

ServiceNow Ecosystem Partners

Innovation on ServiceNow

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

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U.S. ServiceNow ecosystem shifts from technical rollout to governed, outcome-led autonomy

The 2026 U.S. ServiceNow Ecosystem Partner report assesses how service providers are enabling enterprises to convert the Now Platform into a governed system of action, where agentic AI, observability led operations and upgrade safe architectures translate intent into measurable outcomes. The study evaluates three quadrants — Consulting and Implementation, Managed Services and Innovation on ServiceNow. This framework covers the end-to-end functionality of ServiceNow ecosystem and enables service providers and enterprises to shift from strategy to scaled production.

The U.S. landscape has shifted decisively from project-based delivery to advisory led modernization, featuring value engineering upfront and XLA/ROI tracking in run state. Together with platform consolidation and industry blueprints, this shift moves

organizations from isolated deployments to governed autonomy encompassing auditable architectures that can be upgraded and expanded without sacrificing control.

Market context — the forces reshaping the U.S. ecosystem

AI is now the default: In new implementations and in-run operations, U.S. buyers expect Now Assist capabilities and multi-agent patterns (A2A) to be available and safe on day one. Providers are responding to this by embedding AI Control Towers (for model/agent governance, lineage and rollback) directly into reference architectures rather than treating them as optional add-ons.

From observability to autonomy: Large U.S. estates are integrating observability telemetry and AIOps into workflows, enabling the platform to not only log events, but also detect, decide and resolve. As incident priority is tied to business impact, automation density becomes a leading indicator of value, not the number of closed tickets.

Consolidation to a backbone: With budget and risk pressures rising, enterprises are

Agentic AI raises U.S. expectations, pushing partners beyond implementation to strategy.



consolidating point tools and elevating ServiceNow to a platform of platforms, the workflow backbone that orchestrates IT and non IT domains while preserving compliance. This consolidation improves upgrade cadence, data quality and the adoption of new capabilities.

Industry verticalization at scale: Current demand concentrates in BFSI, healthcare, telecom, manufacturing and the public sector, where compliance-ready blueprints and domain data models compress time to value and reduce transformation risk. Buyers increasingly choose providers based on the strength of their ready to deploy patterns.

Emphasizing regulation and compliance: *Secure AI at scale* has become an architectural requirement. AI governance, agent/machine identity, audit trails and sovereign/regulated deployment patterns are expected, especially in BFSI, healthcare and the public sector.

Enterprise priorities — how service providers are adopting and scaling

Start with advisory and value, not build plans: U.S. programs begin with platform fit, CSDM/

CMDB readiness, integration strategy and value discovery (often TBM/FinOps linked). This enables teams to commit to engineering, anchored in upgrade safe, back to box designs that minimize custom debt and preserve release velocity.

Treat AI as a run time operating discipline:

For most clients, *leveraging AI* is insufficient without skills, tuning and governance to sustain outcomes. They deploy Now Assist and agents alongside AI Control Towers and human in the loop controls to keep autonomy safe and auditable.

Consolidate to move faster and spend smarter: Consolidation programs position the platform as the orchestration layer across IT and business operations. This enables consistent data models and accelerates cross suite rollouts, particularly when paired with factory re-platforming and instance consolidation.

Prioritize vertical outcomes over toolkits: Enterprises prioritize industry blueprints that align data, controls and process templates to regulated workflows:

- **BFSI:** Operational resilience and risk workflows with non-negotiable compliance
- **Healthcare/Life sciences:** Member/patient operations, regulatory workflows and experience modernization under strict guardrails
- **Public sector:** Secure/sovereign patterns and packaged templates with governance first AI
- **Telecom and manufacturing:** Observability driven autonomy connecting network/plant telemetry to service workflows

Measure value relentlessly: U.S. clients demand XLA dashboards and outcome contracts that tie funding to adoption and performance (for example, deflection, MTTR and EX/CSAT), with benefit calculators and live telemetry informing renewal and expansion.

Decoding buyer behavior: Deal size is fragmenting downward as midmarket entrants use ServiceNow as a fast path into AI. However, they carry a premium tolerance for governed outcomes rather than raw feature counts. Consulting and implementation are splitting. Pathfinding remains human centric, while

execution is expected to become increasingly automated by agents over time. Consulting and implementation are diverging into two distinct motions: pathfinding remains a human led activity, focused on strategy, value, and governance, while execution is becoming increasingly automated, with agents taking over more delivery tasks over time.

