

BUSINESSGPS

THE CAPABILITY BRIEF

The Capability Brief

TCS reports annualised AI revenue of US\$3.1 billion, more than 10% of its revenue. Ask where your integrator's agents work without your people.

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On 8 October 2026 Tata Consultancy Services (TCS) reported “Annualized AI Revenue at US\$ 3.1 billion in Q2FY27, crosses 10% of Revenue”. TCS defines that category; the figure is one quarter multiplied up to a year, and is no measure of AI agents in delivery. We read that release and EY’s of the same day, because EY also sells AI services. Neither says which tasks in a client’s change programme the firm’s agents do, and neither gives a measure of what the client’s own staff can run afterwards.

We think the integrators are industrialising their side of change, doing it at volume with software; neither release measures your side, your own capacity to change. Check who on your own staff is close to your integrator’s work.

This page gives you one question for your integrator and one list of names to write.

Neither release says which tasks in a client’s programme the firm’s agents do

An AI agent is software that carries out a task, such as drafting a design document.

Date	Firm	What was said, or what is due
8 October 2026	TCS, press release	“Annualized AI Revenue at US\$ 3.1 billion in Q2FY27, crosses 10% of Revenue”. TCS defines the category; the figure is one quarter annualised, and no measure of agents in delivery.
Monday 12 October 2026	HCLTech	Results due.
Wednesday 14 October 2026	Accenture	Accenture Investor Day.
Thursday 15 October 2026	Wipro	Results due.

Each release names kinds of work where the firm uses AI: TCS names application management and infrastructure operations, EY names audit. Neither says which tasks in a client’s change programme the firm’s agents do, and neither gives a measure of what the client’s own staff can run afterwards. TCS’s results call of 8 October 2026 comes nearest: in Investing.com’s transcript it describes one unnamed client’s S/4HANA programme and says it is “using AI to redesign processes and accelerate implementation”, without saying which work its agents do.

A release written for investors is not where that would be said. Your contract, your plan and your integrator are, which is why the question is yours to ask.

We think results like these leave you one question: who among your own people is close to the work your integrator’s agents do?

TCS’s release gives no measure of what a client’s own staff can run afterwards. HCLTech’s results are dated Monday 12 October 2026 and Wipro’s Thursday 15 October 2026. We expect neither to give one. We are wrong if either does; then ask your integrator for the same measure.

Price one year of paying outsiders to run what your staff cannot

If your staff cannot run a part of the system after go-live, who is paid to? With illustrative figures, 6 people at £900 a day for 220 working days is £1,188,000.

For your own figure, use your managed-service quote, or the day rate and outside names on your cutover plan.

Ask your integrator where its work has none of your staff close to it

We think that when an integrator builds at the speed of its agents, your own people fall behind it: they become the bottleneck, or sign off faster than they can check, unless you plan for it.

At your next steering meeting, ask:

Where on our programme are your agents and your people working with none of our staff close to the work?

A useful answer lists the work, with a name of yours or a gap beside each.

Write down who on your staff supports each part on go-live day

Birmingham City Council went live with Oracle in April 2022, and on 11 February 2025 its auditor, Grant Thornton, reported that the council “did not equip itself with sufficient in-house skills, capacity and experience in key programme management roles”. The report is about one council’s governance of its programme; it gives no verdict on the council’s suppliers and mentions no AI agents.

List the parts of your system, such as the general ledger, supplier payments and payroll. Beside each, write the name of one of your staff who can support it on go-live day and has hours released from present work to learn it. A name counts if that person can say what the part should do, see when it has gone wrong and know who fixes it.

Done when: every name sits beside a part of the system, and every part without a name shows as an empty space.

BusinessGPS publishes The Capability Brief. Get the weekly email at capability.ai/newsletter.

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