

ServiceNow Ecosystem Partners

An analysis of ServiceNow ecosystem,
including providers' portfolio attractiveness
and competitive strengths

Customized report courtesy of:



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ServiceNow: Redefining digital workflows

ServiceNow is a pivotal platform for digital workflow transformation across various industries and business capabilities. It is a leading cloud-based platform that enables digital workflows for enterprise operations. It is widely adopted and holds significant growth potential in the European market. ServiceNow is also an innovation and development platform, adapting and evolving with the market needs and trends. It acts as a strategic partner for enterprises seeking to drive their digital transformation and business goals. The transformative technologies embedded in ServiceNow shape the future of enterprise operations and enhance the last-mile experience. In 2023, ServiceNow unveiled the highly anticipated Vancouver release, with several new features and capabilities that revolutionize digital workflows and enhance user experiences.

This release introduced advancements across various modules, including IT service management (ITSM), HR and customer service management (CSM). Notable features include enhanced AI capabilities for intelligent automation, improved analytics for data-driven insights and expanded mobile capabilities for seamless accessibility. The new and enhanced modules include functionalities such as Document Intelligence, Generative AI Controllers, Natural Language Understanding, Now Assist releases, Predictive Intelligence modules, Process Mining and Task Intelligence Admin Console and User Experience Analytics.

The ServiceNow Ecosystem study focuses on three critical entities, namely, enterprise clients, service providers and the ServiceNow platform, each with significant potential and propensity to accelerate business transformation. European enterprises are rapidly adopting ServiceNow to streamline operations, enhance CX and differentiate themselves by developing focused and aligned solutions. The platform's robust application suite in ITSM, IT operations management (ITOM) and IT business

ServiceNow is the
**new workflow
engineering
platform**, and service
providers are
the **new innovation
partners**.



management (ITBM) has become indispensable for organizations striving to improve efficiency and agility. ITSM has always been the first goal for ServiceNow adoption and is deeply rooted in enterprises that manage information communication technology (ICT) infrastructure. Enterprises prioritize compliance with regulatory and security mandates, particularly GDPR, in Europe's stringent regulatory environment. ServiceNow's platform offers comprehensive tools to manage and automate governance, risk and compliance (GRC) processes, enabling enterprises to meet legal standards and protect sensitive data effectively. The increase in partnerships between global systems integrators (GSI) and ServiceNow is enabling the development of verticalized solutions that meet the needs of enterprise clients and help them upgrade their business process offerings by leveraging existing domain knowledge to address ongoing challenges.

Internationalization driving the European ServiceNow market

As an expansion strategy, European enterprises expand their service coverage beyond local regions with existing clients.

Large service providers are building leadership based out of Europe to focus on regional growth. These actions are part of an extensive GSI internalization strategy to mark their presence in large European markets. Large service providers partner with local counterparts and support enterprise clients in their regions. This partner ecosystem drives the European market, spanning diverse regions, languages and regulatory nuances. Talent shortage is another major factor driving the expansion strategy in areas with technical resource density. ServiceNow invests in various initiatives, such as the Rise Up program, to build diverse, certified, platform-ready talent pools.

Enterprise clients are building a robust strategy to advance on the digital maturity scale by adopting cloud-native platforms for business, corporate and technology workflows. However, the onboarding of multiple platforms increases the complexity. Most workflows and domain-centric platforms are expanding into adjacent areas, which commonly duplicate workflow modules, creating ambiguity among enterprises in choosing the right platform. Workday and ServiceNow products are perfect

examples of human resources management systems and HCM modules partly overlapping but being part of independent platforms. Hence, the license cost needs rational justification for onboarding. The enterprise product management portfolio encompasses ERP systems, CRM platforms and workflow management tools to work cohesively to facilitate seamless information transfer, adding to the enterprise intelligence.

ServiceNow: Leading sustainable transformation in European enterprises through ESG and GRC integration

ServiceNow has adeptly positioned itself to address the intricate requirements of European enterprise clients, particularly in the domains of environmental, social and governance (ESG) and GRC. The company acknowledges the escalating significance of sustainability and ethical governance within Europe and has tailored its solutions to assist organizations in managing ESG and GRC comprehensively. Through ServiceNow's platform, companies can embed ESG criteria into their fundamental business strategies, thereby enhancing transparency, accountability and sustainability.

This strategic integration is paramount for businesses striving to adhere to the rigorous regulatory frameworks and reporting mandates prescribed by the EU. These regulations necessitate detailed consideration of environmental impact, social responsibility and stringent governance practices. ServiceNow's GRC solution enables companies to streamline risk and compliance management cohesively, automate workflows, and gain instant visibility into compliance procedures. By harnessing advanced analytics and AI, enterprises can proactively detect and mitigate risks, ensuring compliance with the intricate regulatory landscape governing European enterprises. ServiceNow's commitment to sustainable and ethical business practices highlights its dedication to aiding clients in navigating the changing regulatory environment, building trust and promoting long-term value creation.

ServiceNow advancements and developments in the past 12 months

This year, the ServiceNow Build on Now and Build with Now initiatives focus on technology advancements in the banking sector. The new offering portfolio features generative AI (GenAI)



Executive Summary

applications to support AI and ML use cases and applications. The Global Elite and Elite Service Provider partners of ServiceNow in the European market have designed highly scalable and customizable enterprise-grade process and workflow automation solutions. These solutions can be tailored to meet organizations' unique needs, such as processing millions of transactional workflows daily or executing advanced customizations. Service providers also focus on developing teams that can scale to meet unique and industry-specific client needs.

The latest release of ServiceNow's Now Assist platform, expanded in Vancouver, marks a significant advancement in service management solutions. With its innovative features and streamlined user interface, Now Assist revolutionizes how organizations handle their service operations. This release also introduces cutting-edge capabilities such as AI-powered virtual agents, advanced analytics and enhanced automation, empowering businesses to deliver exceptional service experiences while optimizing efficiency and cost-effectiveness.

The Now Assist platform's integration with ServiceNow's broader ecosystem further enhances its value proposition, enabling seamless collaboration across departments and workflows. Its intuitive design and robust functionality make it a game-changer for businesses looking to elevate their service delivery capabilities. As ServiceNow expands its presence in Europe, clients are poised to benefit significantly from adopting Now Assist, leveraging its capabilities to drive innovation, improve customer satisfaction and achieve operational excellence. With its potential to streamline processes, reduce response times and enhance overall service quality, Now Assist is a compelling solution for European-based ServiceNow clients seeking to stay ahead in today's competitive landscape. As organizations increasingly prioritize digital transformation and customer-centricity, Now Assist will serve as a strategic tool to drive success and competitive advantage. Some forward-looking partners in the European market are already working with ServiceNow to build a talent pipeline equipped to drive the GenAI application initiatives on Now Assist.

This partnership will enable them to consult and implement industry- and function-specific enhanced modules engineered on top of Now Assist.

