

# ServiceNow Ecosystem Partners

Enterprise workflow management: Benchmarking  
ServiceNow partners ecosystem on competitive  
strengths and service portfolio

Customized report courtesy of:

**DXC** TECHNOLOGY

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Report Author: Ashwin Gaidhani

### **ServiceNow's scalability suits both small businesses and large enterprises in the AP&J region.**

ServiceNow is investing aggressively in AP&J, and we have observed a surge in adoption over the last 12 months, driven by digital transformation initiatives and a growing need for workflow modernization. Enterprises of all sizes, including startups, in the region are increasingly viewing ServiceNow as a strategic enabler for enhanced productivity, cost containment and superior CX. This trend has prompted global service integrators to expand their consulting and implementation offerings, tailoring solutions to address regulatory landscapes, varied cultural contexts and diverse market dynamics. Clients seek advisors that implement modules such as ITSM, HR Service Delivery (HRSD) and customer service management (CSM) and collaborate on long-term transformation strategies such as aligning platform road maps with business objectives.

### **ERP modernisation for comprehensive digital transformation goal:**

Enterprises in the AP&J region are adopting ERP systems as a key driver for digital transformation. They are modernizing their legacy systems using intelligent solutions from ServiceNow. Furthermore, Enterprises are increasingly investing in ServiceNow® Creator Workflows. ServiceNow's close association with leading ERP systems, such as SAP and Oracle, ensures that clients get maximum value from well-integrated, automated and user-friendly solutions.

Service providers have developed AI-driven ERP automation solutions that extend beyond IT, ensuring seamless data flow and process optimisation across departments. These solutions address unique industry challenges and workflows for long-term success. Industries such as manufacturing, retail, healthcare and financial services are increasingly adopting ERP solutions to optimise operations, boost productivity and maintain a competitive advantage.

A noticeable trend is the shift towards cloud-based ERP systems, which are preferred for

ServiceNow acts  
as a **catalyst for**  
**modernising**  
**workflows** across  
industries



## Executive Summary

their scalability, flexibility and cost-efficiency. Built on a scalable cloud platform, ServiceNow allows businesses to easily adapt to changing needs without extensive customisation. This flexibility ensures that the ERP system can grow and evolve alongside the business. These modern ERP systems enhance operational efficiency, improve UX and support data-driven decision-making, positioning businesses for long-term success.

### Opportunities for platform and vendor consolidation:

The AP&J region is experiencing a significant push towards IT vendor and platform consolidation to enhance business agility, allowing IT teams to focus on revenue growth. This consolidation simplifies IT architecture management, speeds up application deployment, lowers costs and improves data visibility. The diverse regulatory frameworks across countries in the AP&J region make it challenging for organisations to manage compliance with multiple vendors. Many enterprises face challenges with *solution sprawl*, where multiple AI solutions from different vendors lead to data fragmentation and inefficiencies. C-level leaders in AP&J

are more actively involved in AI initiatives compared to other regions, resulting in rapid operationalisation and increased ROI. Vendor consolidation helps streamline communication and coordination, reducing inefficiencies and improving decision-making processes. Service providers are increasingly advocating for ServiceNow as an intelligent and unified platform for consolidation as it helps organisations maximise ROI by simplifying IT architecture, enhancing operational efficiency, reducing costs and providing real-time insights. This unified approach enables businesses to focus on strategic growth and innovation. AP&J enterprises should adopt a policy of *buy rather than build* to reduce complexity and leverage prebuilt solutions available in the ServiceNow Store. This approach helps avoid the pitfalls of custom-built solutions and ensures better integration and support. A unified platform like ServiceNow enhances visibility into data and processes, enabling improved decision-making and operational efficiency. It also simplifies compliance management and enhances UX by providing a consistent interface.

### Investment in AI-driven customer service for

**enhanced CX:** Providing high-quality customer service is becoming increasingly challenging in the AP&J region. Despite some sectors experiencing rapid service improvements, overall CX ratings are declining. Key issues include significant hold times, frequent repeat calls and price-sensitive consumers impacted by cost-of-living pressures. While service quality is now a critical factor in determining perceived value, organisations struggle to integrate new technologies without adding complexity or costs. External pressures are reshaping customer expectations, preferences and spending behaviour, risking brand reputations. A lack of a unified view forces customers to reiterate their information, leading to frustration and inefficiency. There is a significant gap between agents' perception of resolution times and customers' actual experiences. In this context, AI plays a crucial role in enhancing human capabilities and enabling teams to work effectively. Predictive recommendations, case classification and AI agents reduce repetitive tasks, allowing employees to focus on high-value interactions. Virtual agents, self-service portals and real-time case tracking simplify

finding answers and deliver quick resolutions. Integrating AI into workflows unifies systems, provides real-time insights and delivers seamless CX, improving service efficiency and empowering agents. Some successful enterprises implementing ServiceNow CX suites are Lenovo, BT (British Telecom), Ndlovu Care Group, Western Sydney University and Vienna Insurance Group.

The expansion of global capability centres (GCCs) and global business services (GBS) centres in the AP&J region is significantly accelerating the adoption of ServiceNow for digital workflows. This trend is notably prevalent in the healthcare, ICT, financial services and manufacturing sectors across India, the Philippines and Malaysia, underscoring the critical role of end-to-end intelligent platforms in establishing key business processes.





## Provider Positioning

Page 1 of 3

	ServiceNow Consulting and Implementation Services	ServiceNow Managed Services	Innovation on ServiceNow
AC3	Leader	Leader	Not In
Accenture	Leader	Leader	Leader
Atos	Leader	Product Challenger	Product Challenger
Capgemini	Leader	Leader	Leader
Coforge	Product Challenger	Rising Star ★	Product Challenger
Cognizant	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader
DXC Technology	Leader	Leader	Leader
EPAM Systems	Not In	Contender	Not In
Epicon	Contender	Contender	Contender
EY	Market Challenger	Market Challenger	Market Challenger





## Provider Positioning

Page 2 of 3

	ServiceNow Consulting and Implementation Services	ServiceNow Managed Services	Innovation on ServiceNow
Fujitsu	Leader	Leader	Leader
Genpact	Product Challenger	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Leader
IBM	Market Challenger	Product Challenger	Product Challenger
Infobeans	Product Challenger	Not In	Not In
Infosys	Leader	Leader	Leader
Inmorphis	Rising Star ★	Product Challenger	Rising Star ★
InputZero	Product Challenger	Not In	Not In
KPMG	Market Challenger	Market Challenger	Market Challenger
Kyndryl	Product Challenger	Leader	Product Challenger
LTIMindtree	Product Challenger	Product Challenger	Product Challenger





