

ServiceNow Ecosystem Partners

ServiceNow Managed Services

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-orientes 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.



Executive Summary

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


	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

	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

	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





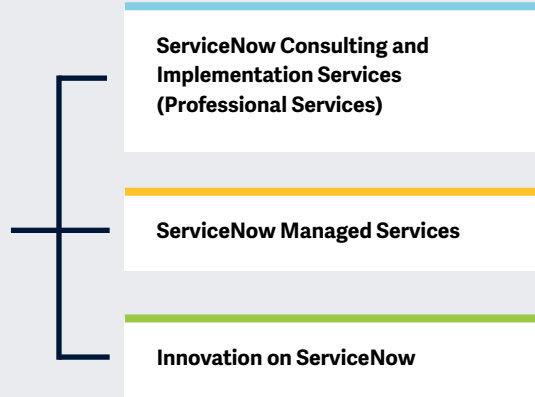
Provider Positioning

	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.



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.

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.

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.

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.





ServiceNow Managed Services

Who Should Read This Section

This report is valuable for providers offering **ServiceNow managed services** in **APAC** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights providers' ability to deliver continuous improvement, AI-driven monitoring and cost optimisation in managed ServiceNow environments.

Strategy professionals

Should read this report to evaluate providers' capabilities in managing ServiceNow environments across portfolios. It offers insights into service providers' governance models, SLA-driven performance and cost optimisation strategies that align with enterprise goals for resilience, scalability and operational excellence while ensuring compliance and risk mitigation.

Service delivery professionals

Should read this report to understand how managed service providers maintain service quality, ensure compliance and deliver uninterrupted platform performance. The report offers actionable insights into proven operational practices, automation-driven monitoring, proactive issue resolution and AI-enabled observability, enabling professionals to benchmark and adopt strategies that enhance reliability and efficiency across the ServiceNow ecosystem.

Service line and functional professionals

Should read this report to rationalise the fitment of ServiceNow resources and workflows across IT and business services. The report offers clarity on how providers are offering managed services to optimise resource allocation, improve process efficiency and support enterprisewide service delivery while reducing operational overhead and complexity.

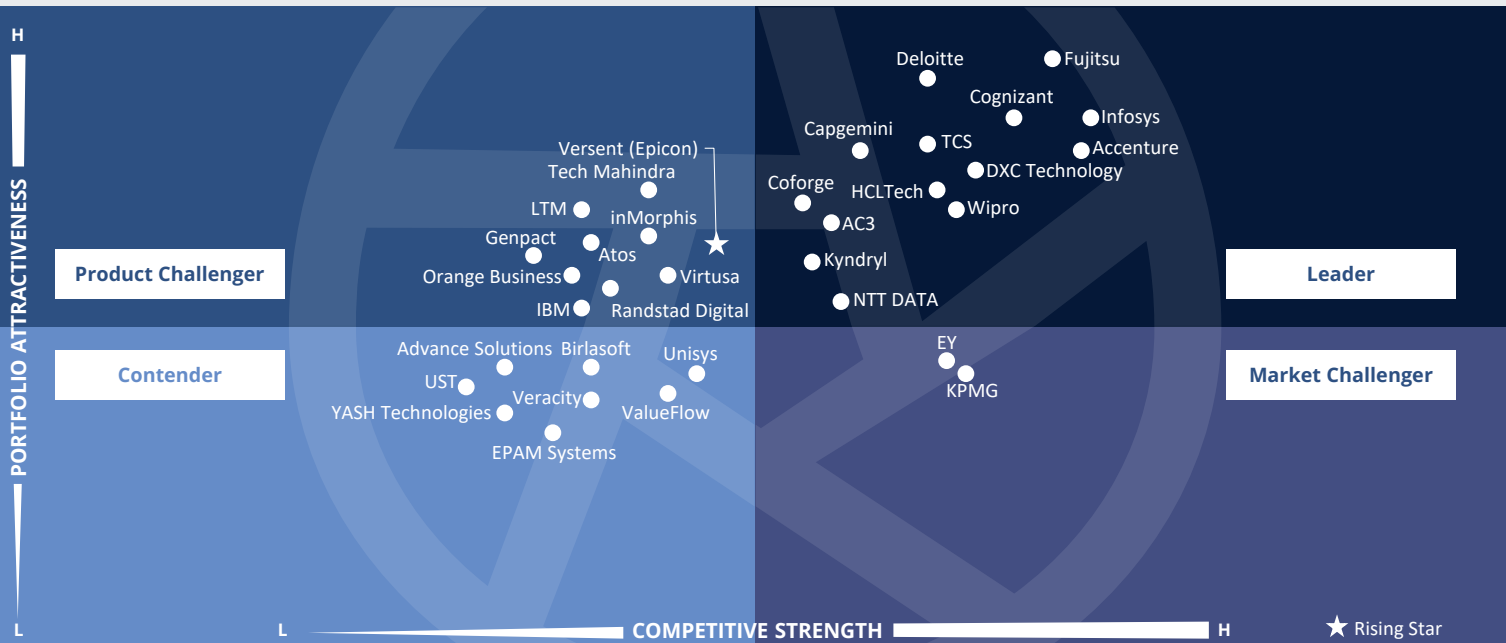
Operations managers

Should read this report to learn how managed service providers ensure platform stability, risk management and cost efficiency. It explains service providers' approaches to AI-enabled observability, license optimisation and continuous improvement for long-term operational success. These practices help organisations achieve predictable performance and measurable business outcomes.



