-industry solutions for intelligent supply chain management using AI/ML



# TCS | system integrator capabilities on GCP (page 3 of 5)

## Key solutions

### Proprietary solutions (representative list)

Solution name	Details
AI workbench	For enterprises looking for Digital GCP cloud transformation journey. AI workbench helps clients across industry verticals to address scale, speed, and effective management of AI/ML models with contextual knowledge. It leverages industry leading in-build AI/ML capabilities and has focus on accelerated time to market and exponential business value
Cognitive computing suite	State-of-the-art AI platform developed to perform intelligent automation employing several algorithms on deep learning, machine learning, image processing, language processing, etc. This can be deployed on premise or delivered as a GCP Cloud solution
TCS Cloud Exponence	A centralized delivery platform for public and hybrid cloud environments. It helps enterprise customers to on-board services enabled by TCS MFDM™, while reducing transition time and creating a standardized delivery experience, integrated to deliver operations with GCP solutions
Cloud counsel	A discovery, cloud assessment, and cloud recommendation offering that uses a three-pronged approach – application, infrastructure, and business considerations to get a 360° view and helps customers select the right cloud model and cloud provider, and determine cloud migration roadmap
TCS Intelligent Cloud Migration Continuum (iCMC)	A diagnostic solution that embodies TCS' Machine First™ approach to enhance speed-to-market and delivery certainty in cloud migration and core transformation engagements with customers. iCMC migration services automate industrialized cloud migration using TCS Cloud Migration Factory
Modernization propeller	A one-stop shop to address a host of challenges faced in adoption of microservices. Assessment of enterprise maturity for modernization, application assessment for microservices fitment, expedite domain-driven decomposition leveraging contextual knowledge repository, and reference architecture formulation, build, and cost determination
Business Ecosystem Integration Services (BEIS)	Enables access to the current integration and APIfication state of an organization, gauge its maturity level with respect to adoption of the next-generation products considering the applications dependencies, and complexities on an on-premise or hybrid architecture
Enterprise cloud migration services	Enables execution speed & certainty to the applications that are candidates for migration. Both low-touch (lift & shift) and high-touch (refactor/replatform using cloud-native PaaS services) applications maps to the factory assembly lines
TCS MasterCraft DevPlus	A scalable, agile, and DevOps product that helps application development teams tailor their workflow to track and manage scrum, Kanban or any other agile framework, perform continuous testing, and automate release management
TCS MasterCraft TransformPlus - Application Cloud Migration Edition	An intelligent automation platform that offers an impact analysis engine to drive migration decisions and an automated remediation platform that leverages the experience of TCS
Cloud Mason	To define, design, and deploy an enterprise-scale cloud foundation for deploying modern digital applications using IaaS, containers, PaaS, and serverless architecture on AWS, Azure, and GCP which are integrated with customer private cloud or on-premise data centers
Cloud Pinnacle	Set of niche PaaS platforms and related services with pre-built integration APIs for public cloud platforms such as AWS and Azure. Platforms include blockchain composite offering to provision hyperledger fabric into public cloud infrastructure and digital interactive offering for creating full-stack cloud solutions powered by PaaS services
Jile™	It is a cloud-based enterprise agile DevOps platform with inbuilt DevOps tools that provides visibility in the software delivery pipeline and helps them adopt and accelerate Agile development in a single platform