ServiceNow's Document Intelligence solution and Document Understanding module are critical to all business workflows and automation solution stacks built on top of ServiceNow. Document Intelligence employs advanced ML algorithms to extract vital information from unstructured documents, such as invoices, contracts and legal documents. By automatically identifying and extracting relevant data points, the Document Understanding module streamlines document processing workflows, reducing the need for manual intervention and minimizing the risk of errors. This screening allows organizations to accelerate document-processing times, improve data accuracy and ensure compliance with regulatory requirements. The solution also includes a Document Classification module, which uses AI-powered classification algorithms to categorize documents automatically based on their content and context. By analyzing the text and structure

of documents, the module can accurately order and sort them, saving time and reducing the risk of errors. Enterprise clients will focus on enhancing and institutionalizing business capabilities to improve business outcomes.

ServiceNow reshapes Europe's business landscape, driving digital innovation and operational excellence across all enterprise portfolios.





Provider Positioning

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	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
Accenture	Leader	Leader	Leader
agineo	Leader	Leader	Product Challenger
Aspire Systems	Contender	Contender	Not In
Bechtel	Market Challenger	Contender	Contender
Capgemini	Leader	Leader	Leader
CGI	Product Challenger	Contender	Product Challenger
Coforge	Not In	Product Challenger	Not In
Cognizant	Leader	Leader	Leader
Computacenter	Market Challenger	Market Challenger	Market Challenger
Deloitte	Leader	Leader	Product Challenger





Provider Positioning

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	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
Devoteam	Contender	Market Challenger	Contender
DXC Technology	Product Challenger	Product Challenger	Product Challenger
Eviden (an Atos Business)	Leader	Leader	Leader
EY	Contender	Product Challenger	Market Challenger
Fujitsu	Market Challenger	Leader	Leader
Genpact	Not In	Product Challenger	Product Challenger
HCLTech	Product Challenger	Leader	Product Challenger
Hexaware	Rising Star ★	Product Challenger	Leader
IBM	Product Challenger	Product Challenger	Product Challenger
Infosys	Leader	Leader	Leader





Provider Positioning

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	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
iTSM Group	Product Challenger	Not In	Contender
KPMG	Leader	Market Challenger	Market Challenger
Kyndryl	Product Challenger	Leader	Leader
LTIMindtree	Leader	Product Challenger	Leader
NTT DATA	Product Challenger	Product Challenger	Leader
Plat4mation	Leader	Leader	Product Challenger
Sopra Steria	Contender	Not In	Not In
TCS	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger
The Cloud People	Contender	Not In	Product Challenger





Provider Positioning

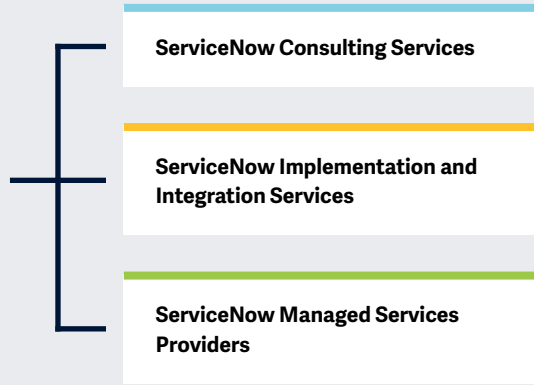
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	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
Tietoevry	Product Challenger	Rising Star ★	Rising Star ★
T-Systems/OS	Leader	Leader	Leader
Unisys	Not In	Contender	Not In
Wipro	Leader	Leader	Leader
Wrangu	Not In	Product Challenger	Rising Star ★
WSP-Consulting	Market Challenger	Market Challenger	Not In



Key focus areas for ServiceNow Ecosystem Partners.

Simplified Illustration; Source: ISG 2024



Definition

ServiceNow continues to experience substantial growth, recording revenue of \$2,150 million in the second quarter of 2023, a 23 percent YoY increase. This growth demonstrates ServiceNow's ability to meet customer requirements.

ServiceNow adoption and workflow engineering trajectory indicate a future where enterprise clients consistently optimize efficiency by embedding technology components. Service providers are pivotal in crafting these tailored, intelligent workflow solutions that propel businesses forward in the competitive digital economy. Service providers are responding positively to these shifts by adopting ServiceNow capabilities to develop bespoke solutions catering to the needs of vertical industries. A growing trend toward industry-specific workflows is evident through strategic acquisitions and partnerships to enhance domain expertise. Growing demand from enterprise clients is driving service providers to explore GenAI and ML capabilities, adding predictive and prescriptive analytics into workflows to facilitate smarter and more proactive operations.

ServiceNow's NOW platform introduces GenAI features, such as Case Summarization and Text-to-Code, integrated into all workflow offerings. These capabilities leverage ServiceNow's proprietary large language models (LLMs) and are purpose-built for the ServiceNow platform, reducing repetitive work and significantly improving productivity.

ServiceNow recently announced the Vancouver release, with a heightened focus on GenAI, broadening the customer engagement opportunities for the vendor with a growing customer set.

Strategic consolidation of partner programs indicates platform maturity and the evolution of service offerings, competence and innovation, all focused on delivering connected value. The technology and industry inclusion in workflow engineering aligns with market demand.

ServiceNow is transitioning from being a preferred ITSM process management tool to an enterprise-wide portfolio operations tool that drives a comprehensive customer-business-creator experience and value.



Key ServiceNow announcements in the past 12 months included a deepened relationship with NVIDIA and a revamped and realigned partner engagement model. This partner relaunch has enabled ServiceNow to improve partner-centric activities by realigning incentives and program details to maximize mutual benefits. ServiceNow partners have responded positively to the new program, gaining clarity on tiers and incentives, which is the most important factor.

The ISG Provider Lens™ ServiceNow Ecosystem 2024 study analyzes services and offerings from ServiceNow partners in the U.S., Brazil, Europe, and Australia, focusing on select segments. Enterprises seek accredited and reliable professional services (in multiple segments that ISG analyzes individually) to fully utilize ServiceNow's expanding functionalities, ranging from process redesign and software implementation and integration to increased requirements for application management and training. Partner companies' focus is indicated by their various offerings and certification levels, which can cover full-scale lifecycle support and specific services for distinct tasks.



Scope of the Report

This ISG Provider Lens™ quadrant report covers the following three quadrants for services/solutions: ServiceNow Consulting Services, ServiceNow Implementation and Integration Services and ServiceNow Managed Services Providers.

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 (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 IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT 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 IT 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 Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have 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 Services

Who Should Read This Section

This report is relevant to all European enterprises across industries for evaluating ServiceNow consulting service providers. In this quadrant, ISG highlights the current market positioning of ServiceNow consulting service providers and how each provider addresses the critical regional challenges. ISG defines the current positioning of these providers with a comprehensive overview of the competitive regional market.

In Europe, enterprises widely embrace the ServiceNow platform for digital transformation across various sectors. Their continual investments in digital transformation initiatives increase the need for consulting firms that can provide tailored solutions and implementation support for ServiceNow platforms.

Enterprises seek consulting service providers that can manage the challenges related to skill shortages and rising IT service prices because these high costs get passed on to the customers and may affect sales. While large enterprises in the region maintain their rapid adoption of innovations powered by ServiceNow, smaller enterprises are cautious, leading to delays in ServiceNow adoption.



Strategy professionals should read this report to understand the trends and changing patterns in the ServiceNow consulting area.



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.