ServiceNow Ecosystem Partners
ServiceNow Managed Services

APAC 2026



This quadrant evaluates **provider capabilities** to manage the **operational health and performance** of the ServiceNow platform, including **CloudOps, FinOps and RiskOps**, to deliver a seamless and reliable experience for enterprise clients.

Megha Dodke



ServiceNow Managed Services

Definition

This quadrant assesses providers that operate the Now Platform as a business-critical service, managing, securing and optimising it end to end. The scope includes platform operations anchored by an AI governance control tower for observability, risk and financial oversight. Key capabilities span CloudOps (event management, topology, AIOps) to ensure availability and SLO compliance; FinOps for cost optimisation; RiskOps integrating IRM/GRC, privacy and audit; and managed AgentOps for safe, scalable Now Assist/GenAI deployment.

The quadrant also evaluates platform performance through personalisation, optimisation and ServiceNow Impact-driven value realisation. Providers must deliver platform modernisation (adoption of latest releases and features, de-customisation), digital experience management (agent/end-user experience, XLAs), and process mining to accelerate automation and maturity. Success is

measured by automated operations, governed AI use, predictable release cycles, cost savings, improved experience metrics and compliance, delivered through proactive SRE services and outcome-based KPIs.

Eligibility Criteria

- 1. Comprehensive platform operations:** Ability to manage holistic operations, including CloudOps for unified observability, FinOps for TCO optimisation, and integrated RiskOps (GRC) for stability, cost-efficiency and compliance
- 2. AI governance and management:** Ability to implement a robust AI governance framework, such as a control tower, to oversee, monitor and report AI usage and performance
- 3. Value realization framework:** Proven success in driving measurable business outcomes through structured programmes aligned with ServiceNow Impact
- 4. Platform modernization**
- 5. Digital experience monitoring:** Ability to offer services that track and enhance user satisfaction, engagement and adoption across the platform
- 6. Process mining and automation:** Expertise in leveraging process mining to identify inefficiencies and deploy intelligent automation for ongoing service improvement
- 7. Unified observability on Now:** Ability to provide native, real-time visibility into operational health, security and performance metrics on the Now Platform



ServiceNow Managed Services

Observations

The APAC managed services market is shifting from reactive support to modernisation in run and increasingly autonomous operations. Providers now compete not on ticket resolution speed but on their ability to prevent incidents using AIOps and proactive observability. Epicor and DXC Technology are leading this shift by integrating ServiceNow with platforms such as Dynatrace and Splunk to deliver unified observability, enabling automatic anomaly detection and self healing workflows without human intervention. Coforge is also promoting a modernisation in run model, using its AIOps platform to reduce technical debt and automate routine tasks so the ServiceNow estate continues to evolve throughout the contract lifecycle.

Sovereignty and security have become critical differentiators in ANZ and Japan. Both GSIs and local specialists are restructuring delivery models to offer sovereign managed services that keep data onshore and restrict access to security cleared personnel. NTT DATA leverages sovereign infrastructure in Japan to

manage sensitive government and financial workloads without compromising compliance or data residency.

Commercially, managed services are shifting towards outcome based and as a service pricing. Clients expect partners to share risk and reward tied to platform efficiency. Infosys and Tech Mahindra are piloting models where billing is linked to outcomes, AI resolved interactions or reductions in operational backlog, rather than resource hours. The rise of agentic AI is accelerating this shift: as TCS deploys autonomous agents to handle routine L1/L2 tickets, providers are moving clients from FTE based pricing to value based contracting, enabling AI driven efficiencies to self fund further innovation and platform expansion.

From the 36 companies assessed for this study, 34 qualified for this quadrant, with 14 being Leaders and one Rising Star.

AC3

AC3 differentiates itself through a fully Australia and New Zealand (ANZ)-based ServiceNow workforce and no offshoring. As a 100 percent Australian-owned provider, it emphasises sovereign operations, appealing to government and highly regulated APAC clients.

accenture

Accenture stands out as the most mature and future-ready ServiceNow application management services (AMS) partner, combining global scale, AI-driven operational transformation, strong co innovation with ServiceNow and repeated ecosystem recognition.

