

Mainframes — Services and Solutions

ServiceNow Managed Services

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

Customized report courtesy of:



Executive Summary	03
Provider Positioning	08
Introduction	
Definition	12
Scope of Report	13
Provider Classifications	14
Appendix	
Methodology & Team	23
Author & Editor Biographies	24
About Our Company & Research	26

ServiceNow Managed Services	15 – 21
Who Should Read This Section	16
Quadrant	17
Definition & Eligibility Criteria	18
Observations	19
Provider Profile	21

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European ServiceNow environments are shifting from isolated projects to consolidated, AI-driven operations

The 2026 ServiceNow Ecosystem Partner report for Europe spans three areas: consulting and implementation (C&I), managed services and innovation on ServiceNow, to help enterprises and partners navigate an environment characterized by an accelerated shift from only technical deployments to advisory-led, upgrade-safe modernization and AI governance at scale.

Europe's ServiceNow market has entered an execution phase defined by sovereignty, governance and consolidation across the enterprise environment. Enterprises are elevating ServiceNow from a stack of workflow modules to a regulated backbone for operating at scale, where AI is embedded in workflows but operated under strict policy, audit and data residency controls. Buyers are concentrating investments in the BFSI, healthcare and

life sciences, telecom and manufacturing industries and the public sector. They are increasingly demanding compliance-ready, industry-specific accelerators that compress time-to-value while aligning with European privacy and regulatory expectations.

Service providers, in turn, are reshaping offers around upgrade-safe architectures, outcome-based and XLA-based managed services and governance by design, such as AI control towers, lineage and rollback, to ensure ServiceNow's Zurich release capabilities can be adopted without destabilizing estates. Packaged fast-track entries, especially in parts of DACH, are reducing procurement friction for regulated and midmarket buyers, while co-innovation labs and agent factories are closing AI readiness gaps and turning pilots into governed productions.

Market context: The forces reshaping the European ServiceNow ecosystem and market

Europe's ServiceNow market is recalibrating around sovereignty, governance and resilience. Specifics and other characteristics of the current market are summarized below.

Clients are **pivoting to AI-governed, upgrade-safe delivery** as agentic platforms reshape demand.



Sovereignty and GDPR-first design: Buyers are embedding data residency, security controls and auditability into their reference architectures, preferring packaged, compliance-ready solutions when risks are high, or teams are thin. This approach is most visible in markets such as Germany.

AI-governance as baseline: Nearly every provider now positions AI and GenAI embedded in workflows as table stakes, with a growing share operationalizing agentic AI, such as Agent2Agent (A2A)/Model Context Protocol (MCP), for cross-domain workflows. They are also prioritizing control towers and clear policy guardrails before AI goes live.

Single-platform backbone: To reduce tool sprawl and enhance control, European enterprises are consolidating functions around ServiceNow as a *platform of platforms*, integrated deeply with ERP/CRM/cloud estates and security layers. The aim is to establish a single, coherent operating model that simplifies upgrades and enables safe AI scaling.

Verticalization at scale: Providers are now focusing on industry-specific accelerators and

blueprints across BFSI, healthcare, telecom and manufacturing industries and the public sector, reflecting buyers' preference for pre-modeled data and controls that comply with regulations while accelerating value.

Regulations and compliance requirements: GDPR, the Digital Operational Resilience Act (DORA) and the Network and Information Security Directive 2 (NIS2) shape architecture decisions; data sovereignty/data residency is table stakes in regulated industries and the public sector.

Ecosystem maturity: Providers are emphasizing upgrade-safe builds, standardized data models (CSDM/CMDB) and prebuilt accelerators to scale safely.

Buyer needs and sector priorities: Prominent developments are seen across specific market segments that include a customer service management (CSM) tilt in discussions and interest in configure-price-quote (CPQ) functionality for complex manufacturing contexts and ServiceNow momentum in the public-sector.

Provider posture: It is becoming increasingly common for partners and customers to expand their co-innovation initiatives with ServiceNow. Within innovation, agent factories, innovation labs and pan-European credential pools for the purpose of staffing multitower reinventions are all on the rise.