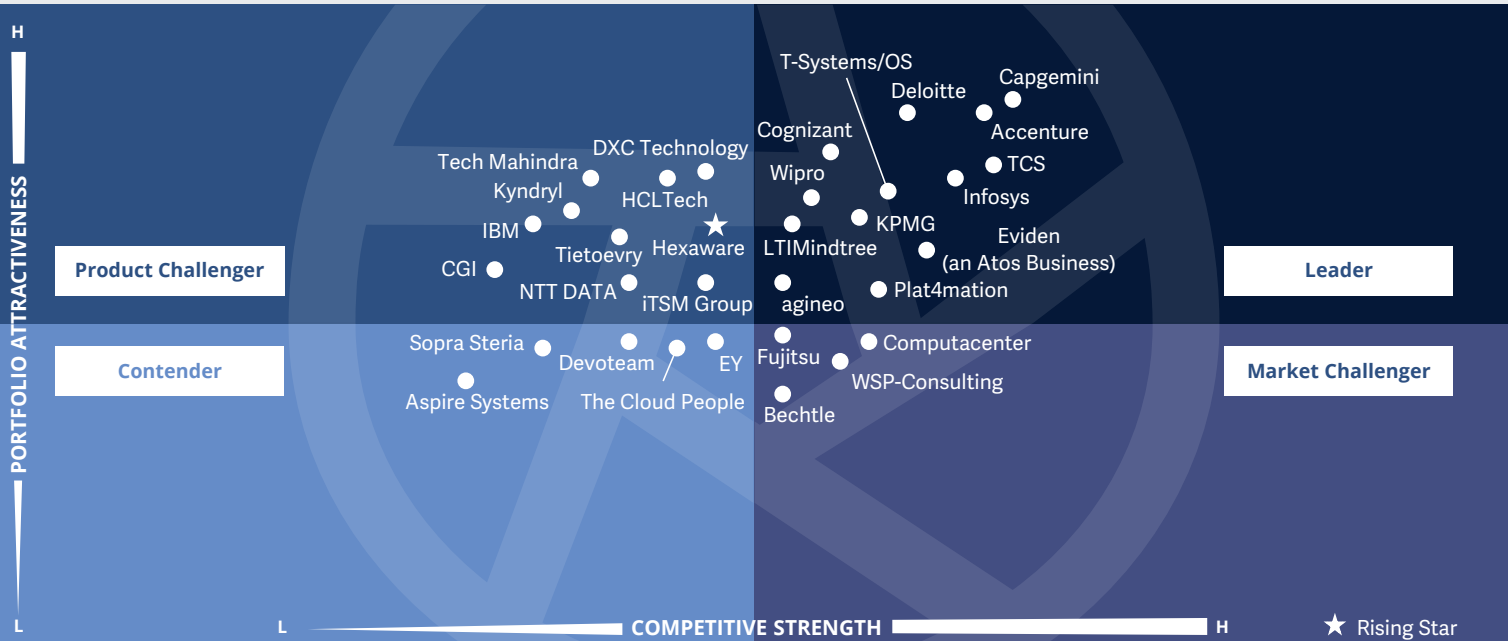


Technology professionals should read this report to learn about industry-specific solutions and the providers' prowess in conducting consulting assignments for various industries.



**ServiceNow Ecosystem Partners
ServiceNow Consulting Services**

Europe 2024



This quadrant assesses service providers' consulting capabilities in guiding the **adoption of emerging technologies** available on the ServiceNow platform. These new technologies drive **innovation in business solutions** and industry verticals.

Ashwin Gaidhani



Definition

This quadrant assesses consulting service providers that help clients prepare for workflow management services. ServiceNow consulting services are gaining traction, with two main drivers: the company's growth regions and new offerings, and because of new economic realities that raise enterprise emphasis on cost optimization. Many clients will face budget restrictions, emphasizing preserving existing investments.

Newer and strategic functionalities on the ServiceNow platform, including those in non-IT HR, finance, legal, facilities, environment, sustainability and governance (ESG) and governance, risk and compliance (GRC) workflows, are rapidly gaining importance as key priorities for clients across regions. Clients aspire to maximize operational and strategic value from their existing enterprise platform, which remains a fundamental aspect of their future strategy.

Strategic ecosystem partners in both IT and non-IT services identify and realize integrated workflow engineering opportunities for their clients.

Clients prefer consulting companies that have already invested in reference models and assessment methodologies, industry-specific benchmarking data and capabilities and have referenceable peers and verifiable outcomes from the platform. This enables these providers to understand clients' maturity and current challenges. Service providers should possess comprehensive knowledge of ServiceNow's technical capabilities and future releases, including new features, modules and technology solutions, such as Now Assist with GenAI capabilities. These tools help in designing non-linear workflow transformation solutions and deploy strategic platform value streams and roadmaps.

Utilizing ServiceNow as the primary enterprise engagement platform presents both challenges and opportunities. The platform's new functionalities in customer services, facility management, field services and ESG compliance offer various potential use cases. Designing roadmaps that maximize the platform's value for organizations is essential.

Eligibility Criteria

1. Use of reference models, templates and frameworks: **Implementing best practices** for opportunity identification and assessments for new **ServiceNow competencies; providing frameworks and tools for ROI and business case development** and benchmarks for realizing value
2. Experience in broad workflow and service management: **Designing client roadmaps** to use ServiceNow as an integrated "platform of platforms" for major enterprise business operations, IT services, **ESG and integration with GRC and security policies**
3. Ability to predict and leverage long-term disruptive technological developments:
4. Knowledge of ServiceNow capabilities and other tools: Understanding different releases, functional and **business processes supported** by ServiceNow, and expertise in ITSM and ITOM; specialization in areas such as **CSM, HR, F/A, facility management, ESG and security**

Using **integrative platforms capabilities** across technology ecosystems, including identifying opportunities for disruptive AI applications, such as **GenAI, transformers and LLMs; employing tools and methodologies** for market intelligence analysis with ML; actively participating in new-age technology communities and knowledge forums



5. Strategic approach and knowledge utilization of ServiceNow, Now platform and Now Assist in different industry scenarios: Providing **strategic guidance in vision and mission**; developing **industry-specific solutions**, such as in BFSI, healthcare, manufacturing and telecommunications; engaging in rapid engineering, experimentation and development, with new functionalities, for instance, GenAI on Now Assist
6. Possess relevant certifications: Holding ServiceNow **certifications and workflow badges**, expertise in ITIL 4, COBIT, DevOps and ESM-related accredited experience, ESG and GRC-related capabilities, integration experience and industry and region-specific regulatory knowledge
7. Experience in organizational change principles and practice: **Planning, delivering and supporting organizational changes** with proven case studies and client storyboards from various industries; **adoption and platform performance assessments** by industries of different sizes and levels of maturity



Observations

Enterprises are designing their platforms with scalability and flexibility, allowing them to quickly adapt to market changes, customer demands and new opportunities. This approach includes modular architectures and API-first strategies that facilitate integration and innovation. Hence, Certified Technical Architects (CTAs) and Certified Master Architects (CMAs) are critical in the consulting assignments during the ServiceNow value realization phase.

Focus on strategic technology guidance, managing change and consulting for business transformation:

Service providers emphasize strategic guidance and technology and change management. We see a growing involvement of consultants in the technical deployment of ServiceNow. They combine industry expertise, business process knowledge, technical understating of the enterprise and ServiceNow, resulting in a comprehensive strategy.