Capgemini

Capgemini delivers integrated IT and business-run services by managing ITSM alongside HR, customer and operational workflows, enabling true ESM. Its robust global delivery model combines onshore, nearshore and offshore centres.

Coforge

Coforge's AMS operate on its Single Structure model where delivery and sales are integrated to ensure accountability. Its approach combines proprietary Modern Runoperations powered by its Helios 3.0 AIOps platform with a strategic focus on back-to-box remediation to reduce technical debt.

cognizant

Cognizant was elevated to a Global Elite partner in 2025 for its ability to deliver AI-augmented operations at scale, strong customer success, and broad specialisations, including Now Assist/GenAI capabilities.

Deloitte.

Deloitte, through its work on emerging Agent2Agent interoperability standards, is shaping AMS' future with multi agent ecosystems, cross platform workflows and integrated run operations. Deloitte's Operate services act as continuous innovation engines, not traditional steady state support.



ServiceNow Managed Services



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



Fujitsu embeds AI governance frameworks into its managed services, using control tower principles for safe, compliant adoption. By aligning AI rollouts with security and compliance standards, the firm enables organisations to scale AI confidently while minimising risk and ensuring ethical use.

HCLTech

HCLTech's AI-native model has achieved a 35-45 percent reduction in operational effort and significant backlog reductions. It is transitioning from ticket-to-hour to outcome-based models that prioritise automation coverage and mean-time-to-resolution improvements, keeping instances AI-ready.



Infosys, as part of its Cobalt portfolio, embeds Cloud FinOps into managed services, with proprietary tools for cloud cost transparency, budgeting and forecasting integrated into ServiceNow's interface. This integration lets clients optimise cloud rate and usage effectively.

kyndryl

Kyndryl's managed services do not just patch software; they prioritise vulnerabilities based on the business criticality of the infrastructure they manage, ensuring the most mission-critical systems are shielded first.



NTT DATA integrates ServiceNow, including AI-enabled capabilities, into customer solutions and its own operations to drive efficiency and measurable outcomes.



TCS' ServiceNow managed services shift from traditional support to an AI-driven, outcome-oriented model that emphasises platform maturity and cost efficiency.



Wipro pioneered a first-of-its-kind Azure Marketplace deal, hosting ServiceNow as an MSP so clients can use Microsoft Azure Consumption Commitments to fund transformations.



Epicon's (Rising Star) parent company, Telstra, received a majority investment from Infosys in August 2025. This will shift Epicon's roadmap from being a high end ANZ boutique to a scaled platform execution arm within Infosys' global strategy, while remaining dominant in regulated industries.





“DXC Technology’s integration of ServiceNow with platforms such as Boomi for integration and Dynatrace for observability enables autonomous unified resilience, allowing the platform to monitor, orchestrate and resolve issues with minimal human intervention.”

Megha Dodke

DXC Technology

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 leverages a highly certified ServiceNow workforce and mature CloudOps, RiskOps and FinOps capabilities to ensure platform stability, compliance and cost optimisation. Its Co Create Delivery model, AI enabled observability and proactive governance support modernisation and technical debt reduction. A strong ANZ presence, especially in the public sector and heavy industries, combined with a data sovereignty led full stack approach with around-the-clock coverage, reinforces DXC’s reliability.

Strengths

Digital experience optimisation: DXC prioritises end-user and agent experience through XLAs, real-time analytics and proactive service enhancements. Its approach includes process mining to identify inefficiencies and deploys automation to improve workflow maturity and self-service adoption. This sustained focus on experience optimisation drives higher satisfaction, faster resolution times and improved productivity across enterprise operations.

Value-realisation framework: DXC’s managed services are anchored in a structured value-realisation framework aligned with ServiceNow Impact. This model tracks KPIs such as adoption, experience metrics and ROI to ensure each engagement delivers measurable business outcomes.

By embedding governance and continuous improvement cycles, DXC helps clients achieve accelerated time to value, improved UX and sustained operational efficiency.

Industry-specific accelerators: DXC differentiates its offerings through domain-aligned solutions for financial services, insurance, manufacturing and the public sector. Examples include Assure BPM for insurance, which integrates AI, data and workflows to reduce process debt and improve compliance, and OT optimisation for manufacturing, delivering 50 percent downtime reduction and enhanced operational visibility. These accelerators enable rapid deployment and measurable business impact.

Caution

DXC Technology should advance its *Platform X* concept into a proactive, AI-driven governance hub and position it as a market differentiator. It should focus on prioritising accelerated GenAI value for APAC public sector and healthcare clients by automating complex document processing and managed service response cycles.





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



Author and Editor Biographies

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.



Author and Editor Biographies



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.

Enterprise Context and Global Overview Analyst

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.



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.

Study Sponsor

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.



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