## Provider Positioning

Page 3 of 3

	ServiceNow Consulting and Implementation Services	ServiceNow Managed Services	Innovation on ServiceNow
NTT DATA	Leader	Leader	Leader
Orange Business	Product Challenger	Product Challenger	Product Challenger
Randstad Digital	Contender	Product Challenger	Product Challenger
TCS	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger	Leader
Unisys	Contender	Contender	Market Challenger
ValueFlow	Contender	Contender	Contender
Veracity	Contender	Contender	Contender
Wipro	Leader	Leader	Leader



ServiceNow  
drives innovation,  
scalability and  
industry-specific  
solutions, offering  
a competitive edge  
in automation,  
AI and digital  
transformation.

Simplified Illustration Source: ISG 2025

**ServiceNow Consulting and  
Implementation Services**

**ServiceNow Managed Services**

**Innovation on ServiceNow**

### Definition

ServiceNow is a cornerstone of digital transformation, facilitating streamlined workflows across industries with its cloudbased platform. As a leader in enterprise operations, it adapts to market demands, making it a strategic partner for businesses pursuing digital overhaul and operational efficiencies. Advanced AI capabilities, including document intelligence and GenAI controllers, enhance automated and intelligent workflows.

The ServiceNow Xanadu release confirms AI's mainstream status, introducing new IT, employee and customer workflow features. It offers enhanced AI integrations, automation and industry-specific solutions, focusing on user experience, low-code development and advanced analytics to drive digital transformation, predictive maintenance and operational efficiency. Key inclusions are GenAI, predictive analytics and workflow automation tools.

Digital business transformation is now the core theme for ServiceNow partners, with the release of Now Assist, which adds digital

engineering competency to the platform. Built with and Built on are the new transformative opportunities, and businesses can directly consume these without any dependency on other ServiceNow modules. Industries are adopting App Engine and Integration Hub to drive industry-aligned process modernization.

ServiceNow's ecosystem encompasses three key stakeholders: enterprise clients, service providers and the platform, each integral to driving transformation. The collaboration among these entities, coupled with strategic partnerships and initiatives like the RiseUp program, cultivates a rich talent pool and supports regional growth strategies, significantly.





### Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following three quadrants: ServiceNow Consulting and Implementation Service, ServiceNow Managed Services and Innovation on ServiceNow.

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on AP&J market

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

### Provider Classifications

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

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

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

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





### Provider Classifications: Quadrant Key

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

**Contenders** offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a 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 Consulting and Implementation Services

### Who Should Read This Section

This report is valuable for service providers offering ServiceNow consulting and implementation services in AP&J 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 and examines how each addresses key regional challenges.

ISG also provides a comprehensive overview of the market's competitive landscape in AP&J.

### Strategy professionals

Should read this report to understand the trends in ServiceNow consulting and choose the right systems integration partner to develop a long-term technology road map for ServiceNow implementation.

### Technology professionals

Should read this report to learn about industry-specific solutions and providers' prowess in conducting consulting assignments for diverse industries.

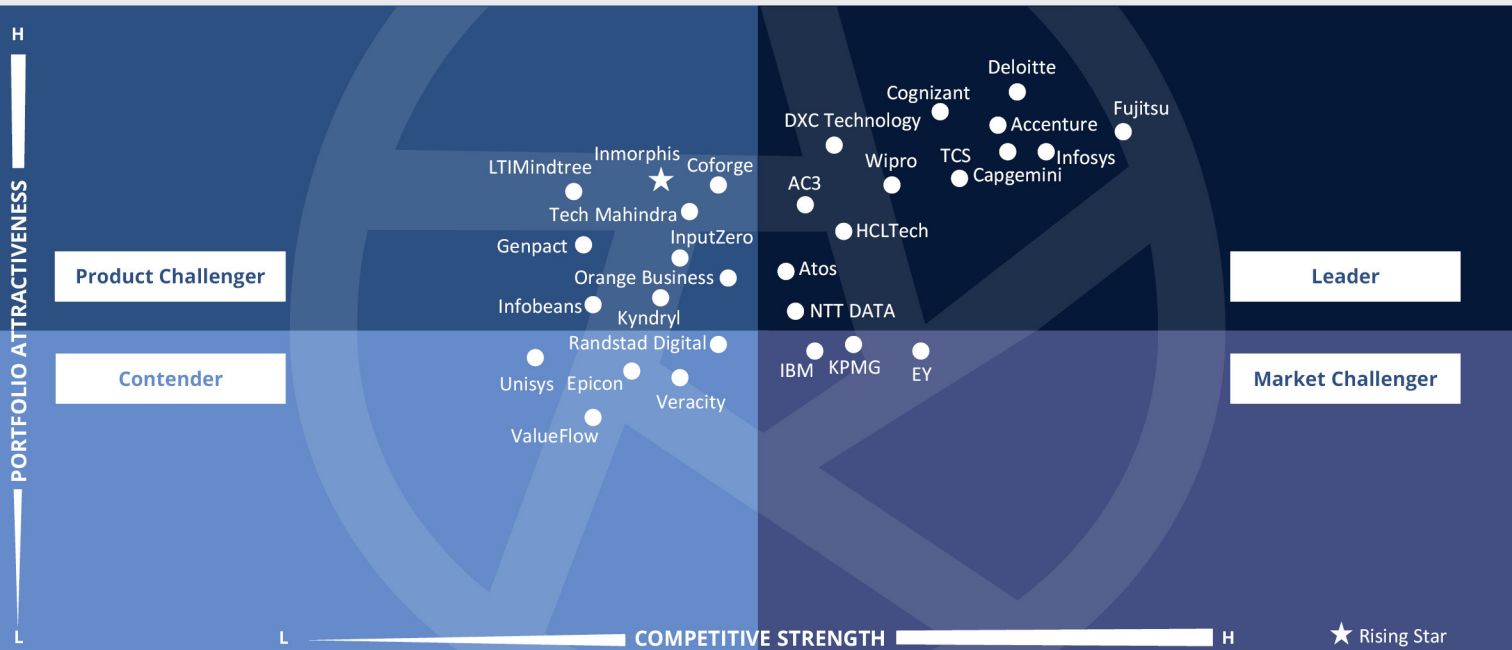
### IT and business professionals

Should read this report to understand the design framework, evaluation methodologies, and the maturity and complexity of processes associated with ServiceNow adoption in industries.