ServiceNow focuses on ESG and sustainability:

ESG criteria have become pivotal in shaping enterprise strategies. Companies invest in sustainable technology

solutions to reduce their carbon footprint, meet regulatory requirements and align with customer values. We see a growing need for guidance and consulting in this space to build and align strategies from the beginning.

Data privacy, security and GRC consulting gaining traction during ServiceNow adoption:

With increasing cyber threats and stringent data protection regulations (such as GDPR and California Consumer Privacy Act (CCPA)), enterprises prioritize adopting data privacy and security as part of their platform strategies. This initiative includes investing in advanced cybersecurity measures and privacy-by-design frameworks, which ensures multipoint security during ServiceNow integration.

From the 36 companies assessed for this study, 32 qualified for this quadrant, with 13 being Leaders and one a Rising Star.

accenture

Accenture's platform-led approach combines technology and industry transformation experience to deliver digital business workflows. In 2023, Accenture won the ServiceNow Worldwide Partner, APJ Partner, EMEA Partner and the Americas Partner awards.

agineo

agineo is a ServiceNow Reseller, Service Provider, Consulting & Implementation, and Build Partner with an Elite status. It is the largest ServiceNow provider in German-speaking countries, with over 150 ServiceNow consultants spanning over 11 locations.



Capgemini has been a ServiceNow Elite Partner and a Certified ServiceNow Global Alliance Partner since 2009. It has over 800 ServiceNow consultants and substantial expertise from more than 400 engagements.



Cognizant is a ServiceNow partner that leverages its large technology pool to drive business outcomes and digital transformation. Recently, it formed a strategic partnership with ServiceNow to increase the adoption of AI-driven automation across all industry verticals.

Deloitte.

Deloitte is a ServiceNow Global Elite Partner with over 11 years of experience delivering business transformation solutions to over 5,000 clients globally. It is a Consulting & Implementation Partner, Reseller, Service Provider and Build Partner with a CSAT score of 4.66/5.

EVIDEN

Eviden is an Elite ServiceNow Partner that delivers smart, secure and sustainable business solutions and creates business value and seamless client experiences. In 2023, the company launched a new solution built with ServiceNow to support SAP customers.



Infosys is a ServiceNow Elite Partner with a CSAT score of 4.46/5. GuideVision, Infosys' European subsidiary, specializes in customized ServiceNow consulting, implementations, training and support. It also offers SnowMirror, a data replication solution for ServiceNow.



ServiceNow Consulting Services



KPMG has a ServiceNow headcount of over 900 core FTEs and over 2,000 technical resources. It has a ServiceNow CSAT score of 4.58/5. In 2020, KPMG acquired WireFire, a leading ServiceNow provider, expanding its ServiceNow services for its clients' digital transformation initiatives.



LTIMindtree is a ServiceNow Reseller, Service Provider, Consulting & Implementation and Build partner. It has a pool of 650 core ServiceNow FTEs serving over 90 clients. In 2019, it acquired Lymbyc, an AI, ML and advanced analytics specialist.



Plat4mation is a ServiceNow Reseller, Service Provider, Consulting & Implementation, and Build Partner. It has more than 400 ServiceNow certifications and 150 ServiceNow clients. It is a global consultancy spanning nine countries with delivery centers in India and Poland.



TCS is a ServiceNow Elite Partner with a CSAT score of 4.2/5, 1,800 core ServiceNow FTEs and over 600 certifications. It has more than 250 ServiceNow clients globally and over 183 delivery centers.



T-Systems/OS is a ServiceNow Global Elite Partner offering consulting and implementation services. It is a Reseller, Service Provider, Consulting & Implementation, and Build Partner. T-Systems/OS won the 2023 ServiceNow Worldwide Partner and EMEA Partner of the Year awards for 2022 and 2023.



Wipro is a leading technology and consulting provider and a ServiceNow partner with over 1,500 core FTEs. It has global coverage with delivery centers spanning the U.S., LATAM, UK, EMEA and APAC, providing client-centric solutions.



Hexaware (Rising Star) is a ServiceNow Elite Partner with a 4.49/5 CSAT score and over 5 million hours of customer engagement experience. It has more than 80 ServiceNow consulting engagements globally and delivery centers in the Americas, APAC and EMEA.



Capgemini



“Capgemini has an industry-leading ServiceNow consulting talent pool in the European market, providing clients with domain-specific experience and operations expertise.”

Ashwin Gaidhani

Overview

Capgemini is headquartered in Paris, France. It has more than 342,700 employees worldwide. In FY22 the company generated €22.0 billion in revenue, with Applications and Technology as its largest segment. Capgemini has a diverse group of ServiceNow experts with extensive consulting experience and a client-driven approach. It holds multiple ServiceNow credentials in GRC, CSM and IT asset management. Capgemini and ServiceNow have partnered to develop industry-centric solutions for the aerospace and defense, public sector and retail industries.

Strengths

Employee experience as key platform

outcomes: Capgemini focuses on optimizing employee experience and bolstering customer service capabilities. It is committed to delivering comprehensive solutions that empower organizations with large legacy debts to navigate complex digital challenges effectively.

Industry talent pipeline in Europe:

Capgemini's ServiceNow consulting practice has made significant strides in the region through an enriched and deep domain- and industry-specific consulting talent pipeline. By investing in talent development, the firm will drive digital transformation across various European industries, further solidifying its reputation as a trusted ServiceNow consulting partner.

Benchmarkable industry-specific

solutions: Capgemini has unveiled innovative ServiceNow solutions for European clients. Leveraging ServiceNow's new platform versions and complex AI and predictive analytics features and modules, the company has built tailored offerings focused on streamlining IT, OT and business operations for sectors such as manufacturing and healthcare.

Caution

Capgemini can augment its European ServiceNow consulting's market-specific positioning by co-developing value propositions and showcasing them alongside its large, long-term customer entities in Europe.





ServiceNow Implementation and Integration Services

Who Should Read This Section

This report is relevant to all European enterprises across industries for evaluating ServiceNow implementation and integration service providers.

In this quadrant, ISG highlights the current market positioning of providers offering ServiceNow implementation and integration services to enterprises in Europe and how each provider addresses the critical challenges faced in the region.

ServiceNow's expansion of its offerings through acquisitions and regular updates may lead to overlaps with an enterprise's existing applications and investments. Many large European enterprises are early adopters and own complex legacy technology stacks and business service landscapes.

Thus, they need implementation and integration service providers with technical capabilities and industry expertise to address their business-specific requirements. In Europe, enterprises expect implementation and integration service providers to evaluate factors such as ROI, vendor lock-in and future security and licensing expenses and implement the optimal solution.



Strategy professionals should read this report to choose the suitable systems integration partner for ServiceNow implementation and development of a long-term technology road map.



Technology professionals should read this report to gain insights into the latest technology trends and patterns aligned with their company goals.