Provider Dynamics — how supply is reorganized to meet U.S. demand

From delivery shops to strategy through run partners: Providers now initiate engagements with advisory to engineering motions, including readiness, roadmaps and TBM/FinOps-aligned value discovery) and conclude on the basis of measured outcomes rather than hours. The common denominator is governance by design, with AI Control Towers, identity/risk guardrails and sovereign/regulated patterns embedded across all architectures, especially for highly regulated U.S. estates.

Productization of innovation: Innovation has moved from slideware to shippable, upgrade ready solutions that combine agentic AI (A2A), observability and industry



IP. Multi agent libraries shift operations from prediction to resolution, while Store/IP accelerators reduce cycle time and drive consistent adoption.

Managed services rewritten: Run organizations are converging CloudOps, FinOps and RiskOps into Managed AgentOps, with human in the loop, XLA contracts and continuous modernization in run (back to box, release discipline, instance consolidation). Success is measured by automation density, governed AI at scale, upgrade velocity and demonstrable ROI.

Alliances and capability depth: Alliances emphasize observability interlocks and data fabric integration to ensure telemetry informs workflow decisions. Tuck in M&A strengthens talent benches and shortens the strategy to execution handoff, which is critical for U.S. enterprises seeking speed without sacrificing control. This enables providers to differentiate by running standardized, upgrade safe builds, shipping vertical playbooks and operating XLA/ROI dashboards in production.

Outlook (12–24 months) — what to expect and how to prepare

Emphasizing governed autonomy at scale:

- **Agents as a standard operating layer:** Expect expansion from L1/L1.5 into complex cross domain handoffs with A2A orchestration and human in the loop approvals.
- **Observability fused with workflows:** Telemetry and AIOps will drive self healing responses linked to business impact, shrinking MTTR while raising reliability.
- **Backbone architectures and data fabric:** Platform consolidation will continue, with CSDM/CMDB and knowledge modernization treated as prerequisites for safe AI scale up.
- **Vertical catalogs as on ramps:** Compliance ready blueprints remain the fastest route to outcomes in regulated sectors.

Key risks to manage:

- **Agent sprawl without control towers:** Absence of AI Control Tower oversight, lineage and rollback mechanisms can stall or reverse autonomy after incidents.

- **Skipping the foundations:** Weak CSDM/CMDB and knowledge hygiene degrade AI accuracy and change reliability, inflating risk just as automation scales.
- **Customization drag:** Heavy bespoke build erodes upgrade velocity and blocks adoption of the new capabilities in the Zurich release. Prioritizing back to box is the preferred default.

Leading indicators to watch:

- Growth in XLA linked commercials and capacity models in managed services
- Rise in pipelines focused on instance consolidation and factory replatforming
- Providers publishing reusable agent libraries and A2A blueprints rather than custom one offs
- Executive scorecards that assess data fabric maturity (CSDM/CMDB completeness and knowledge modernization) prior to AI activation

What enterprises should do now:

- **Institutionalize governance first:** Set up an AI Control Tower with policy, lineage and rollback criteria; mandate human in the loop oversight for material decisions; and align security and compliance artifacts to regulated workflows before scaling agents.
- **Contract for upgrade safe value:** Make back to box requirements, regression coverage and release cadences contractual, as well as link milestone payments to adoption and XLA metrics (deflection, MTTR and EX) rather than activity counts.
- **Integrate observability into action:** Integrate telemetry, service maps and runbooks directly into workflows to ensure incident priority reflects business impact and measure automation density in production.
- **Adopt vertical blueprints:** Select industry catalogs with pre built data and control models for BFSI, healthcare, telecom, manufacturing and the public sector to compress time to value and reduce risk.



- **Budget for AI run time:** Implement post-go-live programs for skills, tuning and guardrails and align managed services to Managed AgentOps with outcome dashboards and continuous modernization in run.