### Digital transformation professionals

Should read this report to know how service providers design ServiceNow solutions and map respective technologies.





This quadrant evaluates **providers' capabilities** to transform enterprise **workflows across all portfolios and configure** ServiceNow solutions. It emphasises implementing and integrating various **IT and non-IT modules** across an enterprise.

Ashwin Gaidhani

### Definition

ServiceNow consulting and implementation services help enterprises optimize workflow management across IT and non-IT functions, responding to changing economic pressures and enterprise needs. Consulting and implementation services help enterprises with adoption, development and ongoing operational support. Enterprises focus on maximizing returns from ServiceNow investments, prioritizing the implementation of strategic functionalities across HR, finance, legal, ESG and GRC workflows. ServiceNow serves as an integrated workflow platform that bridges internal and external stakeholders, meeting diverse requirements while simplifying organizations' internal complexity. Successful implementation requires expertise to ensure integration with other applications and systems, enabling intelligent workflows while minimizing data conversion. This approach includes deploying industry-specific and functional solutions using new ServiceNow capabilities, which act as differentiators for clients seeking.

### Eligibility Criteria

1. **Reference models, templates and frameworks:** best practices for opportunity identification, assessments for ServiceNow competencies, frameworks/ tools for ROI and business case development, and value benchmarks
2. **Workflow and service management experience:** client road maps to use ServiceNow as an integrated platform of platforms for operations, IT services, ESG and integration with GRC and security policies
3. **Certified ServiceNow professionals:** Certified System Administrator, Certified Implementation Specialist and Certified Application Developer
4. **Opportunity identification:** AI implementation and integration, including GenAI, transformers and LLMs, and use of tools/ methodologies
5. **Certifications:** ServiceNow certifications and workflow badges; expertise in ITIL 4, COBIT and DevOps; accredited ESM experience; ESG and GRC capabilities; integration experience; and industry- and region-specific regulatory knowledge
6. **Maintenance support:** installations, upgrades, new feature/module release management, migration, patch management, lifecycle management and maintenance after ServiceNow release migration
7. **System, data and process integration:** integration experience with the hub-and-spoke model at starter, standard, professional and enterprise levels
8. **Successful implementations:** completed projects validated through case studies/client testimonials



### Observations

**Accelerated adoption of intelligent automation:** Over the past year, many organisations in the AP&J region have moved beyond basic task automation, opting for intelligent process automation and ML within the ServiceNow platform with WDF (Workflow Data Fabric). Service providers are deploying end-to-end workflows that leverage predictive insights, enabling rapid incident resolution, proactive risk mitigation and on-demand resource allocation. This trend is particularly pronounced in the manufacturing, healthcare and finance industries, where compliance and traceability are critical.

**Growing focus on industry-specific customisations:** ServiceNow partners are developing accelerators and preconfigured solutions to address region-specific business processes, regulations and cultural nuances. Whether optimising government service delivery in Southeast Asia or enhancing supply chain operations in Japan, these tailored

frameworks streamline implementation timelines and boost ROI. By focusing on localised requirements, providers can effectively help enterprises navigate market complexities while maintaining global standards.

**Emphasis on strategic advisory:** AP&J clients have demonstrated a growing interest in holistic consulting engagements. Service providers are evolving from implementation specialists into trusted advisors, guiding customers through continuous improvement, platform governance and organisational change management (OCM). This shift underscores the importance of measurable outcomes, executive sponsorship and cross-functional alignment, ensuring that ServiceNow investments drive tangible, long-term business transformation across the region.

From the 31 companies assessed for this study, 30 qualified for this quadrant, with 13 being Leaders and one Rising Star.

### AC3

**AC3** is a ServiceNow Elite Partner, a significant achievement considering it is a regional and focused ANZ player. AC3 specialises in deploying ServiceNow in both AC3 domain-separated and client-specific instances. The firm ensures a smooth start to clients' ServiceNow journeys tailored to their organisations' needs.

### accenture

**Accenture** is one of ServiceNow's largest global go-to-market (GTM) partners. It won the 2024 Transformation Partner of the Year award in Japan and was named the finalist in the AP&J region. It uses ServiceNow as a core part of its architecture, helping transform both its operations and those of its clients.

### Atos

**Atos** Elite partnership status, extensive service offerings, industry-specific expertise, proven track record and innovative approach position it as a leading consulting and implementation player in the ServiceNow ecosystem in AP&J.

### Capgemini

**Capgemini** has developed proven assets and frameworks for secure and sustainable migration and implementation of the Now Platform®. Its *One Capgemini Experience* supports digital transformation efforts, helping organisations adapt to changing market conditions and technological advancements.



## ServiceNow Consulting and Implementation Services



**Cognizant** has made major strides with ServiceNow implementation in the AP&J region. Through its Agile DevOps delivery approach, it consistently evaluates its maturity and addresses any identified gaps to foster continuous improvement and maximise business value.



**Deloitte** strengthened its partnership with ServiceNow and secured the 2024 *Global Elite Partner of the Year* award for APAC. Deloitte's ServiceNow practice includes over 11,000 practitioners globally, with more than 16,700 ServiceNow certifications, ensuring high expertise and capability.



A ServiceNow Global Elite Partner, **DXC Technology** has been a leader in the ServiceNow ecosystem for more than 15 years. It has over 1,880 experts and delivered more than 7,200 global implementations. Its services span the entire ServiceNow ecosystem, including ITSM, IT operations management (ITOM) and CSM.



**Fujitsu**, the 2024 APAC Consulting and Implementation Partner of the Year, leads in ServiceNow implementations. It has the largest validated practice in the AP&J region for ITSM, ITOM, integrated risk management, CSM, HR and hybrid project management.



**HCLTech** offers extensive implementation and consulting services, covering platform configuration, workflow optimisation and system integration. The firm showcases its expertise and customer success stories through validated practices across various ServiceNow products, ensuring superior service delivery.



**Infosys** has established itself as a leader in ServiceNow consulting and implementation, leveraging over a decade of partnership with ServiceNow. Its Enterprise Service Management (ESM) Café is an AI-powered, plug-and-play solution designed to accelerate ServiceNow implementations by 40-50 percent.