# TCS | system integrator capabilities on GCP (page 4 of 5)

## Case study, investments, and recent activities

Case study	
Business capability-driven modernization	
Client	World's leading kiwifruit exporter
Business challenge	Client had legacy systems with a technical debt posing hindrance to overall experience of suppliers of kiwifruit. Manual interventions and existing processes resulted in losing pace with global ambitions
Solution	TCS worked on IT & business function landscape analysis and assessment to strategize cloud adoption. Focus on modernizing the existing legacy mammoths for short-, mid- and long-term enterprise vision with domain-driven decomposition strategy. It built a new grower payment application and payment calculation engine with interfaces to upstream enterprise systems /logistics systems and downstream finance application
Impact	<ul style="list-style-type: none"> <li>• Cost reduction of ~ 60% with reduced CAPEX as well as OPEX is also optimized through usage of PaaS services</li> <li>• Enhanced grower experience of ~ 20 % through improved and accurate communications around price realization every month</li> <li>• Increased collaboration via faster onboarding of growers of ~ 20%</li> <li>• Improved accuracy of payment and forecasting mechanism</li> <li>• Ability to provide simulation for progress payments and scenario-based forecasting for better pricing realization</li> </ul>

Recent investments and activities (representative list)	
Development	Details
Partnerships	<ul style="list-style-type: none"> <li>• TCS has been selected as the strategic partner for cloud modernization on Google Anthos and TCS-Google Cloud/Apigee joint strategy on cloud transformation and modernization for clients globally</li> <li>• Partnered with Cisco to jointly offer a solution to help enterprises adopt smooth cloud transformation by leveraging Cisco's ACI capabilities and TCS's Enterprise Cloud Platform (ECP)</li> <li>• Partnered with EdCast to jointly offer and implement EdCast's knowledge cloud and learning experience solutions</li> </ul>
IPs	<ul style="list-style-type: none"> <li>• TCS Optumera™ is a retail optimization suite built on GCP cloud that addresses the emerging omnichannel needs of today's retailers. It harnesses the power of AI to enable retailers with high precision in decision-making. Optumera™ helps retailers identify demand signals and marketplace changes, thereby driving market competitiveness and customer delight.</li> <li>• Launched TCS WaferWise™, a cloud-based wafer anomaly detection solution that leverages TCS' knowledge of semiconductor industry to help chip makers digitally reimagine their product quality assurance process</li> </ul>
Other investments	<ul style="list-style-type: none"> <li>• Investments in TCS' Cloud Foundation Services on Anthos to help enterprises develop and manage hybrid applications across environments</li> <li>• TCS has invested in Machine-First™ Delivery Model (MFDM), SAP on cloud, and data insight services</li> <li>• TCS has data and analytics estate modernization solution that helps customers transform their existing data systems into future-ready platforms to gain differentiating business insights</li> </ul>

# TCS | system integrator capabilities on GCP (page 5 of 5)

## Everest Group assessment – Leader

Measure of capability: ● High ◐ Low

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 developed industry-specific solutions such as Optumera™ for retail, WaferWise™ for semiconductor industry, and retail analytics on SAP HANA by leveraging data analytics and AI on GCP
- With the help of its data estate modernization solutions, TCS modernizes client’s data platforms to provide relevant business insights and has seen significant market success for this solution on GCP
- Clients have appreciated TCS’ willingness to share risks in complex modernization initiatives in GCP, domain knowledge, and client management
- It has created a library of assets, blueprints, and accelerators to help automate different stages of the cloud journey on GCP and other public clouds. It has also developed toolkits to aid clients adopting AI/ML models on GCP
- TCS has recently announced internal reorganization of its cloud portfolio and has built a dedicated GCP unit