What service providers should prioritize:

- **Governance by default:** Standardize AI Control Towers, identity and access controls, audit capabilities and sovereign/regulated deployment patterns across U.S. regulated verticals;
- **Productize acceleration:** Scale Store/IP accelerators and reusable agent libraries that are upgrade ready and instrumented with before/after scorecards
- **Modernize while running:** Treat back to box, release management and instance consolidation as day 2 services rather than separate projects to ensure innovations in Zurich remain adoptable


- **Sell outcomes, not effort:** Anchor proposals on automation density, upgrade velocity and XLA/ROI telemetry drawn from production, instead of staffing ratios

Conclusion — *The U.S. blueprint for the next ServiceNow decade moves from modernization to measurable autonomy*

The U.S. ServiceNow agenda has evolved from projects delivered to platforms governed. Buyers expect agentic AI to operate under explicit controls, observability to drive self healing operations and upgrade safe design to keep innovation adoptable. Providers that package governance by design, ship vertical blueprints and prove value with live XLA/ROI telemetry will define the next phase of the U.S. ecosystem. The era of customizing everything has ended; the new era of measurable, governed autonomy has begun.


In the U.S., *go live* marks the beginning. Leaders are designing governed autonomy with fixed foundations (CSDM/CMDB), orchestrated agents (A2A), observability infused with workflows and upgrade-safe design, delivering measured, repeatable outcomes.



 Provider Positioning

	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Accenture	Leader	Leader	Leader
Atos	Leader	Leader	Rising Star ★
Birlasoft	Product Challenger	Product Challenger	Contender
Brillio	Contender	Contender	Not In
Capgemini	Leader	Leader	Leader
CDW	Product Challenger	Product Challenger	Not In
Coforge	Leader	Rising Star ★	Leader
Cognizant	Leader	Leader	Leader
Cprime	Product Challenger	Not In	Product Challenger



 Provider Positioning


	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Deloitte	Leader	Leader	Leader
DXC Technology	Leader	Leader	Leader
EY	Market Challenger	Market Challenger	Market Challenger
Fujitsu	Product Challenger	Product Challenger	Product Challenger
Genpact	Leader	Product Challenger	Leader
GlideFast	Rising Star ★	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Leader
Hexaware	Leader	Leader	Leader
IBM	Market Challenger	Market Challenger	Market Challenger






	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Infosys	Leader	Leader	Leader
InMorphis	Product Challenger	Product Challenger	Product Challenger
INRY	Not In	Product Challenger	Not In
Jade Global	Contender	Contender	Contender
KPMG	Market Challenger	Market Challenger	Market Challenger
Kyndryl	Product Challenger	Leader	Product Challenger
LTM	Leader	Leader	Leader
NewRocket	Rising Star ★	Not In	Product Challenger
NTT DATA	Product Challenger	Market Challenger	Leader



 Provider Positioning

	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Orange Business	Product Challenger	Not In	Not In
Pathways	Contender	Contender	Contender
Proven Optics	Not In	Not In	Contender
Randstad Digital	Product Challenger	Product Challenger	Product Challenger
RapDev	Contender	Contender	Product Challenger
SoftwareOne	Not In	Not In	Product Challenger
Stefanini	Contender	Contender	Not In
TCS	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Leader



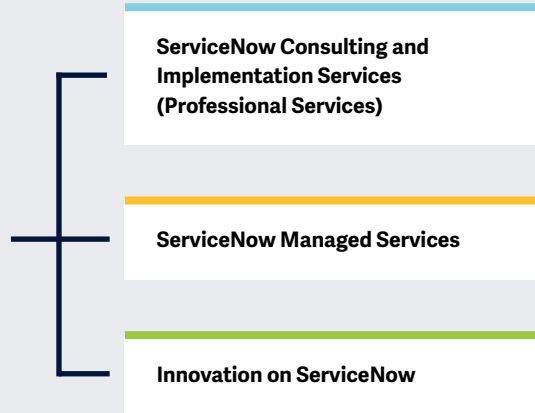
 Provider Positioning

	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Unisys	Contender	Product Challenger	Product Challenger
UST	Product Challenger	Product Challenger	Product Challenger
Virtusa	Not In	Not In	Contender
Wipro	Leader	Leader	Leader
YASH Technologies	Not In	Contender	Contender
Zaelab	Market Challenger	Not In	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 specialized, outcome-driven services.

Recent platform releases mark a strategic shift toward 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

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.

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 the **U.S.** 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.

