

TCS AI Ecosystem

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From Infrastructure to Intelligence

Intelligence
in Action

Physical

TCS AMR, Quadruped
Robotics & Smart devices

Digital

Third party integration services
Conversational & Visual interfaces

Applications & Agents
(Vertical & Horizontal)

**TCS BaNCS™, TCS ADD™, TCS Optumera™,
TCS TwinX, purpose-built Agents etc..**
Smart applications & Autonomous agents

Frameworks & Tools

**Ignio™, CodePlus, CAP.AI, TCS AI
WisdomNext™**
AI platforms

Models
Data

Specialized

Claims, Fraud, Agriculture etc..
Domain-tuned models

Foundation

Third party integration services
Generative model (LLMs, SLMs)

Infrastructure
& Hardware

**TCS SovereignCloud™, TCS Cloud,
Semiconductor Solutions**
Chips, servers, devices & Platform

HyperVault
AI Data Centers

Gaining leadership in Full stack AI Services

Our aspiration is to be a strategic partner for our clients across the full AI tech stack. Towards this we will,

Build

Talent, Intellectual
Property & New Ventures

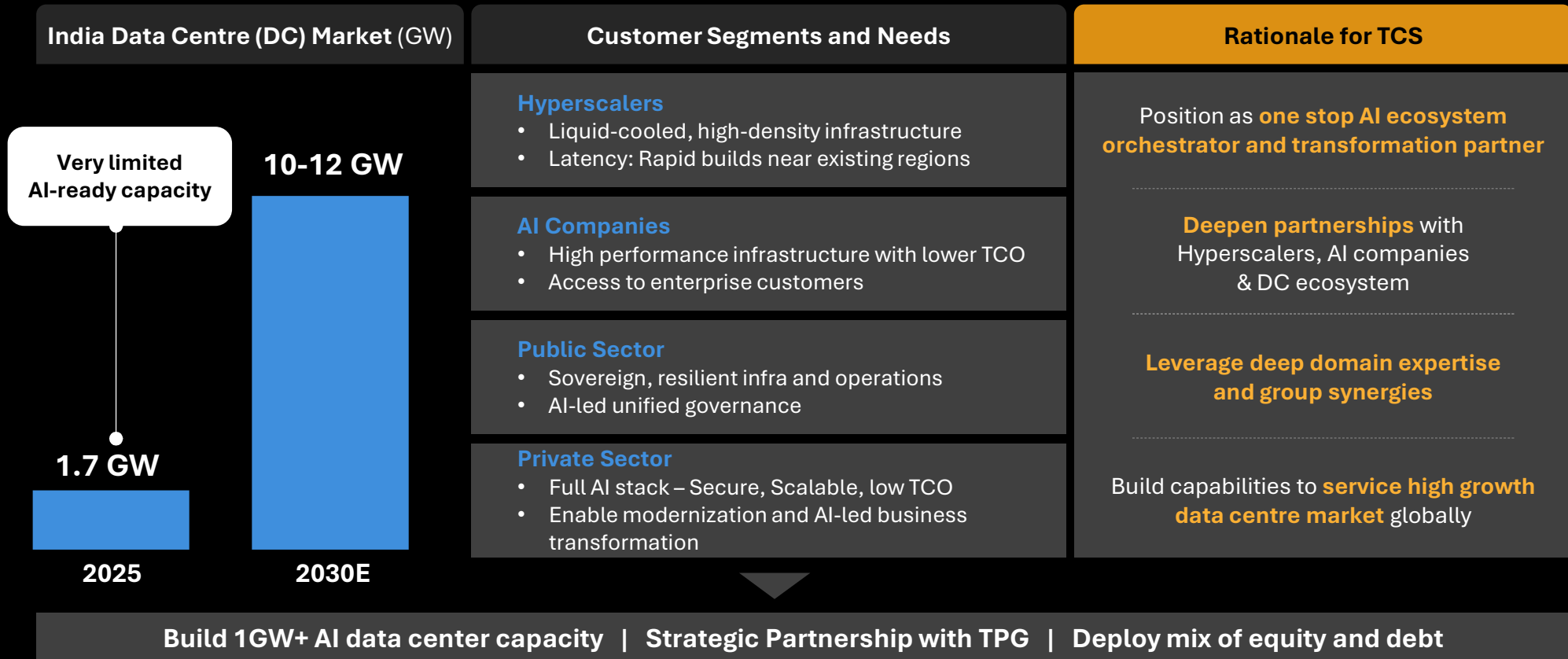
Partner

AI native, Hyperscalers &
Big Tech

Acquire

M&A, Top talent

Build: AI infrastructure to enable full stack AI services



Partner: 360° collaboration with Hyperscalers, AI innovators, DC ecosystem

Key Focus areas:

AI Services

AI Infra

Cyber security

Cloud

Enterprise Solutions

Digital Engineering






Players

- **AI companies:** Models, Compute, Software
- **Hyperscalers**
- **Enterprise applications**
- **Sector-specific players**
- **Industrial OEMs**

Partnership framework

- **Mutual services:**
AI Infra adding a new dimension to the partnership
- **Growth focus:**
Joint focus on scaling revenue, market reach
- **Innovation and co-development:**
Collaborative development of next-gen solutions

Select examples

	AI, Cloud, Modernization, Industry Solutions
	Cloud-native innovation, AI workflows
	AI-led business transformation
	Agentic AI solutions
	AI-powered front-office transformation

Acquire: Strengthen our positioning to drive AI-first transformation

Key M&A Objectives

Accelerate AI capabilities
Tech & Advisory

Build deep domain expertise in high-growth areas
Cyber security, Cloud, Digital Engineering, Enterprise Solutions

Enhance market access

Case Study

Market:

\$20B Salesforce services market in 2025 → \$ 30B by 2030

Strategy:

Leverage M&A to become Top 5 global Salesforce advisory firm

tcs + LISTENGAGE + Coastal^{PR}

- 1 Boosts **AI advisory services** for enterprises
- 2 Enhanced portfolio to cover all **major Salesforce capabilities** (multi-cloud)
- 3 Deepened **strategic partnership with Salesforce**
- 4 **Cover key market segments** including mid-market
- 5 Onboarded **500+ seasoned talent base and leadership team**

Post acquisitions, TCS's portfolio now has all major SF capabilities and market coverage

Company	Area	Core areas (~70% of market)				Emerging areas				Market coverage
		Services	Sales	Mktg.	Commerce	Experience	Data	AI & Agentic	Industry Clouds ¹	
Combined Capabilities	Overall									Large + MM
	Advisory									Large enterprises (BFSI, MFG)
	Implementation									
	Managed Services									
LISTENGAGE	Advisory									Large enterprises (Retail, FS, HC)
	Implementation									
	Managed Services									
Coastal TM	Advisory									Large enterprises & Mid-market (CBG, CMI)
	Implementation									
	Managed Services									

Strong capability
Medium capability
Low capability
No offerings

Thank you