**NTT DATA**, with a presence in over 50 countries, combines global and local expertise to deliver end-to-end ServiceNow solutions that are tailored to meet client needs. The solutions include ITSM, CSM, ITOM and IT business management (ITBM). Its team includes certified consultants and implementation specialists, ensuring successful project outcomes.



**TCS**, a ServiceNow Elite Partner for years, has a strong reputation in ServiceNow solutions, particularly ITSM. With its proprietary iSMART framework and clients' contextual knowledge, TCS can provide a value-centric road map to realise the business value of clients' investments.





## ServiceNow Consulting and Implementation Services



**Wipro**, a ServiceNow Elite Consulting & Implementation Partner, possesses capabilities to assess current processes, identify gaps and define a clear road map for client's digital transformation utilizing the Now Platform. It offers strategic planning and advisory services to assist clients in aligning their ServiceNow implementations with key business objectives.

### InMorphis

**InMorphis** (Rising Star) provides end-to-end ServiceNow services, including ITSM, ITOM, CSM, HRSD and security operations. Its holistic approach ensures seamless integration and interoperability across various business functions.



# DXC Technology



“DXC Technology has doubled its ServiceNow certifications and experts in the AP&J region with an outstanding CSAT of 4.83. It has made significant progress in acquiring new clients and boosting year-over-year revenue in the region.”

Ashwin Gaidhani

## Overview

DXC Technology is headquartered in Virginia, US. It has more than 127,200 employees across over 130 offices in 65 countries. In FY24, the company generated \$13.7 billion in revenue, with Global Infrastructure Services as its largest segment. DXC Technology modified its operational model, shifting from siloed functionalities to a more integrated consulting and engineering service approach. It is a preferred partner for ServiceNow professional services and leverages the *ServiceNow Impact Program* to deliver enhanced services and support to its customers.

## Strengths

### **Robust client base in the public sector in AP&J:**

DXC Technology has established a robust client base in the public sector across AP&J. While the company serves various industries, including BFSI, manufacturing, consumer goods and retail, its notable expertise lies in the public sector. An example is its collaboration with the Home Team Science and Technology Agency (HTX) in Singapore, where DXC Technology developed a state-of-the-art command centre for the Immigration & Checkpoints Authority (ICA) to enhance operational efficiency and security.

### **Increased presence in product advisory councils:**

DXC Technology has a strong, longstanding partnership with ServiceNow, which allows it to leverage the latest advancements and best practices in the

platform. The collaboration drives joint product development through the Product Advisory Council. DXC Technology has a significant position in its Financial Services, Generative AI, Asset Management and Risk and ESG Product Advisory Councils.

**Cross-platform expertise:** DXC Technology's involvement extends beyond specific platforms. For example, its SAP business group collaborates with ServiceNow to address SAP-related issues using ServiceNow's creator workflows. DXC's SAP CTO is part of the Product Advisory Council, providing expertise on how ServiceNow can better address these issues.

## Caution

DXC Technology has a strong foothold in AP&J and should invest in its ServiceNow expertise in designing an agentic AI pipeline on the Now Platform. As ServiceNow is set to become a de facto platform for industry-specific and functions-aligned agents, DXC can utilise its domain expertise to stand out in the region.





ServiceNow Managed Services

### Who Should Read This Section

This report is valuable for service providers offering ServiceNow managed services in AP&J 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 and examines how each addresses key regional challenges. ISG also provides a comprehensive overview of the market's competitive landscape in AP&J.

#### Strategy professionals

Should read this report to understand service providers' capabilities in managing and supporting the maintenance of ServiceNow solutions across portfolios.

#### Service delivery professionals

Should read this report to understand how ServiceNow managed service providers maintain their credibility and service quality.

### Service line and functional professionals

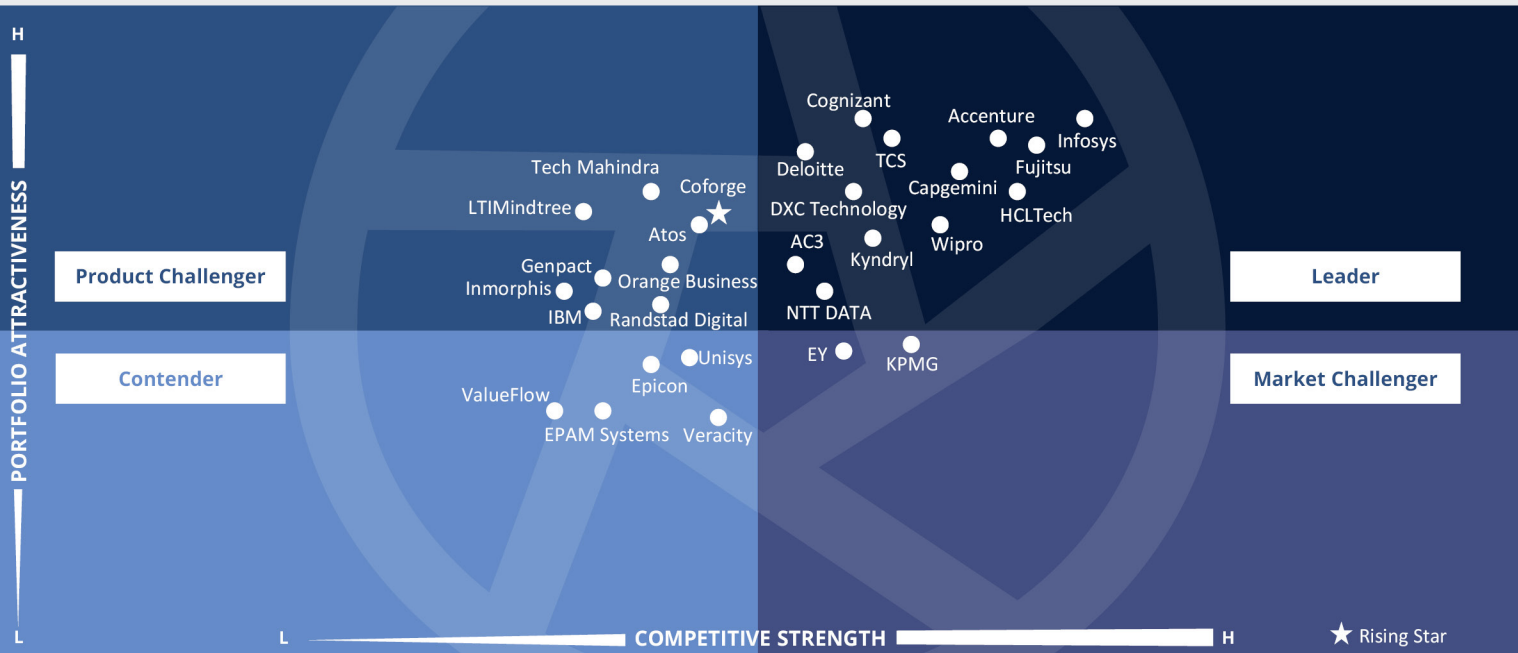
Should read this report to justify the fitment of ServiceNow resources and workflows across services.