Enterprise priorities: How European enterprises are adopting and scaling

We often see the following activities and motivations among ServiceNow customers in Europe:

Foundation before AI: Organizations are standardizing on back-to-box delivery, CSDM/CMDB hygiene and knowledge/data readiness to avoid debt before enabling Now Assist or multi-agent orchestration. Clean models and governed operating practices are enabling them to reduce risks, contain costs and facilitate audits.

Governance-first activation with measured value: Organizations are shifting from time-consuming pilots to short, well-instrumented deployments that clearly compare pre- and

post-KPI metrics, such as MTTR, deflection, accuracy and rollback rates, and convert those results into XLA constructs for the run phase. Cost-sensitive public programs, in particular, demand fail-fast value windows that can withstand procurement review.

Consolidation and cross-suite orchestration:

Many client organizations are executing a *platform of platforms* strategy by connecting ServiceNow with ERP, supply chain management (SCM), CRM, security and other enterprise systems to create end-to-end workflows. Examples include a source-to-pay (S2P) workflow that manages disputes and connects with logistics systems, featuring agentic AI that can supervise and act upon events without breaching sovereignty guardrails.

Vertical-specific priorities:

- **Public sector** clients are focusing on sovereign hosting and fixed-scope templates to de-risk delivery.



- **BFSI** firms are emphasizing DORA-aligned risk workflows and accelerators. They also want ServiceNow consolidation with their outcome-based run operations and commercial models backbone.
- **Manufacturing** companies are now focusing on *platform of platforms* orchestration, with observability and ITSM convergence. There is also rising CPQ interest among organizations engaged in complex manufacturing.
- **Telecom and retail** firms are emphasizing CSM/CRM uplift, AI-infused workflows and experience dashboards oriented toward value realization.

Outcome over activity: Clients want to base their service provider fees on XLA and ROI performance, rather than on work hours. Providers that offer experience/value dashboards and can demonstrate capabilities in regular upgrades are achieving growth.

Provider dynamics: How supply is reorganizing to meet European demand

From blueprint to compliance-ready reality: Consulting and implementation in Europe are fostering value discovery, alongside

upgrade-safe delivery by embedding Now Assist and governed agent libraries from design through run. Vertical blueprints for industries such as BFSI, telco, manufacturing, retail and the public sector are enabling rapid approvals in risk-averse environments. Co-innovation with ServiceNow Labs, partner-led build cycles and early-access collaboration are rising to close the AI readiness gap while maintaining governance.

Run with governance for modern operations in a regulated continent: Run models are shifting toward AI-governed operations that fuse CloudOps/AIOps with SRE to target autonomous L1/L1.5, proactive remediation and measurable MTTR improvements as business-as-usual (BAU). FinOps and RiskOps (IRM/ GRC, privacy and audit) are integrated to keep AI-driven change compliant, while continuous modernization, such as de-customization, upgrade hygiene and instance rationalization, are executed in run under managed AgentOps. Sovereign delivery, including C5-certified operations, SOC/security information and event management (SIEM) integration and identity and access management (IAM)/pluggable

authentication modules (PAM) patterns support GDPR/DORA/NIS2 mandates.

From experiments to industrial-grade AI: Innovation has matured into repeatable, upgrade-ready patterns such as agentic AI, multi-agent orchestration and AI Control Towers that are treated as standard building blocks, while implementations stay close to out of the box (OOTB) with strong CSDM/CMDB and workflow data fabric to avoid technical debt. A co-build ecosystem comprising labs and proof-of-production pathways validates guardrails and ties every release to value realization frameworks.

Differentiating motions emerging in Europe: Where providers are doubling down

- sovereign and packaged entry for the German midmarket to meet residency demands and reduce procurement friction.
- platform consolidation advisors to formalize *platform of platforms* roadmaps and cross-suite blueprints across ERP/CRM/security stacks.

- agent factories/CoEs to scale Now Assist and multi-agent designs with governance-as-a-code patterns for lineage and auditability.