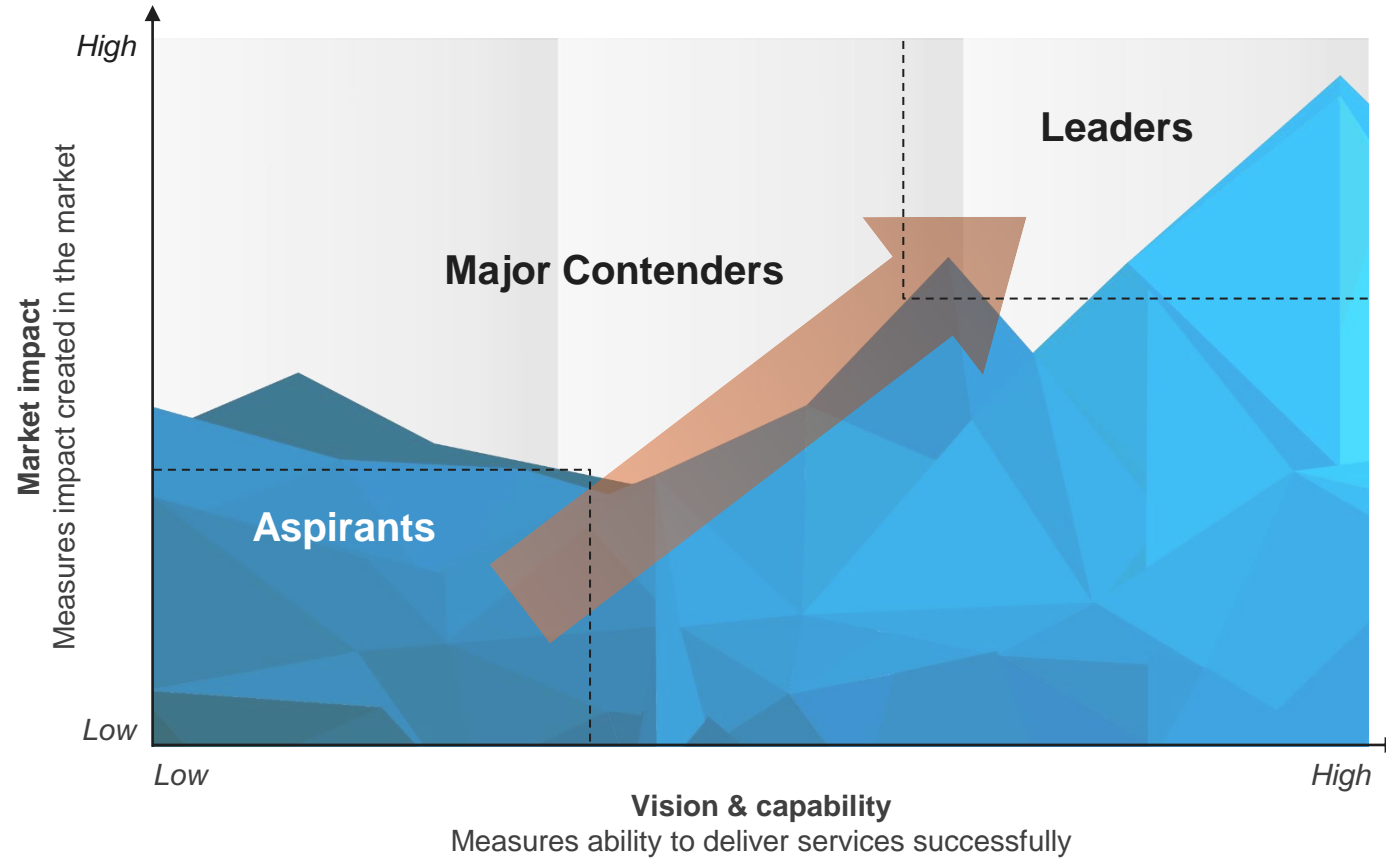
### Areas of improvement

- TCS needs to showcase more proof-points and customer success stories in the areas of SAP migration to GCP and in helping clients exit on-premise datacenters to migrate to GCP. Other leaders in this assessment have seen good market success in these areas
- Clients have expressed the need for TCS to incorporate talent management capabilities and proactiveness for cost-saving initiatives in their GCP services delivery
- To further augment capabilities, TCS needs to focus on acquiring “GCP Specializations” such as application development, infrastructure, data analytics, and machine learning
- Considering the growing enterprise adoption of GCP, TCS needs to revisit its organic growth strategy for acquiring new capabilities. It can leverage bolt on acquisitions to accelerate capability development on GCP