**ISG Provider Lens™**  
**ServiceNow Ecosystem Partners**  
**ServiceNow Managed Services**

Source: ISG RESEARCH

AP&J 2025



This quadrant assesses **providers' capabilities** to manage ServiceNow platform operations and performance, covering **CloudOps, FinOps and RiskOps**, for enterprises increasingly looking for **seamless experience management**.

Ashwin Gaidhani



## ServiceNow Managed Services

### Definition

This quadrant assesses ServiceNow partners offering lifecycle support for maintenance, including monitoring; remote support; and centralized management of the Now platform®, workflows and applications. With the growing popularity of DevOps, managed service providers must comply with new requirements. They must be prepared for the platform's continuous evolution, which can challenge the existing solutions' status quo, and to quickly manage two new releases. Effective management involves balancing platform costs and licensing against the strategic value and ROI, focusing on CloudOps, FinOps and RiskOps to manage the platform's lifecycle and functionalities. Key provider evaluation parameters are maintenance effectiveness, data quality management, security, compliance, deployment options, addressing data privacy concerns and the provision of flexible pricing.

With the complexity of workflows, providers must deliver services globally and across domains. They must manage a sophisticated and integrated application landscape and operate within or integrate with a multivendor environment, emphasizing customization and modernization.

### Eligibility Criteria

- 1. Experience with support:** experience with the Now platform®, workflows, thirdparty applications, integrators and accelerators, new features/modules and upgrades
- 2. Delivery capabilities:** delivery with proximity to clients
- 3. Technology partnerships:** partnerships with key software providers and a comprehensive AMS portfolio
- 4. Service integration and management (SIAM) and delivery models:** expertise in managing ServiceNow in broader CloudOps Go to Template Contents applications, including AIOps, MLOps, FinOps, RiskOps and ITOps
- 5. Delivery and contract models maturity:** ability to manage multiple vendors and dependencies between toolchains while adhering to SLAs
- 6. Broad customer base:** local use cases and references
- 7. Intelligent, adaptive and progressive maintenance:** alignment with upgrades and functionality enhancements from ServiceNow and technology ecosystems, service integrators, and in-house engineering teams (external partners and specialized tool providers)
- 8. Ability to manage decentralized deployment within an organization:** low-code/no-code and citizen developer techniques; training for identification and delivery; and user knowledge updates on new releases, versions, features and modules



### Observations

**Expansion of proactive operations and monitoring:** Leading service providers are utilizing AI-driven monitoring and automated incident resolution to eliminate disruptions. This proactive approach involves implementing real-time dashboards, predictive analytics and RPA within ServiceNow, enabling enterprises to detect anomalies and address root causes immediately. These capabilities have substantially reduced downtime and improved service-level compliance across diverse industries, including telecommunications, retail and government entities.

**Emphasis on outcome-based contracts:** Many AP&J clients are shifting from traditional time-and-materials or fixed-cost contracts to outcome-based models that align with business metrics. Service providers responding to this demand are introducing structured governance frameworks, value measurement approaches and performance-tracking dashboards that tie service fees directly to tangible results.

By quantifying cost savings, productivity gains and user satisfaction improvements, these outcome-focused engagements build trust and foster long-term partnerships.

**Focus on localised support and compliance:** Adherence to data protection regulations, privacy guidelines and industry mandates has become paramount in AP&J. ServiceNow partners are ramping up local data centres, multilingual support and in-region talent to meet stringent compliance obligations effectively. This localised approach strengthens customer confidence and accelerates issue resolution and deployment timelines, helping enterprises take full advantage of ServiceNow's managed services in a region characterised by rapid growth and regulatory complexity.

From the 31 companies assessed for this study, 29 qualified for this quadrant, with 13 being Leaders and one Rising Star.

### AC3

**AC3** provides specialised, highly secure ServiceNow solutions with a strong emphasis on UX and collaborative tools, particularly within the public sector, health and financial services industries.

### accenture

**Accenture** offers a comprehensive range of managed services for complex business processes. It focuses on delivering customer success at scale through managed services and as-a-service models. Accenture provides tailored solutions to meet the unique needs of businesses in the AP&J region.

### Capgemini

With its digital service integration and management (SIAM) approach, **Capgemini** offers customised solutions to accelerate client transformations and deliver value quickly for its ServiceNow module. To support this, Capgemini has established multiple digital SIAM-specific CoEs worldwide.

### cognizant

**Cognizant** offers a comprehensive range of managed services underpinned by its IP, frameworks and comanagement approach, which helps organisations optimise their digital workflows and enhance productivity.



## ServiceNow Managed Services

### Deloitte.

**Deloitte** has significantly reimaged cost-effective service delivery with the introduction of Breakthrough.ESM in 2024. This new managed services solution integrates ServiceNow's capabilities with Deloitte's design expertise and extensive industry and domain knowledge.

### DXC TECHNOLOGY

**DXC Technology's** managed services focus on maintaining service health, optimizing cloud delivery and ensuring operational resilience. It leverages intelligent automation, AI and ML to maximise IT investments and improve service delivery.

### Fujitsu

**Fujitsu**, in collaboration with its clients, created an extensive managed service offering known as Customer Advisory and Support Excellence (CASE), which complements ServiceNow's Impact Services to provide optimised ROI.

### HCLTech

**HCLTech**, as an Elite ServiceNow Partner, has demonstrated significant progress in the past 12-18 months with new clients onboard through plug-and-play service delivery and solution or program enhancements. A high CSAT score of 4.69 reflects its customer-centricity and platform focus.