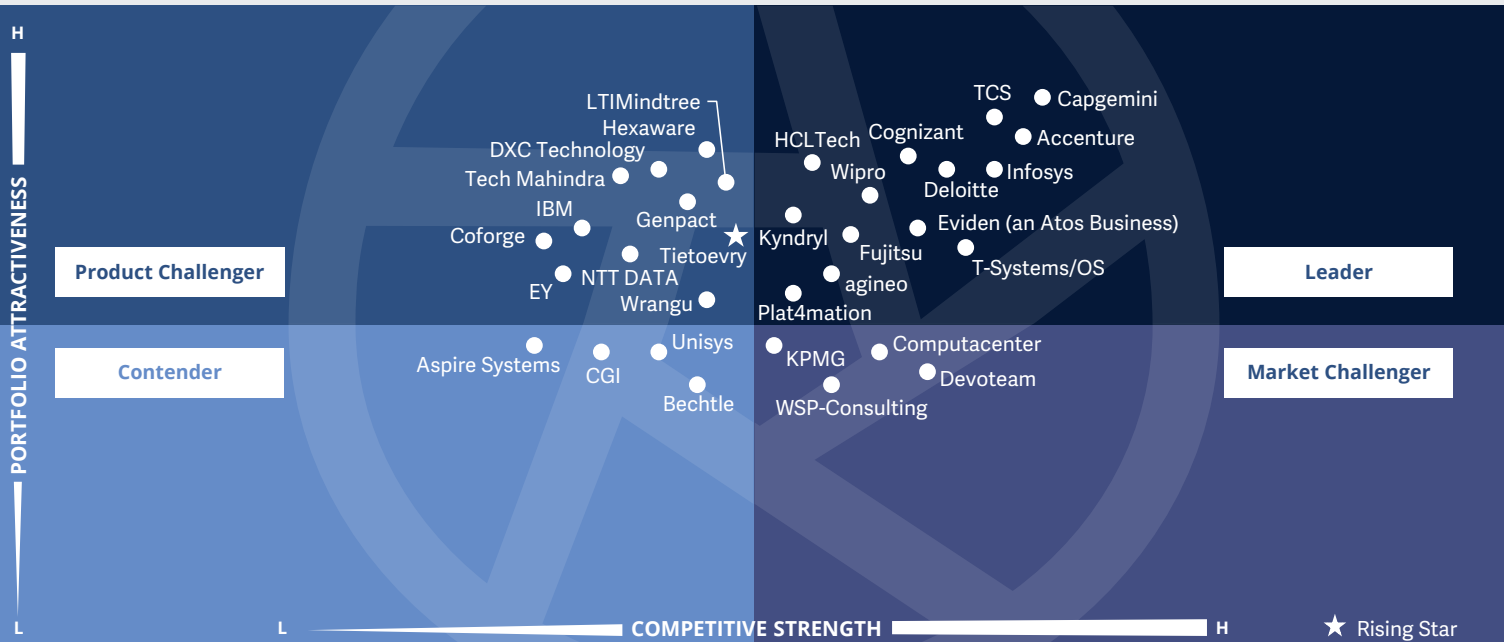


Engineering professionals can use this report to understand the developments in software solutions. Accordingly, they can invest in and build intellectual property and accelerators for cloud platforms for various industries.



ServiceNow Ecosystem Partners
ServiceNow Implementation and Integration Services

Europe 2024



This quadrant evaluates service providers with the **latest technology capabilities** in delivering **seamless ServiceNow platform implementation and integration**. Enterprise clients focus on the **accuracy and speed of platform deployment** with minimal disruptions to the ecosystem.

Ashwin Gaidhani



ServiceNow Implementation and Integration Services

Definition

ServiceNow serves as the central system that brings together external and internal clients, fulfilling requirements without adding to the organization's internal complexity. Implementing such an intelligent workflow platform in a complex enterprise requires expertise, experience and specialized capabilities for seamless integration with other applications, software and tools, minimizing data reformatting. The focus is on deploying industry-specific and functional solutions on the ServiceNow platform using newly added capabilities, which have become a growing strategic differentiator.

To meet the growing technical and business requirements, service providers must have reliable methodologies and an agile workforce trained in modern techniques and capable of rapid scaling. They also require excellent capabilities in system architecture, deep coding experience for low/no-code developments and a thorough understanding of AI and ML to embed intelligence into decision-making processes and simplify complex tasks.

Multicloud, multitenant architectures are highly complex, and the growing cybersecurity concerns prompt clients to seek highly efficient service providers. Service providers should also focus on obtaining certifications to demonstrate their credibility to clients.

Integrating advanced AI and ML capabilities on the ServiceNow platform, including the GenAI applications within the Now Assist modules, is quickly emerging and enabling the engineering and development of augmented enterprise workflows. These applications are built and tested in industry-specific solutions and services as well as technology services.

Eligibility Criteria

1. Use of predefined solutions, accelerators and templates: **Experience in Agile project management** (PMP certifications, SAFe and Scrum), continuous integration/continuous development, **DevOps best practices and toolchains**; proficiency in containerization platforms, application performance monitoring and platform-specific operation management tools
2. Experience with emerging technologies, including GenAI on Now Assist: experience in **enterprise shared services/ BPO, cloud and multicloud integration**, E2E management for ML techniques and **NLP and AI capabilities paired with cognitive computing to enable digital service management (DSM)**, virtual agents and self-service; expertise in enterprise workflow transformation and **cognitive knowledge leverage** applications experimented and developed using **GenAI services and the Now Assist platform**; experience in design and development across personas, such as customers and employees, **developing autonomous and automated experience delivery solutions**
3. Speed of adoption and value realization: **Deploy new features, modules and enhancements** on the ServiceNow platform in a **cost-effective and efficient manner**



ServiceNow Implementation and Integration Services

4. Ability to offer maintenance support: Support with installations, **upgrades and new feature/module release management**, migration, patch management, lifecycle management for ServiceNow instances and maintenance after **ServiceNow release migration**
5. Size and capabilities of local and global delivery teams: **Expertise in relevant ServiceNow technologies**, such as API development, JSON and Python
6. Experience in system, data and process integration: **Integration with the hub-and-spoke model** at various levels (starter, standard, professional and enterprise)



ServiceNow Implementation and Integration Services

Observations

ServiceNow is recognized as a hub for innovation and process engineering, providing a robust foundation for automation, orchestration, digital transformation, and development of bespoke applications, integrations and extensions tailored to unique business needs. It facilitates the improvement of existing business models and the creating of new ones, such as service orchestration, brokering and aggregation, highlighting its pivotal role in driving innovation and engineering excellence.

Growing need for ServiceNow expertise and advanced competencies: The rising demand for ServiceNow and its expanding complexity increase the need for proficient professionals and partners. These entities must possess new certifications and product line achievements tailored to specific regions alongside customer-validated badges. The segments that concentrate on developing, consulting and implementing solutions aligned with specific business needs are crucial for the successful execution of ServiceNow applications and modules. Therefore, there is

an extensive search for certified ServiceNow developers, administrators, consultants (CMA), architects (CTA) and project managers capable of delivering high-quality solutions and services.

Ad option of ServiceNow products and sector-specific solutions: ServiceNow's extensive product suite spans several areas, including IT, HR, customer service, security, risk and governance. Service providers are increasingly pursuing product line certifications to bolster their digital capabilities and optimize workflows. ITSM, ITOM, ITBM, CSM, security operations (SecOps) and GRC are among the most sought-after offerings.

