ISG Provider Lens®

ServiceNow Ecosystem Partners

Innovation on ServiceNow

ServiceNow partner evaluation on competitive strengths, service portfolio and innovation potential

Customized report courtesy of:

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ServiceNow Ecosystem undergoes the shift from technical implementation to strategic readiness

ServiceNow has emerged as a cornerstone of digital transformation across APAC, evolving from a cloud-native platform into a central *AI agent control tower* for enterprise workflows. As a market leader, it is rapidly advancing towards autonomous, multi-agent systems through strategic platform releases supported by a mature ecosystem of specialised service providers. This report explores the strategic shift towards agentic AI and the role of providers in advancing the vision of an autonomous, multi-agent enterprise.

The global technology landscape is being reshaped by converging macroeconomic and geopolitical forces. The International Monetary Fund and the Organisation for Economic Co operation and Development forecasts describe a *steady but divergent* global economy, with 2026 GDP growth holding at 3.3 percent, driven largely by rising investment in AI and digital infrastructure that offsets trade disruptions and the tariff escalations of early 2025.

Geopolitically, the world has shifted towards *multipolarity without multilateralism*, with the WEF identifying geoeconomic confrontation as 2026's top risk. Governments are increasingly adopting economic nationalism, treating AI and data infrastructure as strategic assets. This move has accelerated sovereign AI programs and pushed supply chains from cost focused offshoring to risk managed regionalisation.

For enterprise workflow platforms, the shift re-orients organisations from global standardisation towards resilience. Companies must navigate fragmented regulatory environments, such as EU DORA and APAC cybersecurity regimes, while relying on AI driven productivity to counter rising labor costs and inflation. The technology agenda is no longer only about innovation; it now requires secure, compliant and increasingly autonomous operating platforms that operate effectively across a fractured global landscape.

As **AI** raises implementation **barriers**, providers must evolve into **trusted AI GRC advisors**.

The APAC market for ServiceNow is undergoing a bifurcated transformation. Mature markets, such as Australia and New Zealand (ANZ) and Japan, are driving deep, regulation-heavy modernisations focused on data sovereignty and technical debt reduction. Meanwhile, emerging markets across ASEAN and India are leapfrogging legacy stages, adopting multicloud modernisation and greenfield AI at pace. The overarching 2026 narrative has shifted from digital transformation to AI readiness and sovereign resilience.

ServiceNow has set aggressive regional targets, with providers noting an objective to double APAC revenue within three years (from $1 billion to $2 billion), implying a massive acceleration in license consumption and service delivery.

1) The *sovereign fortress*: security and localisation as primary differentiators

In the ANZ public sector and regulated industries, including BFSI, sovereign capability has become the top buying criterion. Both global SIs and local boutiques now compete on data residency, cleared personnel and sovereign delivery models.

- **Rise of sovereign delivery (ANZ):** Several ANZ owned and operated providers are building propositions around IRAP assessed SOCs, private cloud options and AGSVA cleared workforces hosted in protected regions. These offerings target risk averse federal clients, where offshore access is increasingly unacceptable.
- **Japan's hyperlocalisation:** Japan demands deep cultural and technical localisation, where global templates often fail due to language, process nuance and service expectation gaps. Innovative, region specific use cases, such as AI-enabled disaster relief automation, illustrate Japan's unique adoption curve. Local incumbents rely on co delivery models to introduce risk, procurement and back office modules into a market historically cautious about non core expansions.

2) AI adoption: high appetite versus *governance first* reality

Despite intense enthusiasm around GenAI, actual deployment is constrained by cost value scrutiny and governance requirements, placing APAC in a *high appetite, low readiness* phase.

- **Cost-value gap:** Buyers express interest in AI add ons but frequently deem premium SKUs expensive, shifting conversations from efficiency to policy, safety and compliance. Many clients now insist on governance and risk frameworks before turning AI features on.
- **Preparation over execution:** Organisations are pausing to fix foundations: CMDB remediation, CSDM alignment and rolling back heavy customisations to out of the box standards. Clean, well modelled data is essential to minimise hallucinations and misinference before activating AI.
- **Agentic AI and the future of work:** While agent to agent (A2A) use cases are emerging faster in North America, APAC remains focused on multicloud modernisation to support autonomy at scale. Frameworks to control agent sprawl and secure cross platform collaboration, such as trusted agent huddles, are becoming best practices for safe orchestration across multiple agent ecosystems.