Outlook (12–24 months): What to expect and how to prepare:

Baseline trajectory: Sovereign, governed autonomy

European estates will move toward sovereign, governed autonomy where AI driven operations scale only under audit ready controls, standardized governance, and strong data foundations.

- **Compliance-anchored autonomy:** AI control towers and agent lifecycle governance will become standard across estates, balancing autonomy with auditability. AI governed run models for regulated enterprises that demonstrate runtime KPIs such as upgrade cadence, mean time to repair (MTTR), deflection, accuracy and rollback rates, will expand multi-suite managed services.
- **Horizontal expansion into operations:** Cross-pillar orchestration will extend left into manufacturing operations/supply chain and right into distribution/logistics,



linking S2P, disputes, logistics and legal workflows under GDPR-ready guardrails and document intelligence.

- **Consolidation and instance rationalization:** Single backbone designs will continue to cut TCO, strengthen control and operationalize governed autonomy.
- **Ecosystem M&A and cobuild acceleration:** To close skill gaps and accelerate *AI-fication*, providers will partner with or acquire boutique ServiceNow partners, especially those focused on domain agents and governance tooling, while co-developing with field/product teams.

Key risks to manage:

- **AI without data discipline:** Weak CSDM/CMDB/workflow data fabric (WDF) will degrade accuracy and create security risks in regulated workflows.
- **Customization drag:** Over-customization will undermine upgrade cadence and compliance evidence, delaying adoption of new capabilities.

- **Under-governed agent sprawl:** Uncontrolled agents across multiplatform estates will raise audit and operational risks.

Leading indicators to watch:

- Rising sovereign/residency requirements in RFPs, including country-specific hosting and cleared personnel
- Outcome or XLA constructs displacing SLA language in run deals.
- Agent lifecycle governance, such as catalogs, lineage and audit telemetry, appearing in delivery statements of work (SOWs)
- Offers in packaged midmarket expanding in DACH and into Nordics/Benelux with standardized blueprints

What enterprises should do now:

- **Codify governance before AI scale-up:** Establish an AI Control Tower that enforces policy, lineage and rollback; combine Integrated Risk Management (IRM)/GRC from day one; enable agents only under explicit guardrails.

- **Choose upgrade-safe by default:** Mandate Back-to-Box, regression coverage and harmonized release cadences; link milestones to XLA or ROI rather than activity counts.

- **Adopt vertical, compliance-ready blueprints:** Prioritize domain catalogs for BFSI, healthcare, telecom and manufacturing and the public sector to compress time-to-value and reduce audit risk.

- **Consolidate for control and scale:** Architect toward a *platform of platforms* and a single instance where feasible to simplify governance and accelerate adoption.

- **Wire observability into action:** Pair telemetry and AIOps with workflows so that incidents are prioritized by business impact and self-healing is auditable.

What service providers should prioritize:

- **Lead with sovereignty and proof; productize governed agents:** Offer GDPR/sovereign patterns as the standard and deliver agent libraries or A2A embedded

within control tower governance, complete with metric dashboards that stakeholders can defend during audits.

- **Deliver outcome-centric run services:** Pivot to XLA or ROI-anchored models with continuous modernization, such as upgrades and de-customization and measurable automation density.
- **Accelerate consolidation programs:** Build integration guardrails and align on a data fabric to *operationalize the platform* of platforms vision.

Regional hooks (embedded signals across sections)

- **Regulation and compliance:** Compliance with GDPR/DORA/NIS2 that drive sovereign architectures, audit-ready processes and risk-first activation of AI agents; the public sector is prioritizing fixed-scope accelerators and demonstrable controls.
- **Ecosystem maturity:** Robust back-to-box, upgrade-safe builds; disciplined CSDM/CMDB/WDF; broad pan-European credential pools; and an increase in the number of innovation labs and agent factories.



- **Buyer priorities:** Fail-fast ROI with XLA/ outcome tracking in run; CSM on priority; increased CPQ interest; and a unified platform backbone.
- **Provider strengths and positioning:** Sovereign execution, packaged midmarket offers (DACH), AI control towers and *platform of platforms* orchestration emerge as clear differentiators in Europe.