From the 36 companies assessed for this study, 33 qualified for this quadrant, with 14 being Leaders and one a Rising Star.

accenture

Accenture is ServiceNow's largest Global Elite Partner and authorized training partner. It acquired Organize Cloud Labs, strengthening its existing IT capabilities and industry experience in cloud strategy, migration, implementation and management.

agineo

In 2024, **agineo** partnered with InfoBeans to empower global clients with a broader portfolio. The partnership strengthens the agineo team with more than 350 ServiceNow-certified experts. agineo was ServiceNow EMEA Customer Workflow Partner of the Year 2023.



Capgemini and ServiceNow leverage people, processes, technology, data and services to deliver superior experiences and sustainable business outcomes. In 2022, it was awarded the ServiceNow EMEA Employee Workflow Partner of the Year.



Cognizant is a ServiceNow Elite Partner that offers consulting and implementation services to clients. The company has 1,600 core ServiceNow FTEs. It has a CSAT score of 4.61/5 and over 290 ServiceNow clients.

Deloitte.

Deloitte is a ServiceNow Consulting & Implementation Partner that delivers implementation, integration, deployment and transformation services to its clients. It has over 1,000 ServiceNow FTEs and 200 ServiceNow clients.

EVIDEN

Eviden and ServiceNow share a 14-year-long partnership. It is a ServiceNow Gold Services, Gold Sales and Global ServiceNow Partner. The company provides implementation and support services to its customers worldwide through its global delivery capabilities.



Fujitsu, a ServiceNow Elite Partner with a 4.45/5 CSAT score, offers product lines on HR, App Engine and ITSM Standard for EMEA. The company has 12 skilled CMA and 22 CTA experts. It has a global presence with delivery centers in the Americas, AP&J and EMEA.



ServiceNow Implementation and Integration Services

HCLTech

HCLTech is a ServiceNow Reseller, Service Provider, Consulting & Implementation, and Build Partner with Elite status. It has more than 539 ServiceNow clients and a CSAT score of 4.4/5. The company has global coverage with more than 210 delivery centers and 60 innovation labs across 54 countries.

Infosys

Infosys is a ServiceNow Consulting & Implementation Partner with over 306 ServiceNow clients globally. The company employs over 3,150 ServiceNow service professionals. ServiceNow recognized it as the 2023 ServiceNow Worldwide Partner of the Year.

Kyndryl

Kyndryl has a ServiceNow Elite Partner status and is a Reseller, Service Provider, Consulting & Implementation, and Build Partner. It has over 1,600 core FTEs with a ServiceNow CSAT score of 3.67 /5. It has seven customer innovation centers globally.

PLAT4MATION

Plat4mation is a Service Elite Partner. It has a pool of more than 450 ServiceNow experts and 11 expert domains with a CSAT score of 4.3/5. It was the 2023 Worldwide Partner of the Year, the 2021 Global Partner of the Year and the EMEA Partner of the Year for 2021 and 2020.

TCS

TCS Crystallus™ on ServiceNow exemplifies strategic innovation in digital transformation by leveraging advanced AI and automation to enhance enterprise operations. This integration accelerates workflows, optimizes service management and fosters agility.

T Systems

T-Systems/OS and ServiceNow have had a longstanding partnership since 2014, delivering digital transformation solutions. T-Systems/OS employs over 250 ServiceNow experts and possesses over 300 certifications. ServiceNow was the EMEA Creator Workflow Partner of the Year 2022.



Wipro was the 2023 Worldwide Partner Award winner. In May 2023, Wipro and ServiceNow extended their partnership to invest in and develop new solutions to empower clients' business and digital transformation initiatives and increase business value.

TietoEvry

TietoEvry (Rising Star) is a ServiceNow Global Elite service provider, Reseller, and Consulting & Implementation Partner. The company joined the Sales and Service Provider Program in 2017 and was recently awarded the Elite Partner status in 2023.





“Capgemini has proven ServiceNow implementation capabilities in Europe, reflected in its long-term engagements with large regional enterprises.”

Ashwin Gaidhani

Capgemini

Overview

Capgemini is headquartered in Paris, France. It has more than 342,700 employees worldwide. In FY22 the company generated €22.0 billion in revenue, with Applications and Technology as its largest segment. Capgemini offers implementation and integration services built on the ServiceNow platform. The digital service integration and management (SIAM) solution enables digital transformation, creating business value. Digital SIAM integrates separately contracted IT services to deliver consistent business value while enhancing control by eliminating service duplication. Capgemini has enabled the adoption of AIOps on ServiceNow to transform IT operations.

Strengths

Strategic expansion in Europe: Capgemini’s ServiceNow implementation practice undertook a series of strategic initiatives in the European market to transform users’ digital experiences. Its large and proven European client accounts have been strategic growth stories in its ServiceNow platform portfolio. It works with government and public organizations globally to offer digital transformation strategies, technology delivery approaches and citizen-led innovations powered by the ServiceNow Now platform.

Leveraging accelerators, AI and analytics: Capgemini’s implementation teams harness AI-integrated modules from ServiceNow’s latest releases and their industry expertise to drive digital transformation for businesses in traditional and digital domains.

Latest platform implementation capabilities:

Capgemini has matured its industry-specific tailored solutions by leveraging ServiceNow’s latest platform capabilities to solve non-IT or IT-business technology-related client operational challenges. These solutions and tools optimize ITSM, enhance employee productivity and elevate customer satisfaction for clients across the manufacturing and services sectors.

Caution

The domain-specific expertise and experience of Capgemini’s ServiceNow engineers should be effectively highlighted and promoted on a large scale in the European market.





ServiceNow Managed Services Providers

ServiceNow Managed Services Providers

Who Should Read This Section

This report is relevant to all enterprises across industries in Europe for evaluating ServiceNow managed service providers.

In this quadrant, ISG highlights the current market positioning of ServiceNow managed service providers and how each provider addresses the critical regional challenges.

In Europe, enterprises focus on the providers' quality, availability and adaptability when selecting managed service providers.

They also seek providers who are well accustomed to their business, environment, and culture. With the frequent release of new ServiceNow versions, they seek providers that have resources with appropriate certifications and skill sets to ensure seamless operations on the latest iterations. They also prefer managed service providers that prioritize implementation service reviews and change management assessments consistently and periodically to maintain operational efficiency and foster better cooperation between the engaging parties.



Strategy professionals should read this report to understand service providers' capabilities in managing and supporting the maintenance of ServiceNow solutions across all company portfolios.



Service line and functional professionals should read this report to rationalize the fitment of ServiceNow resources and workflows across all their services.