3) Industry verticalisation: retail as APAC's *white space*

With IT workflows nearing saturation in mature enterprises, providers are pivoting to industry specific plays with retail representing APAC's largest underpenetrated opportunity.

- **Retail opportunity:** Retail service management (RSM) platforms are viewed as an over $25 billion global opportunity, with APAC penetration still relatively low compared with the Americas. Vendors are rolling out RSM for store operations, safety and compliance at scale, citing early marquee outcomes in large, federated retailers.
- **Public sector and utilities:** The public sector remains a stronghold, with government portfolios doubling for certain players through sovereign delivery. In utilities and manufacturing, expansion into OT — connecting the shop floor, grid

and service desk — is a priority where end to end incident to resolution drives transformational ROI.

4) Consolidation and the *Power of One*

APAC enterprises show growing fatigue with fragmented vendor landscapes and multiple platform instances, driving a regional consolidation wave.

- **Consolidation mandates:** Buyers across APAC and adjacent regions are consolidating infrastructure, applications and BPO under fewer partners to reduce overhead and governance burden.
- **Instance unification:** Major programs now target a single platform instance — the Power of One architecture — to reduce TCO and rationalise duplicative workflows. Recent exemplars include national health consolidations and multi workflow unifications in complex, distributed enterprises, often executed on compressed timelines.

Outlook to 2026: From *system of record* to *system of action*

Platforms are evolving from ticketing to the enterprise nervous system — detecting, deciding and doing.

- Unified observability (twin towers): Providers describe a convergence between observability, such as APM and logs, and service management, where the platform does not just log an event; it autonomously detects and resolves via AIOps. Strategies increasingly integrate observability telemetry directly into workflow automation to deliver autonomous resilience.
- Client zero and co creation: Most partners are becoming their own reference customers (client zero), running GenAI at scale internally and showcasing outcome telemetry. Others are co developing A2A patterns with platform vendors, using R&D capabilities to shape roadmaps rather than simply implementing them.
- Autonomous managed services: Managed services will shift from reactive ticket handling to proactive observability, utilising AIOps and self-healing infrastructure to resolve issues before they affect users.
- Zero-copy architectures: The widespread adoption of zero-copy connectors will allow enterprises to leverage AI agents across massive data estates, such as Snowflake and Oracle, without the cost or latency of data replication.
- Governance at scale: As agent sprawl becomes a risk, tools such as AI Control Tower and frameworks such as the Trusted Agent Huddle will become essential for managing multi-agent collaboration securely.
- Human-centric evolution: Sustained value will depend on robust ModelOps and AgentOps to ensure that while AI handles routine work, humans remain in the loop for critical decision-making and ethical oversight.

The sovereign AI model defines APAC in 2026

APAC customers will demand the efficiency of autonomous agents but only within strict, localised governance boundaries. Winning providers will move beyond staff augmentation to deliver:

- Sovereign ready operations (cleared personnel, in region hosting, IRAP/ISO aligned controls)
- Verticalised IP (retail, government, utilities/OT) with outcome based delivery that self funds via efficiency
- Standard first architectures (CSDM/CMDB hygiene, minimal customisation) to safely activate AI
- Consolidated, single instance designs that reduce TCO and enhance control
- Agentic AI governance to prevent sprawl and ensure secure A2A collaboration across ecosystems.

The era of *customise everything* is over. An era of AI orchestrated, sovereign operations has begun, where platforms function as secure, compliant, autonomous systems of action across an increasingly fractured global landscape.

Service providers across APAC are reshaping their operations, moving from technical implementation to delivering measurable business outcomes. They are developing proprietary IP and vertical solution accelerators through platform marketplaces to speed deployments and differentiate beyond staffing. Global firms are acquiring local specialists to strengthen sovereign delivery capabilities and deepen their presence in regulated sectors such as public services and BFSI.