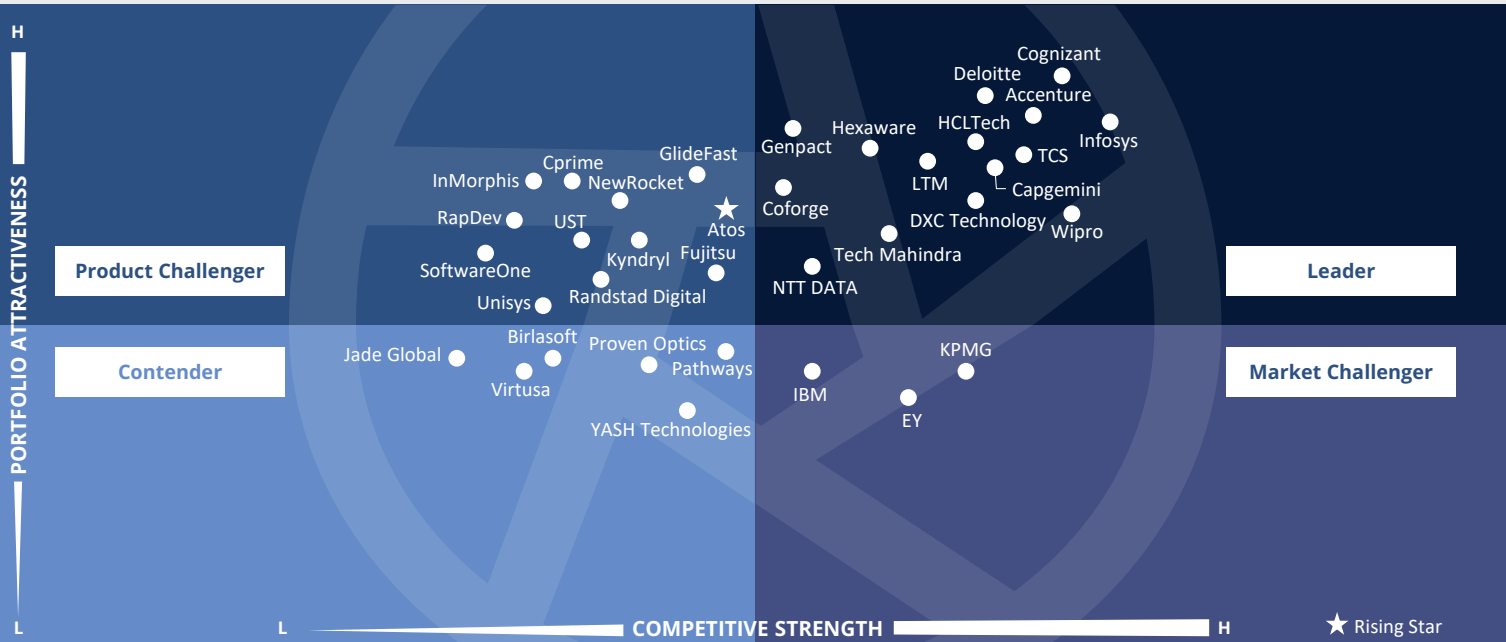
Technology and application development professionals

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 use low-code platforms to deliver advanced enterprise solutions that enhance agility and drive measurable business impact.



**ServiceNow Ecosystem Partners
Innovation on ServiceNow**

U.S. 2026



This quadrant assesses providers that accelerate **digital transformation** by **productizing AI** and **agentic innovations** on the platform such as **Now Assist** skills and **A2A patterns** into governed, cross workflow solutions that scale beyond pilots.

Tapati Bandopadhyay



Innovation on ServiceNow

Definition

This quadrant evaluates providers that design, engineer and operationalize innovations on the ServiceNow AI Platform, integrating AI agent orchestration, Workflow Data Fabric (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 productize Now Assist across applications.