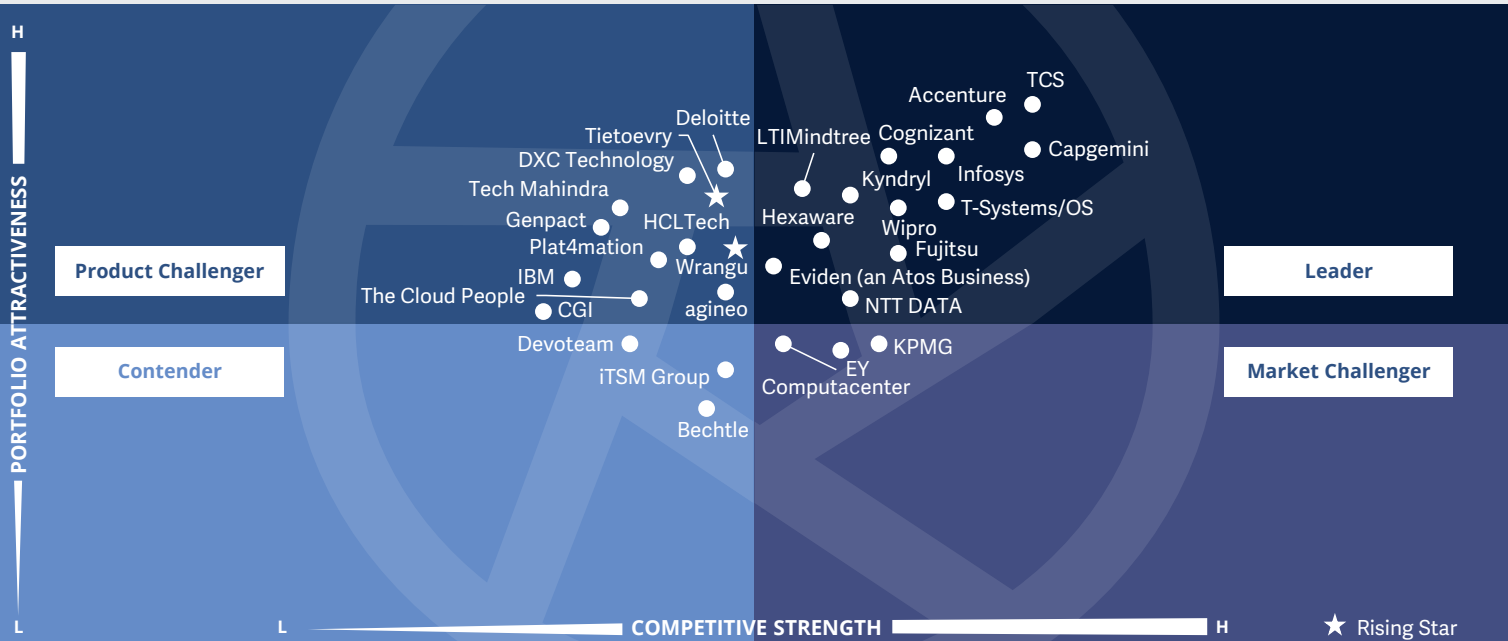


Service delivery professionals should read this report to understand how ServiceNow managed service providers retain their credibility and service quality.



ServiceNow Ecosystem Partners
ServiceNow Managed Services Providers

Europe 2024



This quadrant evaluates ServiceNow managed service providers focusing on **the efficiency** and **effectiveness** of the ServiceNow platform’s performance and management. It aims to simplify the complexity between ServiceNow and **business systems**, enhancing **enterprise resilience**.

Ashwin Gaidhani



ServiceNow Managed Services Providers

Definition

This quadrant assesses providers based on their ability to offer managed services for maintenance and support functions, including monitoring, remote support and centralized management of the Now platform, workflows and associated applications.

With the growing popularity of the DevOps method, managed service providers are expected to comply with a new set of requirements. These providers need to be prepared for the platform's continuous evolution, which can challenge the status quo of the existing solution and managing two new releases in a short period.

Considering the complexity of workflows that require support, providers must deliver services globally and across different organizational domains. They must manage a highly sophisticated and integrated application landscape, demonstrating how they operate within or integrate with a multivendor environment.

When analyzing providers in this quadrant, factors such as maintenance effectiveness, data quality management, data security and compliance are taken into account. Managing multicultural aspects, especially in nearshore/offshore delivery cases, is as important as offering different deployment options, considering potential data privacy and residency concerns. Offering different pricing options due to the new economic situation in many countries is also significant.

As ServiceNow increasingly becomes the unified enterprise platform, effectively managing its lifecycle and services assets built and operated on top of it poses a critical challenge along its long-term maturity curve. Evaluating the platform costs and license management versus the value and ROI realization of the strategic platform assets is also essential, considering CloudOps and FinOps capabilities on the platform. Managing the risks associated with critical features and workflows on the platform is another essential capability required for effective RiskOps.

Eligibility Criteria

- 1. Experience with support:** Involves extensive experience with ServiceNow's Now platform, workflows, third-party applications, integrators and accelerators, newly released features/modules and upgrades
- 2. Delivery capabilities:** Efficient delivery with proximity to clients
- 3. Technology partnerships:** Partnerships with key software providers and a comprehensive application management service (AMS)- related portfolio
- 4. Service integration and management (SIAM) and delivery models:** Expertise in managing ServiceNow in broader applications under CloudOps, such as AIOps, MLOps, FinOps, RiskOps and ITOps
- 5. Delivery and contract models maturity:** Ability to
- 6. Broad customer base:** Includes local use cases and references
- 7. Intelligent, adaptive and progressive maintenance:** In sync with upgrades and functionality enhancements from ServiceNow and technology ecosystems, and with service integrators, in-house engineering teams (external partners and specialized tool providers)
- 8. Ability to manage decentralized deployment within the organization:** Adoption of low-code/no-code and citizen developer techniques; offering training for identification and delivery; providing user knowledge updates on new releases, versions, features and modules



ServiceNow Managed Services Providers

Observations

The dynamic nature of the ServiceNow ecosystem in Europe emphasizes the need for strategic partnerships, skilled talent and cost-effective implementation strategies. Companies adept at navigating these aspects will be optimally positioned to leverage ServiceNow's capabilities for driving digital transformation. The escalating demand for ServiceNow expertise highlights its widespread applicability across various sectors, including IT, HR, customer service, security, risk and governance.

Expanding partnerships with service providers and enterprise clients in Europe: Recognized for its excellence in ITSM, ITOM and ITBM, ServiceNow's platform is increasingly becoming the cornerstone of digital transformation initiatives. Enterprises are actively seeking partnerships that provide customized ServiceNow solutions, aiming to drive innovation across the European regions.

Increasing demand for certified ServiceNow talent in Europe: Europe has a competitive market for skilled ServiceNow experts, ranging from administrators and developers to consultants and architects.

Consequently, organizations invest in training and certification programs to enhance their in-house capabilities while seeking service providers distinguished for their certified proficiency.

Focus on cost optimization of ServiceNow platforms: Like observed with other enterprise software, there is an intense focus on optimizing the costs associated with deploying and maintaining ServiceNow solutions. Companies are meticulously evaluating the returns on their ServiceNow investments, exploring avenues to augment efficiency and curtail superfluous expenses.

From the 36 companies assessed for this study, 31 qualified for this quadrant, with 13 being Leaders and two Rising Stars.

accenture

Accenture leverages its proprietary Cloud Continuum thought leadership to deliver service- and work experience-led outcomes. It acquired Solvera Solutions in 2023, specializing in managed service capabilities across ServiceNow, SAP and Microsoft platforms.

Capgemini

Capgemini delivers as-a-service offerings and managed services with more than 150 ServiceNow accelerators. It holds over 2,000 ServiceNow certifications. In 2022, Capgemini was awarded the HRO Today Association EMEA Best in Class: Employee Experience and Retention Award.

cognizant

Cognizant is ServiceNow's Elite and an authorized partner. The expanded alliance between Cognizant and ServiceNow is expected to help accelerate the path toward building a \$1 billion combined business for Cognizant and ServiceNow.