Conclusion: *The rise of the sovereign enterprise with Europe turning governance into a competitive engine.*

Europe's ServiceNow market is crystallizing around autonomy with accountability. Buyers expect AI to be integrated into a workflow, but only under the conditions of sovereignty, security and auditability. They are consolidating into platform backbone architectures; insisting on industry-specific, compliance-ready blueprints; and judging success by provable XLA or ROI telemetry rather than effort expended. Providers that package governance by design, productize agentic capabilities with control towers and sustain upgrade-safe modernization will shape the next phase of

the European ecosystem. The era of bespoke customization is giving way to measurable, sovereign and governed systems of action.


The European ServiceNow ecosystem will reward providers that clearly separate governance consulting from build and prove Now Assist at run time with real KPIs. Success also depends on packaged cross pillar blueprints that meet GDPR and DORA requirements, supported by sovereign options and strong data foundations that allow agentic AI to scale safely.



 Provider Positioning

	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Accenture	Leader	Leader	Leader
agineo	Leader	Product Challenger	Product Challenger
Atos	Leader	Product Challenger	Leader
Bechtle	Not In	Contender	Not In
Brillio	Rising Star ★	Contender	Product Challenger
Capgemini	Leader	Leader	Leader
Coforge	Product Challenger	Product Challenger	Product Challenger
Cognizant	Leader	Leader	Leader
Computacenter	Market Challenger	Product Challenger	Not In
Deloitte	Leader	Leader	Leader



 Provider Positioning

	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Devoteam	Product Challenger	Market Challenger	Product Challenger
DXC Technology	Leader	Leader	Leader
EY	Market Challenger	Market Challenger	Market Challenger
Flyform	Not In	Not In	Contender
Fujitsu	Leader	Leader	Leader
Genpact	Product Challenger	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Leader
Hexaware	Product Challenger	Rising Star ★	Product Challenger
IBM	Product Challenger	Product Challenger	Product Challenger
Inetum	Leader	Product Challenger	Rising Star ★





Provider Positioning

Page 3 of 4

	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Infosys	Leader	Leader	Leader
inmorphis	Product Challenger	Not In	Not In
iTSM Group	Not In	Market Challenger	Not In
KPMG	Market Challenger	Market Challenger	Market Challenger
Kyndryl	Product Challenger	Product Challenger	Product Challenger
LTM	Product Challenger	Leader	Leader
NewRocket	Product Challenger	Not In	Not In
NTT DATA	Product Challenger	Leader	Product Challenger
Plat4mation	Leader	Product Challenger	Product Challenger
Sofigate	Market Challenger	Contender	Product Challenger



Provider Positioning

Page 4 of 4

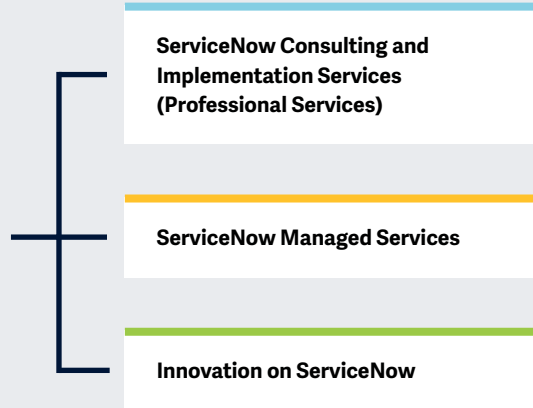
	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Sopra Steria	Product Challenger	Product Challenger	Contender
Stefanini	Contender	Contender	Product Challenger
TCS	Leader	Leader	Leader
Tech Mahindra	Rising Star ★	Leader	Leader
T-Systems/OS	Leader	Leader	Leader
Unisys	Contender	Contender	Contender
UST	Contender	Not In	Product Challenger
Virtusa	Contender	Not In	Not In
Wipro	Leader	Leader	Leader
Wrangu	Contender	Product Challenger	Contender



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 specialized, outcomedriven services. Recent platform releases mark a strategic shift toward agentic AI, transforming enterprise workflows into autonomous, multiagent 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

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

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 **Europe** 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 optimization in managed ServiceNow environments.

