

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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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.





	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






	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

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	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

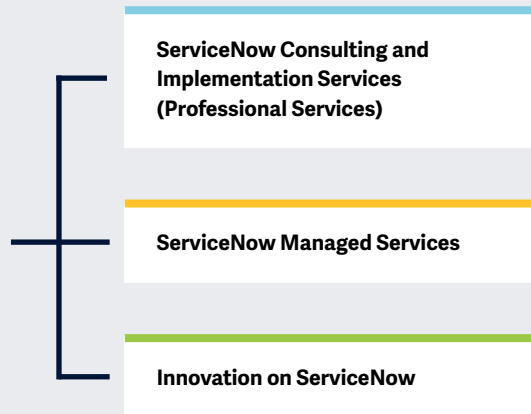


The ServiceNow Ecosystem

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.

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 the **U.S.** 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 providers' capabilities in managing ServiceNow environments across portfolios. It offers insights into service 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

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 offer managed services to optimize resource allocation, improve process efficiency and support enterprisewide service delivery while reducing operational overhead and complexity.

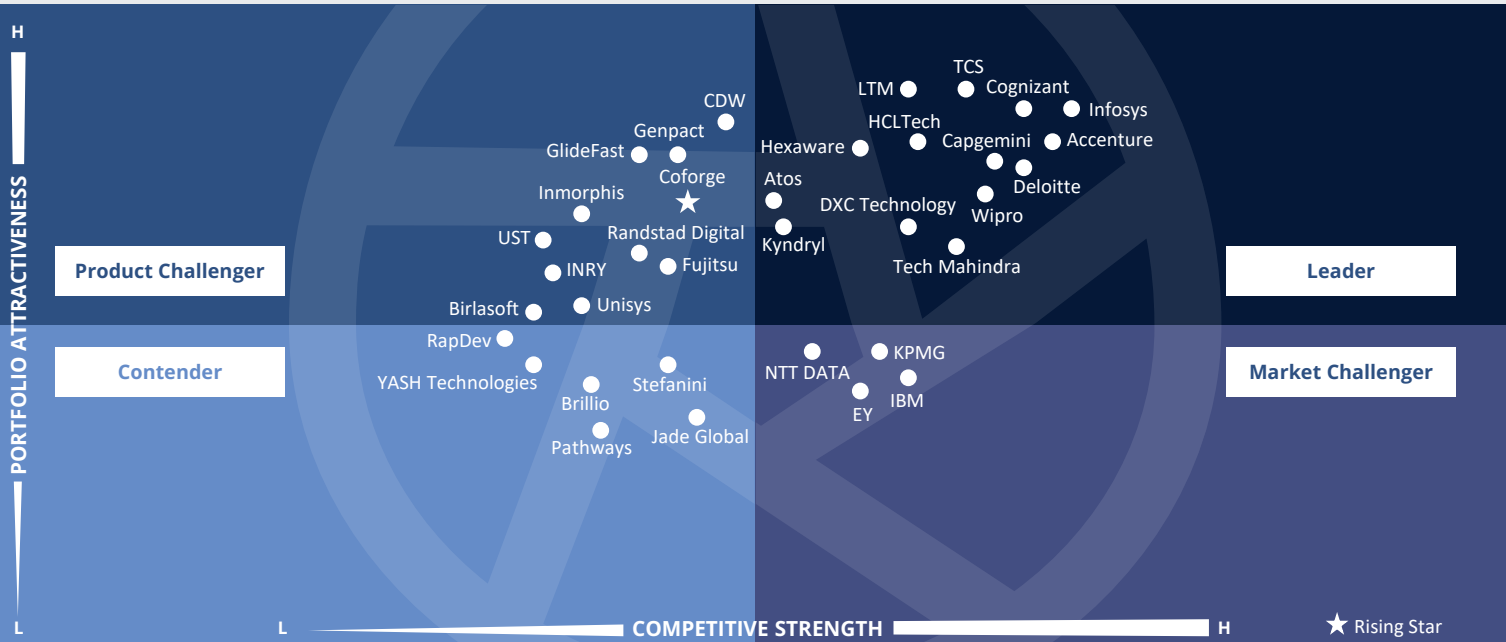
Operations managers

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 for long-term operational success. These practices help organizations achieve predictable performance and measurable business outcomes.