Provider Positioning

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	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
AC3	Leader	Leader	Not In
Accenture	Leader	Leader	Leader
Advance Solutions	Product Challenger	Contender	Contender
Atos	Product Challenger	Product Challenger	Product Challenger
Birlasoft	Contender	Contender	Not In
Capgemini	Leader	Leader	Leader
Coforge	Product Challenger	Leader	Rising Star ★
Cognizant	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader

Provider Positioning

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	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
DXC Technology	Leader	Leader	Leader
EPAM Systems	Not In	Contender	Not In
EY	Market Challenger	Market Challenger	Market Challenger
Fujitsu	Leader	Leader	Leader
Genpact	Product Challenger	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Leader
IBM	Market Challenger	Product Challenger	Product Challenger
Infobeans	Product Challenger	Not In	Contender
Infosys	Leader	Leader	Leader

Provider Positioning

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	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Inmorphis	Product Challenger	Product Challenger	Product Challenger
InputZero	Product Challenger	Not In	Not In
KPMG	Market Challenger	Market Challenger	Market Challenger
Kyndryl	Product Challenger	Leader	Product Challenger
LTM	Product Challenger	Product Challenger	Product Challenger
NTT DATA	Leader	Leader	Leader
Orange Business	Contender	Product Challenger	Product Challenger
Randstad Digital	Contender	Product Challenger	Contender
TCS	Leader	Leader	Leader

Provider Positioning

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	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Tech Mahindra	Product Challenger	Product Challenger	Leader
Unisys	Contender	Contender	Contender
UST	Contender	Contender	Not In
ValueFlow	Contender	Contender	Contender
Veracity	Contender	Contender	Not In
Versent (Epicon)	Rising Star ★	Rising Star ★	Product Challenger
Virtusa	Product Challenger	Product Challenger	Product Challenger
Wipro	Leader	Leader	Leader
YASH Technologies	Not In	Contender	Not In

The **ServiceNow Ecosystem Partners 2026** study highlights the latest partner developments shaped by rapidly evolving enterprise needs.

- **ServiceNow Consulting and Implementation Services (Professional Services)**
- **ServiceNow Managed Services**
- **Innovation on ServiceNow**

Simplified Illustration Source: ISG 2026

Definition

ServiceNow is a key driver of digital transformation, offering a cloud-native platform that streamlines enterprise workflows across industries. As a market leader, it is rapidly evolving with a growing focus on AI and automation, supported by a mature ecosystem of providers delivering specialised, outcome driven services.

Recent platform releases mark a strategic shift towards agentic AI, transforming enterprise workflows into autonomous, multi-agent systems. Yokohama and Zurich introduced foundational capabilities, including Vault for security, Machine Identity Console, and agentic workflow design with DevOps integration, that enable secure, scalable AI deployment.

With Gartner forecasting that over 60 percent of enterprises will adopt AI agent platforms by 2029, ServiceNow is positioning itself as the central AI agent control tower. The Zurich release advances this vision with Build Agent and vibe coding, allowing natural language prompts to generate production-ready applications. The Developer Sandbox ensures safe experimentation, while Agentic Playbooks and Now Assist deliver automation with human oversight. ServiceNow's strength lies in its ability to act as an integration mesh, connecting best-of-breed agent platforms such as Google Agentspace, AWS Bedrock, Microsoft Copilot and Anthropic.

Trusted by over 80 percent of Fortune 500 companies since 2021, it leverages Workflow Data Fabric (WDF), Knowledge Graph and CSDM to unify enterprise data. For partners, the opportunity is to deliver modular, composable agentic workflows aligned to GRC requirements, underpinned by domain expertise and outcome-driven models. Sustained value will depend on robust ModelOps, LLMOps and AgentOps capabilities to ensure compliance, debiasing and dynamic updates across industries.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following three quadrants for services/solutions: ServiceNow Consulting and Implementation Services (Professional Services), ServiceNow Managed Services and Innovation on ServiceNow.

This ISG Provider Lens® study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant service providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

This ISG Provider Lens® study offers IT-decision makers: Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing provider.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens® quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens® quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Innovation on ServiceNow

Who Should Read This Section

This report is valuable for service providers offering **ServiceNow solutions** in **APAC** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Chief strategy and innovation professionals

Should read this report to understand how service providers support ServiceNow innovation via competitiveness and long-term growth. It offers insights into providers' ability to deliver disruptive solutions using AI, workflow intelligence and automation, enabling strategic planning for future-ready enterprises and accelerating digital transformation initiatives within the ServiceNow ecosystem.