### Infosys

**Infosys** was recognised as the 2024 AP&J Service Provider Partner of the Year. In 2024, Infosys strengthened its collaboration with ServiceNow to provide end-to-end managed services by leveraging the AI capabilities of the Now Platform® and the Infosys Enterprise Service Management Café solution.

### Kyndryl

**Kyndryl** provides a wide range of managed services and solutions on the Now Platform, including ITSM, ITOM and ITAM. It has successfully implemented IT solutions for various clients in the AP&J region, including a major telecommunications provider that upgraded its ITSM platform to a cloud-based solution, resulting in significant cost savings and improved service delivery.

### NTT DATA

**NTT DATA** provides full lifecycle support for ServiceNow, from initial implementation to ongoing management and optimisation, and ensures the client's ServiceNow environment remains efficient and up to date. It focuses on continuous improvement by leveraging the latest features and capabilities of the Now Platform.

### TCS TATA CONSULTANCY SERVICES

**TCS** delivers as-a-service and managed services, from license procurement to platform support, including ITSM, ITOM and IT business management (ITBM) services. The firm is investing in certifying its resources on the Now Platform, indicating a robust pipeline of ServiceNow deals.





## ServiceNow Managed Services



**Wipro** offers a comprehensive suite of ServiceNow managed services in areas such as ITSM, ITOM, GRC and ITAM, designed to enhance digital transformation and operational efficiency for clients.



**Coforge** (Rising Star) has extensive expertise in managing multivendor environments, including SIAM models. Whether SIAM is client-led, independent or hybrid, Coforge seamlessly collaborates with SIAM providers to ensure the success of the engagement.





"DXC Technology is recognised for its capabilities in hosting applications and providing managed services at scale, supported by its global delivery centres, Platform X and partnerships with major technology providers."

Ashwin Gaidhani

# DXC Technology

## Overview

DXC Technology is headquartered in Virginia, US. It has more than 127,200 employees across over 130 offices in 65 countries. In FY24, the company generated \$13.7 billion in revenue, with Global Infrastructure Services as its largest segment. DXC's unique strategy involves close collaboration with client business process owners to develop ServiceNow-based solutions that deliver specific business outcomes and a strong ROI. DXC Technology boasts over 1,880 ServiceNow-certified professionals and has managed over 350 instances globally.

## Strengths

**Strong local presence:** DXC Technology has appointed several practice leaders to enhance market penetration in Southeast Asia, India and the Middle East. This strategy ensures a dedicated focus on understanding and addressing local market needs, leading to more tailored and effective strategies. In the past 12-18 months, the company has scaled its regional hubs to accelerate its solution and delivery capabilities (CoE).

**Global scale and regional execution:** DXC Technology operates six Global Network Operations Centres and regional delivery centres, supporting over 600 customers across various industries. These centres ensure round-the-clock monitoring and management of client environments, providing robust support and rapid issue

resolution. Its global delivery model combines economies of scale and local expertise. Strategic partnerships with major technology providers such as Dynatrace, SAP and Oracle enhance its service offerings and provide value to customers.

**Intelligent automation for service delivery:** By deploying ServiceNow's Now Assist on its service delivery platform, DXC Technology has improved the incident management process, saving nearly 10,000 hours monthly and increasing efficiency. DXC Technology's Platform X is an AIOps-enabled delivery platform that supports hybrid cloud infrastructures with self-diagnosing and self-healing capabilities.

## Caution

DXC delivers tangible business value to its clients by industrializing its delivery capabilities globally and expanding its portfolio with new industry-specific ServiceNow solutions. The firm can further strengthen its position in AP&J by leveraging its certified resources globally.





Innovation on ServiceNow

### Who Should Read This Section

This report is valuable for service providers offering innovation on ServiceNow in AP&J 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. The report also discusses how each provider addresses regional market challenges. It gives a comprehensive overview of the market's competitive landscape and assesses providers that showcase innovation capabilities using the NowAssist platform.

#### Chief strategy and innovation leaders

Should read this report to understand how ServiceNow facilitates enterprise digital transformation and helps them develop a road map to improve competitiveness.

#### Business line managers

Can read this report to learn about the ServiceNow platform's capabilities in servicing IT and non-IT segments and develop efficient industry-specific solutions.

### Engineering teams

Can read this report to gain insights into software solution development and thus build IPs/ accelerators for cloud platforms/industries by analyzing the best fit ServiceNow solution.

### Technology and application development professionals

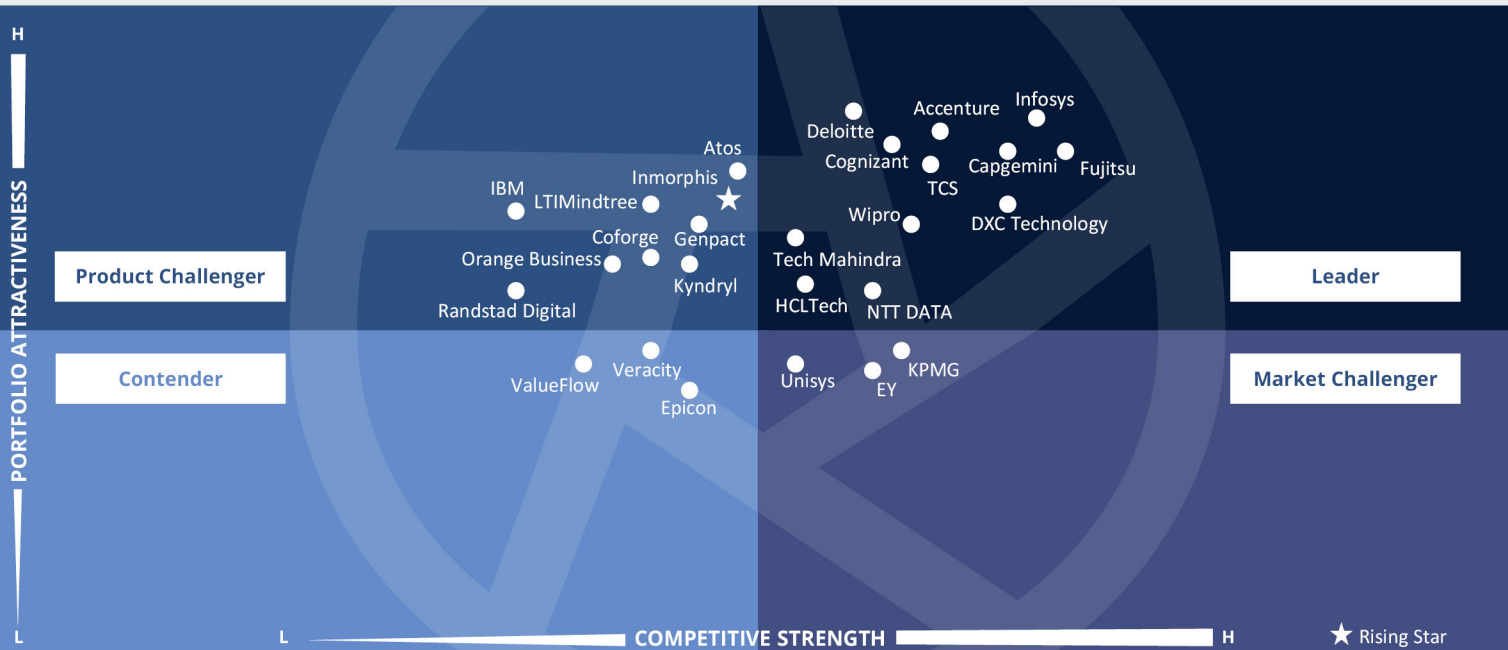
Should read this report to learn about the latest ServiceNow features, functionalities and components, as well as their configuration and integration.