ServiceNow Ecosystem Partners
ServiceNow Managed Services

U.S. 2026



This quadrant evaluates provider’s ability to operate the Now Platform end to end by unifying **CloudOps, FinOps and RiskOps** with governed AI operations, observability and continuous modernization to deliver reliable, measurable outcomes.

Tapati Bandopadhyay



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 has evolved from ticket-based *run* to AI-governed platform operations that unify CloudOps, FinOps and RiskOps under one operating model. Providers are standardizing managed AgentOps, including Now Assist skills, A2A patterns and curated agent libraries, to move from alerts to auto remediation with human-in-the-loop controls, while observability-led practices, such as ITOM, Dynatrace style telemetry, runbooks and CMDB hygiene, tie incident priority to business impact. Over the last 12–18 months, outcome pricing and ServiceNow Impact-aligned value frameworks have become the commercial norm, with leaders measuring EX, CSAT, MTTR and deflection in live dashboards and using benefit calculators to secure renewal and expansion. Modernization now happens in run, with back-to-box refactoring, release management and factory-scale instance consolidation ensuring seamless adoption of Zurich's new features without destabilizing IT estates. U.S. demand is also shifting to verticalized, multi-entity focus where sectors such as banking, healthcare, telecom and the public sector are expecting SIAM/MSP operating models, domain separation and license

optimization packaged as standard catalog items. Governance has become architectural, with AI Control Towers, agent/machine identity, audit trails and sovereign/regulated hosting patterns (including privacy and EU or sector mandates for U.S. multi-nationals) as table stakes. Positioning favors providers that have scaled certified talent and industrialized automation and self-heal, often accelerated by tuck-in M&A to deepen FinOps, AI and talent benches. In summary, ServiceNow managed service offerings in the U.S. are evaluated on automation density, governed AI at scale, upgrade velocity and demonstrable ROI rather than hours consumed. From the 42 companies assessed for this study, 35 qualified for this quadrant, with 14 being Leaders and one Rising Star.

accenture

Accenture dominates the managed services landscape by integrating its global IT customer experience into its service delivery, offering an outcome-based *run* model that leverages ServiceNow Impact to achieve a 50 percent reduction in major incidents for global enterprises.

Atos

Atos strengthens its managed service offering through secure SaaS, on premises and sovereign hosting, SIAM operations and nearshore/offshore delivery, consolidating vendors for clients and improving service quality with proactive governance and around-the-clock platform support.

Capgemini

Capgemini differentiates its managed services through Digital SIAM and outcome-tracked models, leveraging its vast certification pool to achieve up to 50 percent maintenance cost reductions and improved change velocity for multi-vendor, hybrid-cloud ecosystems.

cognizant

Cognizant's managed services are powered by its Neuro IT Operations, an AI-powered platform that enables self-healing environments and proactive management, helping global clients optimize hybrid cloud estates while improving operational velocity and EX.

Deloitte.

Deloitte's ServiceNow managed services leverage the *Operate to Innovate* model, which focuses on platform de-customization and ServiceNow Impact-driven value, ensuring that clients across diverse regions achieve long-term ROI through proactive, automated operations.

DXC Technology delivers proactive, KPI governed managed services that stabilize complex platforms, securing multi-year renewals and expanding regional AMS footprints via CIR operating models, data governance toolkits and autonomous operations patterns to enhance resilience and experience.

HCLTech

HCLTech delivers AI-native managed services with SIAM as a-service, prebuy MSP licensing and *modernization in run*, operationalizing Now Assist and SAM governance to enhance resilience, reduce run costs and sustain compliant, multi entity platform operations.



ServiceNow Managed Services

HEXAWARE

Hexaware scales managed services through HexAssure, implementing multi-entity governance, license optimization and AI Control Tower guided operations, while adding DORA aligned risk workflows and MSP constructs to improve resilience and upgrades across regulated environments.