Business line managers

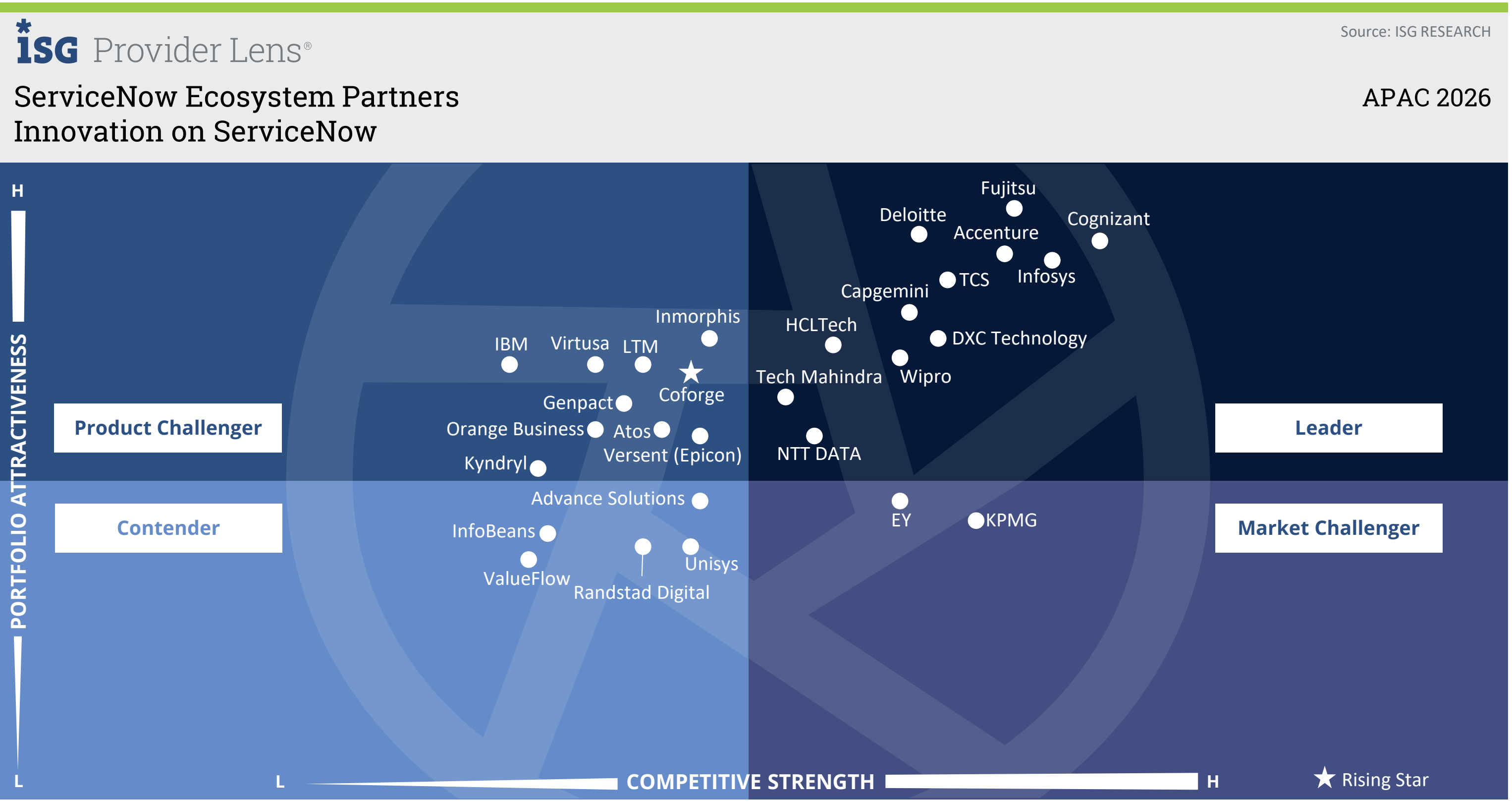
Should read this report to explore ServiceNow's IT and non-IT capabilities, including Built with Now and Built on Now solutions. It explains how service providers support innovations to help achieve cost-reduction goals, improve CX and accelerate digital transformation across business units while ensuring scalability and operational agility.

Engineering teams

Should read this report to gain insights into software development on ServiceNow, including the development of intellectual property assets, accelerators and industry-specific applications. It highlights best practices executed by service providers for leveraging App Engine, Integration Hub and Workflow Data Fabric to create scalable, innovative solutions that meet evolving enterprise needs and industry standards.