**ISG** Provider Lens™  
ServiceNow Ecosystem Partners  
Innovation on ServiceNow

Source: ISG RESEARCH

AP&J 2025



This quadrant evaluates providers' **commitment to innovation** and digital transformation through the development of novel **solutions and applications on the Now Platform®**.

Ashwin Gaidhani



### Definition

This quadrant evaluates ServiceNow partners creating and delivering comprehensive offerings to promote innovation and digital transformation. The Now platform® acts as the base for these offerings, generating solutions that improve workflows and support automation aligned with specific industries and business functions. It facilitates both Build with Now (allowing for the development of new solutions) and Build on Now (utilizing existing capabilities for customization). The platform's core is Now Assist GenAI, which integrates AI-driven services like AIOps (predictive ML services) and enterprise service knowledge automation to streamline operational efficiency and predictive analytics. The platform also includes industry- and function-specific solutions. App Engine, Automation Engine and Integration Hub offer scalable tools for application development, process automation, and seamless integration, enhancing ServiceNow's ability to create dynamic, efficient enterprise environments.

### Eligibility Criteria

1. **Low-code/no-code development expertise:** proficiency in using ServiceNow's low-code/no-code development tools
2. **Track record of innovation:** case studies and references for innovative solutions built on and built with ServiceNow
3. **AI-driven solutions:** integration of AI and ML services on ServiceNow, using predictive ML models and AI-powered analytics
4. **Expertise in AIOps:** predictive analytics, anomaly detection, and automation of ITOps, using AIOps within ServiceNow
5. **Industry specialization:** expertise in the industry served, such as finance, healthcare, ITSM and HR
6. **App Engine development experience:** a portfolio of custom applications using App Engine
7. **API and integration expertise:** integration of third-party applications and services using ServiceNow's APIs, ensuring seamless data flow and process integration
8. **Automation implementation:** deployment of automated workflows using Automation Engine
9. **Seamless integration:** use of Integration Hub to connect different enterprise systems, ensuring smooth data exchange and process continuity
10. **Experience in multisystem integration:** successful integrations across various enterprise platforms (ERP, CRM and HRM) and IT systems



### Observations

**Expansion of verticalised services:** Over the last year, ServiceNow partners have rolled out specialised accelerators targeting industries such as telecommunications, pharmaceuticals and the public sector. By leveraging the Now Platform's® low-code capabilities, integrators quickly adapt workflows to meet local regulations, while offering enhanced security and data handling. This approach shortens implementation timelines and highlights the significance of scalable, localised solutions across AP&J.

**AI-infused workflow enhancements:** Providers are increasingly embedding AI and ML into new builds, enabling predictive analytics, proactive risk mitigation and personalised user interactions. These capabilities streamline operations by automating service management, anticipating incidents and delivering context-rich dashboards. As a result, AP&J organisations are achieving tangible efficiency gains and driving rapid decision-making across various departments.

### Cocreation and continuous improvement:

Global service integrators have adopted collaborative development models, working closely with clients and ecosystem partners to tailor ServiceNow's functionalities. By combining open integration frameworks, domain expertise and iterative feedback loops, these cocreation efforts yield adaptable, future-ready workflows. Clients benefit from continuous improvement cycles, reduced operational overhead and enhanced alignment with emerging compliance mandates, solidifying ServiceNow's role as a strategic catalyst in AP&J's business transformation journey.

From the 31 companies assessed for this study, 27 qualified for this quadrant, with 12 being Leaders and one Rising Star.



**Accenture** has created accelerators on the Now Platform® and expanded the AI Lighthouse program to help customers across various industries design, develop and implement new GenAI use cases. It builds custom solutions and integrations available on the ServiceNow Store, tailored to meet the needs of different industries and business functions.



**Capgemini** incorporates GenAI capabilities into its ServiceNow solutions to boost productivity and efficiency across multiple business functions. This process involves utilizing AI for tasks such as summarizing incidents, generating code and enhancing self-service workflows.



**Cognizant** leverages ServiceNow's capabilities, which include RaptorDB, Workflow Data Fabric and GenAI, to create an *enterprise library of work*, emphasizing efficiency and abstraction from individual applications.



**Deloitte** secured the 2024 ServiceNow APAC Employee Workflow Partner of the Year award. Driven by Deloitte's ServiceNow Assets & Solutions Group (ASG), it provides industry-focused solutions and offerings built on top-tier IP, leveraging the latest innovative capabilities and incorporating GenAI.



## Innovation on ServiceNow

### **DXC TECHNOLOGY**

**DXC Technology** and ServiceNow have established a joint CoE to drive coinnovation and the adoption of GenAI solutions. DXC AI consultants guide clients through their AI journey, ensuring adherence to data privacy, governance and compliance standards.

### **FUJITSU**

**Fujitsu's** growing ServiceNow ecosystem and dedication to innovation and industry-specific solutions are evidenced by several awards in the APAC. In 2024, Fujitsu was recognised as the ServiceNow Partner of the Year for Creator Workflow, Customer Workflow and Technology Workflow.