Strategy professionals

Should read this report to evaluate service providers' capabilities in managing ServiceNow environments across portfolios. It offers insights into providers' governance models, SLA-driven performance and cost optimization 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 rationalize the fitment of ServiceNow resources and workflows across IT and business services. The report provides clarity on how providers are offering managed services to optimize resource allocation, improve process efficiency and support enterprisewide service delivery while reducing operational overhead and complexity.

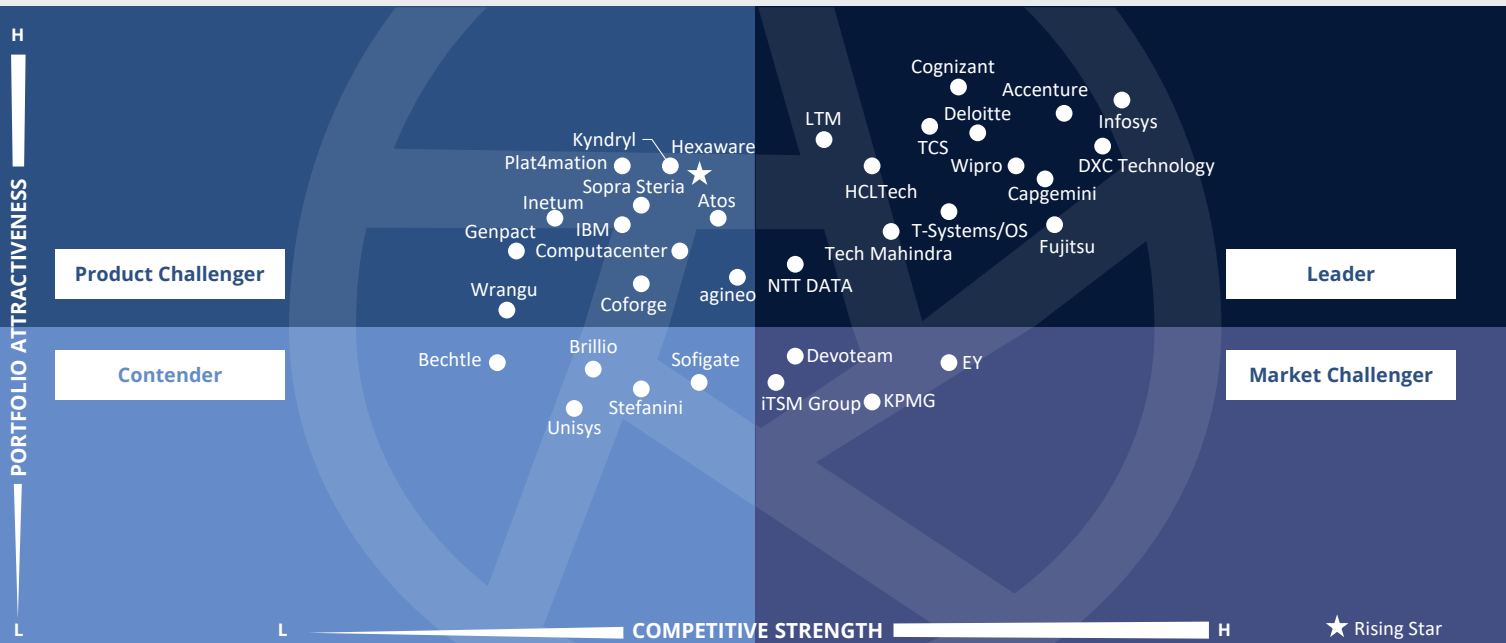
Operations managers

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 optimization and continuous improvement, enabling long-term operational success and helping organizations achieve predictable performance and measurable business outcomes.



**ServiceNow Ecosystem Partners
ServiceNow Managed Services**

Europe 2026



This quadrant evaluates a provider’s ability to run the **Now Platform** through AI-governed operations that integrate **CloudOps, AIOps, SRE, FinOps and RiskOps** to ensure resilient, compliant and continuously optimized enterprise environments.