Technology and application development professionals

Should read this report to learn about the latest ServiceNow features, functionalities and integration options. It provides insights into how service providers configure AI Agent Studio, deploy GenAI workflows and utilise low-code platforms to deliver advanced enterprise solutions that enhance agility and drive measurable business impact.



This quadrant assesses providers that drive digital transformation by creating innovative **solutions on the NowAssist platform** and demonstrating strong expertise in **enabling agentic workflows**, a key priority within the ServiceNow ecosystem.

Ashwin Gaidhani

Definition

This quadrant evaluates providers that design, engineer and operationalise innovations on the ServiceNow AI Platform, integrating AI agent orchestration, workflow data foundations (WDF) and AI experience into secure, reusable, outcome-driven solutions. Providers must architect robust WDF (CMDB/CSDM); govern source-of-truth stores, such as RaptorDB; and enable model grounding, lineage and policy controls. They must demonstrate expertise in Generative AI Controller for safety, telemetry and cost governance and productise Now Assist across applications.

On the *build* side, providers must industrialise Build with Now, using Creator/Studio, AI Search, App Engine Studio, Flow Designer, Integration Hub and Automation Center, to create agile workflows and automate processes. Proof points include agentic use cases, accelerators, scoped apps, CI/CD pipelines, testing rigour and upgrade-ready patterns. Competency is measured by time to value, Pro/Enterprise feature adoption, experience uplift, risk reduction and scalable platform economics achieved through governed, data-aware, AI-assisted builds.

Eligibility Criteria

1. **Data foundation mastery:** Proven expertise in designing robust CMDB/CSDM structures to support intelligent, scalable workflows
2. **AI agent and model proficiency:** Use of Generative AI Controller and AI agents for complex orchestration and automated decision-making, backed by referenceable case studies
3. **Custom application development:** Substantial experience in building scalable, complex apps using App Engine Studio, with a portfolio of deployed business applications
4. **Advanced automation and integration:** Expertise in enterprise-grade automation through Flow Designer, Integration Hub and Automation Center to streamline end-to-end processes
5. **GenAI integration experience:** Ability to embed GenAI into custom solutions using Now Assist Creator, Studio and AI Search for intelligent UX
6. **Workflow Data Fabric expertise:** Experience in building high-performance, data-intensive apps, leveraging Workflow Data Fabric beyond standard modules
7. **Innovation portfolio:** Ability to showcase unique, market-differentiating solutions combining ServiceNow AI Platform's build and intelligence capabilities to address novel business challenges

Observations

Innovation in the APAC ServiceNow ecosystem is currently defined by the rapid operationalisation of agentic AI and the development of autonomous agents that act as the new workforce. Providers are moving beyond simple conversational chatbots to building complex agent ecosystems that can reason, plan and execute tasks across systems. Accenture and TCS have established dedicated AI factories and innovation hubs to build and test these agents, with Accenture introducing frameworks such as the Trusted Agent Huddle to manage secure collaboration between ServiceNow agents and those from other platforms. DXC Technology is also aggressively building a proprietary catalogue of AI agents for functions such as fraud detection and autonomous claims management, moving innovation from theoretical proofs of concept to deployable assets that deliver immediate ROI.

Another major innovation trend is the architectural shift towards Zero Copy data integration and the use of ServiceNow as a system of action over a system of record.

Partners are leveraging ServiceNow's Workflow Data Fabric (WDF) to connect with external data lakes such as Snowflake and Databricks, without replicating data, allowing for real-time decision-making on massive datasets. Fujitsu and Cognizant are at the forefront of this trend, advocating for hybrid data strategies in which intelligent agents process data residing on external platforms while ServiceNow orchestrates the final business workflow. This approach allows clients in APAC, particularly in data-heavy sectors such as banking and telecommunications, to leverage their existing data investments while using ServiceNow to drive operational agility.

From the 36 companies assessed for this study, 29 qualified for this quadrant, with 12 being Leaders and one Rising Star.

Accenture is pioneering the Trusted Agent Huddle, a proprietary framework designed to facilitate secure multi-system agent collaboration. Addressing the critical future challenge of agent sprawl, this framework creates a secure environment where ServiceNow agents can interoperate with agents from other platforms, such as Salesforce and SAP.