### **HCLTech**

**HCLTech** and ServiceNow have launched GenAI-powered labs to showcase innovative solutions. These labs feature tailored innovations and ready-to-deploy use cases across various industries, including HR and finance.

### **Infosys**

**Infosys**, as an Advanced Platform Partner, brings extensive innovation experience to the Now Platform, with eight offerings developed in collaboration with ServiceNow. In addition to the ESM Café, Infosys is establishing a Pro Plus BOT factory, providing over 100,000 Now Assist-powered chatbots to help customers maximise the value of their AI journey.

### **NTT DATA**

**NTT DATA** utilises the ServiceNow *Built With* platform to integrate and unify ESG processes through its *Enterprise DX Platform for ESG*. Its Enterprise Experience Platform aids enterprises in enhancing UX, optimizing costs and mitigating risks associated with ERP system upgrades.

### **TCS**

**TCS** utilises the capabilities of the ServiceNow Now Assist platform to enhance productivity and efficiency gains across various domains, including ITSM, customer case management and HR. GenAI use helps streamline workflows, improve UX and provide intelligent automation solutions.

### **Tech Mahindra**

**Tech Mahindra** has launched innovative service offerings for clients, showcasing strong capabilities in developing solutions on the Now Platform. It integrates GenAI through its *Build on Now* and *Build with Now* initiatives.

### **Wipro**

**Wipro** acts as a consultative partner, guiding clients through the GenAI landscape. It focuses on integrating AI into existing workflows to optimise operations and enhance overall client experience and outcomes. Wipro utilises domain-specific models within Now Assist to tailor solutions for different business needs.





## Innovation on ServiceNow

### inMorphis

**inMorphis** (Rising Star), through its proprietary GenAI Accelerator, accelerates client adoption by identifying gaps and aligning solutions with their organisational LLM strategies. Its partnership with Confluent facilitates the integration of big data streams with Now Assist, unlocking predictive insights and automation opportunities.





"DXC Technology and ServiceNow focus on expanding their global reach, particularly in highly regulated regions, and delivering AI innovations that increase efficiency."

Ashwin Gaidhani

# DXC Technology

## Overview

DXC Technology is headquartered in Virginia, US. It has more than 127,200 employees across over 130 offices in 65 countries. In FY24, the company generated \$13.7 billion in revenue, with Global Infrastructure Services as its largest segment. DXC Technology's dedicated business group of ServiceNow experts drives tangible business impact through the Now Platform®, enhancing customer loyalty and EX. DXC Technology integrates advanced analytics and enhanced AI capabilities from ServiceNow's ITSM Pro and process mining solutions into its Platform X. This integration aims to foster innovation by generating proactive insights that boost productivity and operational efficiencies.

## Strengths

**Joint GenAI CoE:** DXC Technology and ServiceNow established the Generative AI Center of Excellence (CoE). This initiative combined DXC Technology's industry and AI expertise with ServiceNow's GenAI solutions to accelerate AI adoption for customers. The CoE leveraged DXC Technology's AI Impact services, encompassing consulting, engineering and secure enterprise solutions, and integrated them with ServiceNow's GenAI tool, Now Assist.

**AI integration in Platform X:** DXC Technology and ServiceNow expanded their strategic partnership by integrating ServiceNow's advanced analytics and enhanced AI capabilities into DXC's Platform X. This integration aimed to drive innovation for customers by utilizing ServiceNow's IT

Service Management Pro and process mining solutions. As a result, DXC Technology's Platform X enhanced its ability to generate proactive insights, boosting productivity and operational efficiency for more than 500 customers.

**Internal benchmarking:** The collaboration between DXC and ServiceNow aims to guide clients in modernizing their operations with AI, thereby enhancing efficiency and CX. DXC Technology implemented Now Assist within its service delivery platform, transforming incident management processes for over 500 clients and saving approximately 10,000 hours monthly.

## Caution

DXC invested heavily in talent development throughout 2024. The company boasts over 2,000 ServiceNow certifications and more than 1,300 accreditations globally. However, these achievements need to be integrated into a GTM strategy for employer branding in the AP&J region.





# Appendix

The ISG Provider Lens 2025 – ServiceNow Ecosystem Partners research study analyzes the relevant software vendors/service providers in the AP&J 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 study will include data 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. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

The study was divided into 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 & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
  - \* Strategy & vision
  - \* Tech Innovation
  - \* Brand awareness and presence in the market
  - \* Sales and partner landscape
  - \* Breadth and depth of portfolio of services offered
  - \* CX and Recommendation



## Author & Editor Biographies

### 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.

### Research Analyst



**Megha Dodke**  
**Research Specialist**

Megha Dodke, joined as a Research Specialist in October 2024. Megha is from Bangalore, India, and holds a Master's degree in Retail Management & Marketing as well as Product Strategy certification from IIM-K. Megha possess over 11 years of professional experience in Business Research, Market Intelligence, Competitive Intelligence, Sales enablement and Strategy across industry verticals. She has extensive experience in leading the development of competitive marketing and sales content, focusing on identifying and articulating key winning attributes.

Specializing in enterprise services and enterprise platforms (ServiceNow, Workday), she has successfully collaborated with global clients and stakeholders to deliver actionable research.



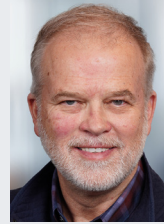


*Study Sponsor*

**Aman Munglani**  
**Director Ecosystem Studies,**  
**Custom Research & Digital innovative series**

A recognized thought leader and industry advisor with over 23 years of experience in emerging technologies, Emerging vendors and infrastructure, Aman Munglani has spent much of his professional life advising the C-suite of Global 2000 companies on digital strategies, start-up engagement, innovation, technology roadmaps and vendor management. Prior to ISG, Aman spent twelve plus years at Gartner guiding CIOs and IT managers across Asia Pacific and Europe on emerging technologies, their use cases and maturity, infrastructure trends and technologies, vendor comparisons, and RFP reviews.

He also advised many global and Asia-Pacific vendor organizations on their go to market, product and pricing strategies and applicable competitive scenarios.



*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 partner 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, while 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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### iSG

ISG (Nasdaq: III) is a 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.

For more information, visit [isg-one.com](https://isg-one.com).





**APRIL, 2025**

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**REPORT: SERVICENOW ECOSYSTEM PARTNERS**