Ashwin Gaidhani



ServiceNow Managed Services

Definition

This quadrant assesses providers that operate the Now Platform as a business-critical service, managing, securing and optimizing 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 optimization; RiskOps integrating IRM/GRC, privacy and audit; and managed AgentOps for safe, scalable Now Assist/GenAI deployment.

The quadrant also evaluates platform performance through personalization, optimization and ServiceNow Impact-driven value realization. Providers must deliver platform modernization (adoption of latest releases and features, de-customization), 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 optimization 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 programs aligned with ServiceNow Impact
- 4. Platform modernization and performance:** Expertise in continuous optimization, technical debt reduction and seamless upgrades to maintain platform efficiency
- 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

Managed Services across Europe have shifted decisively to an AI-governed run, where estates are operated through control tower guardrails that fuse CloudOps/AIOps with SRE to improve availability, accelerate incident correlation and deliver measurable MTTR gains as part of BAU rather than one-off programs. Financial and risk governance are now embedded into the model, with FinOps ensuring TCO discipline and RiskOps spanning IRM/GRC, privacy and audit, so that platforms remain cost-efficient, compliant and release-ready as they scale. Modernization is ongoing, with service providers combining and integrating de-customization, upgrade hygiene and instance rationalization with managed AgentOps to safely industrialize Now Assist/GenAI, linking these improvements to Impact-style value realization programs and outcome-based KPIs. Sovereignty requirements across the region have raised the architectural bar, introducing sovereign-hosted options, C5-certified operations, SOC/SIEM integration and strong IAM/PAM patterns that comply with GDPR, DORA and NIS2 while maintaining cross-suite performance. Providers such as Accenture

run AI-native operations with a Reinvention Console approach to proactive governance and SRE at scale. DXC Technology pairs AIOps and VYNE-powered governance with CIR playbooks to convert complex estates into predictable run environments.

The overall result is a managed services ecosystem that feels more cohesive, anticipatory and people-aligned. Instead of outsourcing *run*, organizations are partnering for governed autonomy through operations that learn, adapt and elevate experience while keeping European estates compliant, consolidated and future-ready.

From the 40 companies assessed for this study, 35 qualified for this quadrant, with 14 being Leaders and one Rising Star.

accenture

Accenture fosters operational resilience through its AI-native managed services, leveraging the Accenture Reinvention Console to provide proactive, automated platform governance and SRE that reduces technical debt for multinational organizations across Europe.

Capgemini

Capgemini combines its right shore delivery model, GenAI enabled GBS transformations and standardized global operating frameworks to streamline service operations and strengthen enterprise wide governance across managed services.

cognizant

Cognizant secures complex environments through Cognizant Neuro® IT Operations, providing European organizations with an AI-governed control tower that ensures platform stability, regulatory alignment and proactive observability for business-critical digital services.

Deloitte.

Deloitte differentiates its managed services through the *Operate to Innovate* offering, which focuses on outcome-driven transformation and platform de-customization to ensure long-term operational resilience and continuous value realization for established global estates.

DXC

DXC Technology's proactive managed services are paired with VYNE powered governance with enterprise corporate incident response (CIR) models and 24x7 operations, transforming complex estates into predictable run environments and securing multi-year renewals through disciplined KPIs and platform stability

Fujitsu Uvance

Fujitsu's CASE offering blends platform run with value realization and impact entitlements, using AI advisory, CMDB hygiene and GDC capacity to stabilize post migration estates, including retail and lift adoption, experience and governance

HCLTech

HCLTech's managed services offer AI native operations, SIAM as a service models, coupled with continuous platform modernization and reinforced by growing European wins, pre buy MSP motions and structured value governance for long term operational resilience.



ServiceNow Managed Services



Infosys shifts managed services to outcome based models, blending software and run with conversational AIOps, CMDB governance and reinvest to innovate constructs to uplift adoption, experience and risk controls across complex estates.