Capgemini closely collaborates with ServiceNow and hyperscalers to align innovation with platform roadmaps and enterprise AI governance. Its innovation focuses on enterprise ready AI, industry relevance and scalable platform IP that delivers measurable business outcomes.

Cognizant's strength lies in translating ServiceNow's platform, AI and GenAI vision into enterprise grade, industry relevant and governable solutions, especially where scale, regulation and operational complexity matter.

Deloitte introduced over 100 turnkey agentic AI capabilities, developed in partnership with Google Cloud and ServiceNow, enabling cross platform multi agent ecosystems. These agents cover customer service, financial services, HR, procurement, legal, healthcare and more, offering a structured pathway for rapid AI scaling within enterprises.

DXC Technology demonstrates strong proficiency in agentic AI orchestration to enable autonomous, multi-agent workflows. By embedding Now Assist and custom AI skills into workflows, DXC accelerates the adoption of next-generation capabilities while maintaining governance and security.

Fujitsu has received several ServiceNow awards in the APAC region, including the Japan Transformation Partner of the Year and the APAC Technology & Employee Workflow awards. These recognitions highlight its excellence in driving large-scale digital shifts and AI-first business models in the APAC market.

HCLTech utilises its four-offering structure, driven by proprietary IP, specifically ValueNow (for assessing technical debt and value) and ComplyNow (for security and risk). These value builders allow the company to move conversations from technical implementation to measurable business outcomes and ROI.

Infosys is innovating in the global business services space by replacing manual, email-heavy processes with a unified ServiceNow engagement layer. In source-to-pay operations, it has transformed procurement for major clients in the mining, telecommunications and manufacturing sectors, including moving e-catalogue buying and supplier onboarding onto ServiceNow.

NTT DATA offers specialised AI readiness consulting, using proprietary toolsets to audit a client's CMDB and data quality before deploying advanced modules such as Now Assist or agentic AI.

TCS' growing ServiceNow Store portfolio, embedded partner motion and industry solutions such as Future Stores and Telecom Tower Management reinforce secure, reusable, outcome driven innovation at scale. The company has strong momentum in APAC.

Tech Mahindra strengthens its market position through joint GTM motions with ServiceNow. They are jointly developing solution roadmaps within industries where mature offerings are still emerging, allowing industries to anticipate unmet needs, define industry blueprints early and consistently deliver outcome-driven value ahead of peers.

Wipro has shifted its innovation focus from simple automation to an AI-first model, using GenAI and agentic AI to drive autonomous business actions evidenced across several customer success stories.

Coforge (Rising Star) has made significant strides with ServiceNow in the past few years. It opened a GenAI CoE on the ServiceNow platform, launched its SmartGen agentic AI offering on the ServiceNow Store and received a position on the ServiceNow Product Advisory Council for multiple industries.

DXC Technology

Leader

"DXC Technology is a strategic partner for large-scale IT modernisation and industry-specific digital transformation. It focuses on highly regulated sectors and uses its AI innovation CoE to deliver tangible business outcomes rather than theoretical PoCs."

Ashwin Gaidhani

Overview

DXC Technology is headquartered in Virginia, US. It has more than 120,700 employees across over 70 countries. In FY25, the company generated $12.9 billion in revenue. DXC offers a range of innovation assets, including scoped applications and accelerators on the ServiceNow Store. It has a pipeline of AI agents for rapid business outcomes and reusable components for complex workflows, reinforcing its differentiation in innovation delivery. With delivery centres in India, the Philippines, Singapore, Vietnam and Australia, DXC enables scale, proximity and multilingual support for complex, multi-country programs.

Strengths

AI innovation CoE: DXC has evolved its GenAI CoE into the AI innovation CoE, focusing on moving AI from theoretical proof of value to full-scale implementation. It is an early participant in ServiceNow's exclusive access programme for A2A and model context protocol (MCP) integrations and has developed a proprietary catalogue of AI agents for functions such as ticket triage, fraud detection and autonomous claims management.

GenAI integration leadership: DXC embeds GenAI capabilities into custom ServiceNow solutions using Now Assist Creator, AI Search and App Engine Studio. This integration powers intelligent UX, automated content generation and predictive insights. DXC's proven ability to operationalise GenAI, from proof-of-value pilots to enterprise-scale deployments, helps clients achieve measurable efficiency gains, rapid development cycles and enhanced digital experiences.