# Appendix

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

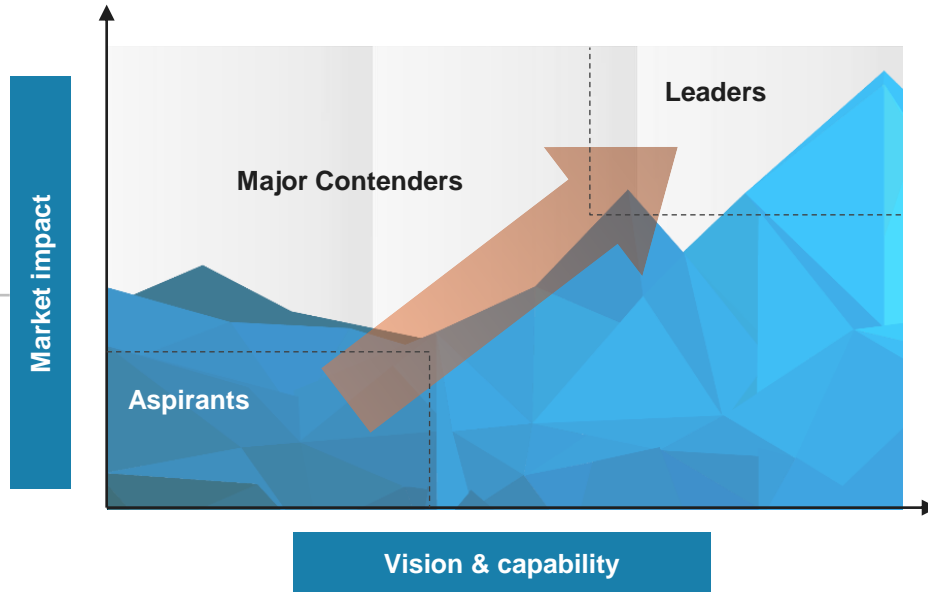
Everest Group PEAK Matrix



# 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

# FAQs

## **Does the PEAK Matrix® assessment incorporate any subjective criteria?**

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging service 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 service 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 service 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



Everest Group is a consulting and research firm focused on strategic IT, business services, engineering services, and sourcing. Our clients include leading global enterprises, service providers, and investors. Through our research-informed insights and deep experience, we guide clients in their journeys to achieve heightened operational and financial performance, accelerated value delivery, and high-impact business outcomes. Details and in-depth content are available at [everestgrp.com](https://www.everestgrp.com).

## Stay connected

### Website

[everestgrp.com](https://www.everestgrp.com)

### Social Media

-  @EverestGroup
-  @Everest Group
-  @Everest Group
-  @Everest Group

### Blog

[everestgrp.com/blog](https://www.everestgrp.com/blog)

### Podcast

DigitalReallTy



### Dallas (Headquarters)

[info@everestgrp.com](mailto:info@everestgrp.com)  
+1-214-451-3000

### Bangalore

[india@everestgrp.com](mailto:india@everestgrp.com)  
+91-80-61463500

### Delhi

[india@everestgrp.com](mailto:india@everestgrp.com)  
+91-124-496-1000

### London

[unitedkingdom@everestgrp.com](mailto:unitedkingdom@everestgrp.com)  
+44-207-129-1318

### New York

[info@everestgrp.com](mailto:info@everestgrp.com)  
+1-646-805-4000

### Toronto

[canada@everestgrp.com](mailto:canada@everestgrp.com)  
+1-416-388-6765

*This document is for informational purposes only, and it is being provided "as is" and "as available" without any warranty of any kind, including any warranties of completeness, adequacy, or fitness for a particular purpose. Everest Group is not a legal or investment adviser; the contents of this document should not be construed as legal, tax, or investment advice. This document should not be used as a substitute for consultation with professional advisors, and Everest Group disclaims liability for any actions or decisions not to act that are taken as a result of any material in this publication.*