On the *build* side, providers must industrialize 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 rigor

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

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



Innovation on ServiceNow

Observations

The U.S. ServiceNow ecosystem has witnessed the most accelerated growth in terms of innovation in the past 18 months. Innovation is reshaping from slideware to shippable, upgrade-ready solutions that blend agentic AI, observability, governance and industry intellectual property. Service providers are productizing multi-agent patterns using Now Assist skills and agent-to-agent (A2A) interoperability to progress from prediction to resolution across IT, HR, customer and risk workflows. Several of them are fielding large, ready-to-deploy agent libraries and early-access skills that indicate real production scale rather than pilots. While innovation often begins with advisory, the differentiator is engineering discipline. Back to box, upgrade-safe architectures, Store or intellectual property accelerators and factory methods compress release cycles while ensuring seamless adoption of Zurich's new features. Observability-led design converge with AI, including Dynatrace and ITOM interlocks, CMDB hygiene and runbook automation, which tie automation density to business impact in live operations.

Governance is now part of the product, with AI Control Towers, agent and machine identity and audit trails embedded by design, alongside sovereign and regulated deployment patterns that U.S. multi-nationals demand as they operate under strict regimes. Concrete references from service providers suggest substantial shifts. Deloitte highlights over 100 ready-to-deploy agents coordinating enterprise workflows, while HCLTech brings early access participation (NASK/A2A) to strengthen agent skills before the General Availability stage. Conversely, Cognizant is strengthening Agent Foundry/Workflow Data Fabric to operationalize agent networks, and TCS is scaling its innovation with RapidNow accelerators and Crystallus on Now.AI. NewRocket's FlightPath. AI and Intelligent Agent Crew convert an AI-first design into governed releases. On the demand side, BFSI, healthcare, telecom and manufacturing clients seek industry blueprints that bundle data models, controls and process templates to shorten time to value and increase adoption. Funding behavior is also shifting, wherein outcome dashboards, FinOps/TBM and experience KPIs (EX, MTTR and deflection)

are built into innovation programs, making ROI measured rather than promised and rewarding providers that can combine agent networks, observability and governance into modular, upgrade-safe products for U.S. enterprises.

From the 42 companies assessed for this study, 36 qualified for this quadrant, with 15 being Leaders and one Rising Star.

accenture

Accenture excels the next frontier of enterprise automation through its AI Lighthouse program and strategic partnership. It is co-developing agentic AI workflows and Sovereign Cloud solutions that allow highly regulated industries to deploy autonomous, decision-making agents securely.

Capgemini

Capgemini pioneers the *agentic-powered business* by embedding Now Assist and autonomous AI agents into industry-specific workflows, such as DORA compliance for finance, ensuring safe, governed and data-aware innovation across ServiceNow.

Coforge

Coforge focuses on co building with ServiceNow via a steady pipeline of Store apps and GenAI first industry offerings. Using the Helios and Quasar platforms, it turns agentic AI and end to end workflow automation into operational solutions.

cognizant

Cognizant pioneers agentic AI networks that automate multi-step tasks across departments through its AI Lab and Agent Foundry. By integrating Now Assist with proprietary context engineering, it ensures autonomous agents make reliable, situational business decisions.

Deloitte.

Deloitte's Agentic Workforce co-develops multi-agent systems and industry-specific intellectual property, such as FastForward EX and Telco360Connect, integrating Now Assist and Workflow Data Fabric to automate complex decision-making in highly regulated sectors.



Innovation on ServiceNow



DXC Technology's AI Innovation CoE productizes Now Assist skills, bespoke agents and early access A2A/MCP patterns. It launches Assure Smart Apps and domain agents for fraud, policy alignment and ATM/municipal operations to deliver governed, upgrade safe and outcome driven innovation at scale.



Genpact productizes multi agent packs for ITOps and source to pay. It invests in an AI Gigafactory to codify guardrails, industry agents and outcome based adoption through its agentic AI portfolios and A2A patterns with hyperscalers.

HCLTech

HCLTech's innovation centers around AI Factory, A2A orchestration and custom agents and skills on the Store. Co-innovated with ServiceNow and NVIDIA, these capabilities are proven through innovation labs and client zero programs for governed, reusable outcomes.

HEXAWARE

Hexaware's innovation agenda integrates Tensai Agentic Mesh, the DEVIL framework and Now Assist skills with Workflow Data Fabric, productizing store apps and insurance intellectual property, while the CyberSolve acquisition strengthens SecOps and IRM packs and improves AI governance for agentic solutions.



Infosys leads innovation with a GenAI/agentic AI portfolio, an AI Control Tower and agent fabric within its Integrated Platform Solution, and store ready assets from ESM Café that productize Now Assist skills and orchestrate reusable enterprise agents.