AI innovation framework: The cornerstone of DXC's new-age offering is the Validated Intelligence for Next-Gen Enterprises (VYNE) framework, which serves as an intelligent connective layer between data, systems, and autonomous AI agents across the IT, HR, risk and finance domains. DXC has used VYNE to deliver AI use cases in weeks, cutting time to value by up to 50 percent.

Caution

DXC Technology must continue to invest heavily in niche certifications such as Certified Master Architects (CMA) and Certified Technical Architects (CTA) to ensure it designs scalable, future ready architectures aligned with CSDM, enterprise strategy and multi platform integration, critical for large, complex deployments.

Appendix

The ISG Provider Lens® 2026 – ServiceNow Ecosystem Partners study analyses the relevant software vendors/service providers in the Asia-Pacific market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of March 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

All revenue references are in U.S. dollars ($US) unless noted otherwise.

The study was conducted in the following steps:

1. Definition of ServiceNow Ecosystem Partners market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
    * Strategy and vision
    * Innovation
    * Brand awareness and presence in the market
    * Sales and partner landscape
    * Breadth and depth of portfolio of services offered
    * Technology advancements

Lead Author

Megha Dodke
Lead Analyst

Megha Dodke joined ISG as a Research Specialist in October 2024. Based in Bangalore, India, she holds a Master's degree in Marketing and a certification in Product Strategy from the Indian Institute of Management, Kozhikode (IIM-K). Megha brings over 12 years of diverse experience in Business Research, Market and Competitive Intelligence, Sales Enablement, and Strategic Advisory across multiple industry verticals.

At ISG, Megha focuses on enterprise platform research, with a specialization in areas such as Enterprise Service Management (ESM), ServiceNow, Salesforce and Workday. She has a strong track record of conducting in-depth research and analysis on emerging technologies, market dynamics, and the capabilities of IT service providers—including consulting, managed services, implementation, and innovation.

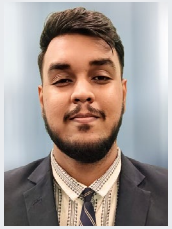
Her work supports clients through strategic advisory, briefings, workshops, and consulting engagements. Prior to this, she has worked with organizations including HP Inc., Accenture, Talent Neuron and Transparency Market Research.

Lead Author

Ashwin Gaidhani
Lead Analyst

Ashwin Gaidhani has over 22 years of experience as an SME, advisor, practitioner and researcher in ESM and emerging technologies. He has worked as a global practice leader and an executive-level advisor in ESM, automation and cloud technologies, covering business transformation, ITES & ITIS, AIOps, CloudOps, metrics-driven practices. As an ISG Lead Analyst and research partner for studies related to hyperscalers such as AWS and Google, ESM services and platforms, and intelligent automation, he defines and leads the ISG Provider Lens™ research projects for the markets in the U.S. and Europe. With his extensive experience in service management, Ashwin has worked in technology operations, business consulting and advisory roles for large Global System Integrators (GSIs), independent software vendors (ISVs) and technology services companies. He is highly qualified and experienced in offering guidance on technology practice adoption across industries such as BFSI, manufacturing and retail.

Enterprise Context and Global Overview Analyst



Arnab Das
Research Analyst

Arnab is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens studies on Oil & Gas and ServiceNow respectively. He supports the lead analysts in the research process and authors the enterprise context and global summary reports with market trends and insights.

He carries out research delivery for both primary and secondary research capabilities. Arnab comes with 2 years of experience across business, technology and academic research and writing.

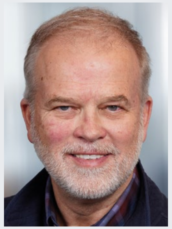
Study Sponsor

Heiko Henkes
Director & Principal Analyst, Global IPL Content Lead

Heiko Henkes serves as Managing Director and Principal Analyst at ISG, where he oversees the Global ISG Provider Lens® (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as strategic program manager and thought leader for IPL Lead Analysts. Additionally, Henkes heads the Star of Excellence, ISG's global customer experience initiative, steering program design and its integration with IPL and ISG's sourcing practice.

His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding of continuous transformation, IT competencies, sustainable business strategies, and change management in a Cloud-AI-driven business landscape. Henkes is renowned for his contributions as a keynote speaker on digital innovation, where he shares insights on leveraging technology for business growth and transformation.

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens®

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens®

The ISG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners. ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this webpage.

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The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

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