LTM

LTM positions its managed services through expanded regional delivery centers, AI led platform operations and MSP+ frameworks, helping European enterprises modernize estates and scale resilient, autonomous operations backed by deep certification investments and joint GTM motions with ServiceNow.



NTT DATA, through an expanded AI focused partnership with ServiceNow and the integration of capabilities gained from its acquisition of The Cloud People, enhances its managed services portfolio with multi workflow support for complex enterprise platforms.



TCS is expanding its managed services portfolio by scaling MSP models, infusing agentic operations and tightening license value governance, supported by shared services expansion and stronger regional adoption of outcome focused run frameworks.



Tech Mahindra, with flexible as a service models, DBOT frameworks, shared services delivery and AI driven operational-efficiency layers, enables clients to consolidate platforms, optimize support functions and scale long term ServiceNow operations more predictably.

T Systems

T-Systems/OS offers managed operations by combining multi model delivery options by including ServiceNow Cloud, T Cloud and on premises with long standing SaaS hosting experience, outcome oriented run frameworks and expanding AI governed automation capabilities.



Wipro infuses its WINGS AI powered platform, integrating persona based dashboards, automated transition tooling and Now Assist capabilities to deliver unified run and change services and streamline multi-entity consolidation across complex estates.

HEXWARE

Hexaware's (Rising Star), backed by continued investments in automation, industry IPs and AI governed platforms, offers a managed services portfolio that combines autonomous operations, strong platform governance and security to enhance stability and long term value for clients.





“DXC Technology delivers proactive, governance-driven managed services in Europe, combining VYNE-powered operations, CIR resilience and AI-ready frameworks to ensure secure, scalable and outcome-focused platform performance.”

Ashwin Gaidhani

DXC Technology

Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 120,700 employees across over 70 countries. In FY25, the company generated \$12.9 billion in revenue. The firm stabilizes complex estates, reduces technical debt and embeds modernization cadences. DXC’s VYNE framework and CIR operating model unify incident response across business functions, while AI innovation practices guide safe Now Assist adoption. European engagements highlight structured platform management, unified service catalogues and measurable improvements in experience and compliance.

Strengths

Europe-focused footprint: DXC cites Europe as its largest ServiceNow market, supported by industry-specific operating models across financial services and manufacturing. Its managed services domain includes stabilizing incident, request and change processes, de-customization and technical debt, and driving modernization aligned to business priorities across the European territory.

Incident response operating model: DXC’s CIR model elevates ServiceNow beyond IT into an enterprise resilience platform for European organizations. It provides role-based playbooks integrated with events, CMDB data and executive communications, enabling unified response, faster stabilization and reduced business disruption. DXC implements CIR alongside

ongoing managed services to ensure cross-function visibility and consistent ownership during incidents.

Framework-powered operations: DXC’s VYNE framework strengthens managed services with connected data, systems and agents across IT, CRM, HR, risk and finance, enabling resilient, self-managing operations. VYNE curates accelerators to support adoption and integrates governance into day-to-day platform management. It also strengthens CloudOps via observability and AIOps linkages, including integration with platforms such as Dynatrace, while harmonizing integration fabric with tools such as Boomi to reduce technical debt.

Caution

Although DXC’s delivery footprint is impactful, the company can further benefit by pivoting toward proactive, experience-led innovation. Prioritizing employee-sentiment analytics and agentic, self healing approaches would translate steady uptime into measurable productivity gains and modern workplace transformation at a global scale.





Appendix

The ISG Provider Lens® 2026 – ServiceNow Ecosystem Partners study analyzes the relevant service providers in the European market, based on a multiphased 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

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.



Author and Editor Biographies



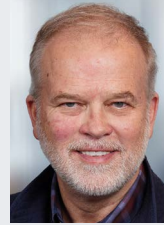
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Heiko Henkes
Director & Principal Analyst, Global IPL Content Lead

Heiko Henkes serves as Director and Principal Analyst at ISG, overseeing the Global ISG Provider Lens® (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as a strategic program manager and thought leader for IPL lead analysts.

Henkes heads 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 known for his contributions as a keynote speaker on digital innovation, sharing insights on using 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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MARCH, 2026



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