LTM

LTM's innovation is driven by autonomous IT, AI-powered CRM and domain solutions such as AI Smart Underwriter, pairing Now Assist governance with reusable blueprints and joint go to market motions to scale agentic use cases.



NTT DATA's AI-native services are led by its proprietary Smart AI Agent™ Ecosystem and specialized AI agents integrated with ServiceNow's Workflow Data Fabric, enabling autonomous, cross-industry process orchestration while maintaining rigorous responsible AI governance.



TCS scales innovation via Crystallus on Now.AI, an Agentic AI Factory and partner-embedded solutions, productizing industry packs and upgrade ready blueprints that integrate Now Assist with data aware workflow foundations.



Tech Mahindra accelerates innovation by integrating agentic AI with Creator/Studio builds and workflow data foundations. It productizes accelerators and scales partner lab co-innovation to deliver governed AI agents and reusable blueprints across diverse domains.



Wipro fosters innovation through Wipro Engineering; industry solutions such as SmartProcure, TelcoAI360 and CyberTransform; and a growing AI influenced pipeline reinforced by Partner Labs, AI hackathons and co-innovation via Azure Marketplace and ServiceNow.

Atos

Atos (Rising Star) differentiates itself across innovation via its new releases such as SecureHorizon, AI programs (AI Ignite/ AI Insight) and Dynatrace ServiceNow observability packages, supported by an AI first investment initiative to productize agentic workflows.





“DXC Technology is driving insights-driven agentic operations on ServiceNow by building and testing workflow automation and multi-agent integrated systems on top of the agentic playbooks available in ServiceNow’s latest releases.”

Tapati Bandopadhyay

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. In the U.S., DXC fosters innovation on ServiceNow through an AI Innovation CoE that operationalizes Now Assist, bespoke skills and early access A2A/MCP patterns to deliver governed, upgrade safe agentic workflows across IT, HR and customer operations. Its CIR model extends ServiceNow beyond IT into enterprise incident response, while integrations with Dynatrace and Boomi strengthen workflow data foundations and observability.

Strengths

Insights-driven agentic operations:

To build on Zurich’s agentic playbooks and intelligent workflow automation, DXC teams are enabling client operating model shifts. ServiceNow’s vision for autonomous IT ensures that AI can resolve issues before human intervention. Taking this vision to execution and ROI, DXC’s strategy is to help U.S. enterprises use AI with data security and GRC so that agentic features are adopted responsibly and integrated with enterprise operating models.

Practical innovations on Now for BFSI:

DXC is leveraging ServiceNow Zurich’s partially prebuilt agentic components and templates, for industry-specific solutions, particularly in insurance and financial services as exemplary gain benchmarks.

Through DXC Assure BPM and other assets, it combines financial domain expertise and ServiceNow’s AI-enabled workflows to modernize policy administration, billing, underwriting and claims. The impact projections include significantly reducing operational costs for insurers.

Domain-specific focus: DXC is integrating Now Assist GenAI at scale through a dedicated CoE and embedding AI-driven workflows into domain-specific offerings to accelerate clients’ digital transformation journeys beyond tactical IT use cases toward strategic operational agility and real ROI.

Caution

DXC is well positioned to publish and lead industry-leading value and impact benchmarks by industry-specific adoptions of ServiceNow GenAI and agentic AI automation for business workflows, starting with insurance. Clients will have these guidance notes for more data-driven competitive evaluation.





Appendix

The ISG Provider Lens® 2026 – ServiceNow Ecosystem Partners study analyzes the relevant service providers in the U.S. 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



Dr. Tapati Bandopadhyay
Lead Analyst

Dr. Tapati Bandopadhyay has been an inventor, builder, practitioner and researcher in AI, intelligent automation and related domains, for 27+ years. She has been a global practice leader and executive-level advisor & consultant in AI-automation-cloud and services management, covering MLOps, AIOps, CloudOps, DataOps, ModelOps & DevOps metrics-driven practices and data and AI story-building and story-telling practices and tools. As an ISG Lead Analyst on AWS and in AI-ML, consulting & managed services, she is responsible for defining and leading the ISG Provider Lens branded research projects for the US market.

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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.

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Study Sponsor

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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

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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®

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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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