Infosys

Infosys elevates its managed services via outcome based constructs, FinOps to RiskOps coverage and governed back to box modernization, using ESM Café, license optimization and compliance runbooks to sustain measurable platform performance across regulated industries.

Kyndryl

Kyndryl leverages its AI-powered Bridge platform to deliver zero-touch managed services, integrating real-time AIOps and cyber resilience frameworks that transform complex legacy infrastructures into autonomous, resilient digital estates for enterprises across U.S.

LTM

LTM's ServiceNow managed services unify CloudOps, FinOps and RiskOps under a single operating model, combining instance hardening IP, MSP+ subscription constructs and *Now-on-Now* practices to drive resilient, upgrade ready platform operations.

TCS

TCS' MSP and shared services models embed agent assisted run operations, license value realization and KPI driven governance to modernize platforms and sustain experience and reliability improvements across its managed services portfolio.

TECH mahindra

Tech Mahindra's platform as a service constructs, prebuy/MSP models and DBOT (Design Build, Operate, Transfer) transitions combine governance, release discipline and value tracking to extend run and change operations across technology, customer, employee and industry workflows.



Wipro's AI-led managed services, led by the WINGS platform, combines Now Assist, agent libraries and AI driven transitions to run large, multi entity estates. Supported by prebuy licensing flexibility, this approach ensures measurable gains in productivity, automation and SLA performance.

Coforge

Coforge (Rising Star) differentiates its managed services through a run and enhance model that combines platform governance, AIOps driven accelerators and industry specific operational expertise, enabling stable operations while continuously improving adoption and business value.





“DXC Technology runs enterprises on ServiceNow with CIR resilience, VYNEpowered observability and governed AgentOps, translating incidents, risk and AI into measurable, executivevisible outcomes. powered observability and governed AgentOps visible outcomes.”

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. DXC executes structured, proactive platform management through its ServiceNow managed services to reduce technical debt, improve maintainability and reduce TCO. Its range of industry accelerators includes Assure BPM and Assure Smart Apps for insurers, Corporate Incident Response (CIR) for enterprise resilience and the VYNE framework for connected, autonomous operations. Its AI Innovation CoE operationalizes Now Assist and Agentic patterns, providing early access to A2A and model context protocol (MCP) capabilities.

Strengths

Scale, talent, credibility: DXC’s managed footprint combines over 350 customer instances, 1,800 ServiceNow consultants and more than 70 advanced architects (CTAs/CMAs), and draws from over 15 years of experience in the ecosystem. Global delivery reports a CSAT of 4.54/5 for ServiceNow engagements. This bench provides round-the-clock support, faster routing through platform changes and earlier feature adoption.

Proactive run governance: DXC’s run model replaces reactive support with disciplined governance, transparent KPIs and stabilized ITSM processes. In the U.S., DXC rebuilt a low trust environment through platform and process stabilization, predictable delivery and communication enhancement, leading

to a five-year renewal. It enforces change discipline and automated remediation to establish *silent operations*, sustaining highly reliable, well-governed incidents, request and change workflows long after go-live.

AI governed AgentOps: DXC’s AI Innovation CoE runs a fourphase phase cycle (Discover, Assess, Deploy and Operate) to industrialize Now Assist and agentic skills under governance. The team embeds AI governance from the start and scales it with reusable assets, reducing the time tovalue value of up to 50 percent and delivering production use cases in weeks rather than quarters.

Caution

DXC should further industrialize its AI-powered service portfolio through its strategic ServiceNow partnership. Doing so would enhance platform visibility and strengthen its market traction among large U.S. enterprises seeking autonomous operations.





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.

With more than 25 years of experience focused on AI, ML, data sciences and intelligent automation technology development, strategy and adoption practices across key industries, including BFSI, manufacturing & FMCG, retail, media, hi-tech & telco's, governments and healthcare services.

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



Study Sponsor

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.



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ISG (Information Services Group) (Nasdaq: III) is a leading global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

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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