EVIDEN

Eviden was recognized as the ServiceNow EMEA Service Provider Partner of the Year in 2020 for its excellence in delivery and ServiceNow pipeline growth. Recently, it unveiled its OneCloud initiative to accelerate clients' cloud migration journey.

FUJITSU

Fujitsu is a ServiceNow Service Provider with a CSAT score of 4.45/5. It recently acquired Enable. Together, their strength is 350 ServiceNow consultants holding over 950 certifications. Fujitsu won the 2023 Worldwide Partner, APJ Partner and EMEA Partner of the Year awards.

HEXAWARE

Hexaware is a ServiceNow Reseller, Service Provider, and Consulting & Implementation Partner. It has over 63 unique ServiceNow customers. Its global team of more than 400 ServiceNow experts operates from over 15 delivery locations and holds over 500 ServiceNow certifications.

Infosys

Infosys, a global software and managed service provider, is an Advanced Platform ServiceNow Build Partner. Some strategic partners of Infosys and ServiceNow are Career, Qualtrics, SupportLogic and LogicMonitor. Infosys was a Global Partner award winner for 2022 and 2021.



ServiceNow Managed Services Providers

kyndryl

Kyndryl is a Global Elite Partner with more than 500 ServiceNow clients. It delivers cloud-based managed services to drive customer success and digital transformation. The company has over 1,000 ServiceNow mainline and micro certifications, including Master Architect.



LTIMindtree is a ServiceNow Global Elite Partner. The company has a CSAT score of 4.78/5. It was the Americas Partner of the Year for 2023 and ServiceNow Global and Americas Partner of the Year for 2022. Its delivery centers are located in North America, EMEA and India.

NTT DATA

NTT DATA is a ServiceNow Elite Partner. It is a Reseller, Service Provider, Consulting & Implementation, and Build Partner. It was an APJ award winner for 2021 and 2022. It acquired Sapphire, a ServiceNow partner, to extend its offerings in the UK and U.S. markets.



TCS has been pioneering application management and support in many areas using the industry's leading standards and framework integrated with ServiceNow. TCS' Machine First Delivery Model Framework (MFDM™) is an approach for intelligent maintenance for applications.

T Systems

As a managed service provider, **T-Systems/OS** is an Elite Partner that provides solutions in sales, service and technology-enabling features from the ServiceNow cloud. It offers enterprise service management (ESM) solution and end-to-end support along the value chain.



Wipro, a leading technology services and consulting company, is a Global Elite Partner specializing in technology excellence, employee excellence, operational excellence, hyperautomation and low code, finance, procurement and supply chain.

tietoevry

Tietoevry (Rising Star) is a ServiceNow Service Provider Partner that delivers as-a-service offerings and managed services to drive scalable customer success. The SIAM solution powered by the ServiceNow platform offers development and implementation, application maintenance, and the SIAM hub upgrades and scales applications.

Wrangu

Wrangu (Rising Star), a Global Elite Partner, has a CSAT score of 4.8/5. It specializes in integrated risk management and compliance management. The company is an ISO 27001-certified information security management organization.





“Capgemini’s dedicated and comprehensive strategy for ServiceNow managed services helps the company win enterprise clients in Europe.”

Ashwin Gaidhani

Capgemini

Overview

Capgemini is headquartered in Paris, France. It has more than 342,700 employees worldwide. In FY22 the company generated €22.0 billion in revenue, with Applications and Technology as its largest segment. Capgemini’s Intelligent People Operations (IPO) powered by ServiceNow empowers HR with all capabilities on a single platform, increasing productivity and enhancing optimization. It has also developed a solution for franchise owners. Powered by ServiceNow, the solution allows customers to manage and automate business workflows. It involves onboarding new franchisees, training employees, facilitating compliance and managing marketing campaigns.

Strengths

Boosting employee satisfaction:

Capgemini’s ServiceNow® HR Service Delivery (HRSD) Gold Build, a multichannel employee helpdesk configured with a master service catalog, enhances employee satisfaction. The platform simplifies employee and manager portal implementation, empowering HR teams to deliver standardized, critical HR processes to their clients. It drives HR workflow automation, increasing employee satisfaction and improving HR productivity.

Transforming business agility:

Capgemini’s broad service portfolio covers end-to-end managed services for the ServiceNow platform. This comprehensive offering equips clients to leverage ServiceNow platform services fully.

Capgemini transformed a Denmark-based client’s agility by implementing ITSM based on the ServiceNow platform. It developed a ticketing system for employee use and automated workflows, allowing employees to focus more on sales than administrative tasks, thus fostering a more productive and efficient work environment.


Dependable European partner:

In the ServiceNow ecosystem, Capgemini’s focus on GRC has established it as a reliable partner for organizations in Europe aiming to optimize their ServiceNow investments. This partnership empowers organizations to attain sustainable growth and maintain an advantageous position in the dynamic business environment.

Caution

Capgemini has the potential to enhance its market-specific positioning in Europe for its ServiceNow managed service practices. To achieve this, the company can collaborate with its large European clients to develop unique value propositions and present them as joint GTM.





Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.



Appendix

The ISG Provider Lens 2024 – ServiceNow Ecosystem Partners study analyzes the relevant software vendors/service providers in the Europe 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 services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of March 2024, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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



Lead Analyst

Ashwin Gaidhani
Research Partner

Ashwin Gaidhani has a comprehensive view of IT shared-managed services portfolios and digital business transformation initiatives with approximately two decades of experience. As an ISG Research Partner and subject matter expert in enterprise services, IT governance and digital technologies, he is presently contributing as a Lead Author with the ISG Provider Lens™ team. Ashwin comes to this work with business and technology

experience revolving around service management, management consulting, emerging capabilities (AI and intelligent automation), work design methodologies and implementation frameworks



Research Analyst

Arjun Das
Research Specialist

Arjun Das is a senior research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Enterprise Service Management, ServiceNow Ecosystem, Banking Platforms and Services and SAP HANA Ecosystem Services. He supports the lead analysts in the research process and authors the global summary report. Arjun also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments as well.

Arjun has helmed his current role since 2020. Prior to this role, he has worked across several syndicated market research firms and has more than eight years of experience across research and consulting, with major areas of focus in collecting, analysing and presenting quantitative and qualitative data. His area of expertise lies across various technologies like IoT, artificial intelligence, VR/AR and blockchain.





Study Sponser

Aman Munglani
Director and Principal Analyst

Aman Munglani leads the ecosystems and custom research practice for ISG. He brings over twenty years of expertise in emerging technologies and industry trends. His career is marked by significant contributions in guiding top executives from Global 2000 companies, offering strategic advice on digital transformation, start-up partnerships, driving innovation, and shaping technology strategies.

In his tenure exceeding twelve years at Gartner, Aman focused on providing CIOs and IT executives across Asia Pacific and Europe with insights on the practical implementation and advancement of new technologies, the evolution of infrastructure, and detailed vendor assessments.



IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, 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](#).

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including AI and automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.





MAY, 2024

REPORT: SERVICENOW ECOSYSTEM PARTNERS