ISG Provider Lens™

ServiceNow Ecosystem Partners

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

Customized report courtesy of:

HCLTech

QUADRANT REPORT | APRIL 2025 | EUROPE

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Report Author: Ashwin Gaidhani

ServiceNow: Putting Agentic AI to work to radically transform EX and CX

Data security and compliance plays a significant role in Europe's uptake of digital platforms

European enterprises prioritize the compliance of their workflows with stringent regulations such as the GDPR and Digital Operational Resilience Act (DORA), and this includes a focus on robust data security and privacy. There is a high demand for solutions that can address specific regional needs, including language requirements. Enterprises are increasingly focusing on sustainability and ESG. ServiceNow has made significant investments in Europe-centric service delivery, including a multimillion-euro investment to ensure data compliance and to support highly regulated industries. Enterprises that are a part of the EU require their data to be stored and processed within the region to comply with data sovereignty regulations. ServiceNow addresses this need through EU-centric service delivery models and regional data centers. Highly regulated industries, such as financial services, face significant challenges to keep data secure and compliant at all stages of their workflows. ServiceNow's DORA Accelerator is designed to help financial services organizations in Europe comply with the regulation. Providers are utilizing ServiceNow's Integration Hub to connect with third-party tools and services relevant to DORA compliance, and this includes integrating with security tools, ITSM tools and other essential systems to automate data exchange and synchronization, ensuring compliance and reducing the risk of penalties.

The ServiceNow platform integrates various compliance and security features across modules, ensuring a unified approach for these critical areas and helping enterprises with various regulatory requirements. Its IRM module helps organizations identify, assess and mitigate risks through continuous monitoring and automated workflows, and its governance,

ServiceNow is emerging as the **agentic development platform** to drive total experience.

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risk and compliance (GRC) module enables organizations to meet the necessary standards. Adherence in this area eliminates information silos, giving enterprises a comprehensive view of their compliance postures. The GRC module automates compliance, reducing manual effort and ensuring accuracy and timeliness. This automation is crucial to deal with the evolving nature of regulations.

Training and change management support instills trust in enterprises in Europe

Enterprise dynamics in Europe are different from that in the U.S. or in the Asia Pacific and Japan (AP&J)region. Most successful service providers focus on deep collaborations with their clients, taking an empathetic and pragmatic approach. Providers ensure users are well-equipped to utilize the ServiceNow platform effectively, leading to high adoption rates, a smooth transition and improved productivity. Change management helps in planning and executing a smooth transition from old systems to the ServiceNow platform by addressing the human side of change, ensuring that employees are prepared and supported throughout the process. By involving stakeholders early and communicating the benefits of the new system, change management helps minimize resistance. This is crucial for gaining buy-in and ensuring a successful implementation. In addition, training programs help employees develop the necessary skills to leverage the full capabilities of ServiceNow. This includes understanding new workflows, automation features and integration capabilities — factors that are particularly important for ITSM and GRC requirements.

ServiceNow continues to invest for enterprise growth in Europe

In October 2024, ServiceNow announced a $1.5 billion (£1.15 billion) investment in its U.K. business over the next five years. This investment will focus on expanding office space, significantly growing its employee base beyond the current 1,000 and enhancing its AI capabilities. ServiceNow plans to upgrade its London and Newport data centers with NVIDIA GPUs for local processing of large language model (LLM) data and to offer new AI skills programs to 240,000 U.K.-based learners. Through ServiceNow Ventures, it has invested in pure-play ServiceNow providers, fueling innovations in software in Europe. It focuses on investing in and supporting emerging companies with cutting-edge technologies that enhance the ServiceNow platform, workflows and target markets. Such investments offer foresight into market trends and emerging players. The key investment areas include AI, ML, hyperautomation, distributed cloud, and data intelligence. Beyond financial investment, ServiceNow Ventures provides guidance to companies at all growth stages, from product strategy validation to scaling go-to-market initiatives. This unique investment strategy is a major catalyst for ServiceNow's growth in Europe and the rest of the world. As the company continues to innovate and broaden its portfolio, the ServiceNow platform and its workflow-related products and solutions increasingly intersect with a wide array of market trends and disruptions.

Unique industry-specific workflows are becoming increasingly relevant in Europe

Industries such as manufacturing, energy, and retail and the public sector are primarily adopting digital workflows. ServiceNow is revolutionizing workflow management by addressing complex challenges and streamlining operations. In the manufacturing industry, ServiceNow's cloud capabilities have significantly reduced manual labor costs and improved real-time workload management. The retail industry benefits from centralized ITSM, leading to rapid response times and enhanced employee empowerment. In the energy industry, ServiceNow's managed services have modernized IT environments, increased user acceptance and expanded platform capabilities. In the public sector, entities such as the Gloucestershire County Council have seen improved service delivery and collaboration through integrated customer portals and centralized resources.

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These examples highlight ServiceNow's ability to provide tailored solutions that enhance efficiency, reduce costs and drive strategic growth. Across these industries, there is a growing demand for architecture consulting, particularly in complex environments that involve multiple ServiceNow modules and integrations. It is pivotal to create reusable assets and accelerators to provide out-of-the box functionalities and solutions catering to specific industries.

In Europe, data security and compliance are crucial factors to consider while adopting a digital platform. Effective training and change management for implementing the ServiceNow platform among European enterprises help build trust among users, while concurrently ensuring secure and compliant operations.

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Provider Positioning

	ServiceNow Consulting and Implementation Services	ServiceNow Managed Services	Innovation on ServiceNow
Accenture	Leader	Leader	Leader
Agineo	Leader	Leader	Rising Star ★
Atos	Leader	Product Challenger	Leader
Brillio	Contender	Not In	Product Challenger
Capgemini	Leader	Leader	Leader
Coforge	Product Challenger	Product Challenger	Not In
Cognizant	Leader	Leader	Leader
Computacenter	Market Challenger	Product Challenger	Not In
Deloitte	Leader	Leader	Leader
Devoteam	Rising Star ★	Market Challenger	Product Challenger

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Provider Positioning

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

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Provider Positioning

	ServiceNow Consulting and Implementation Services	ServiceNow Managed Services	Innovation on ServiceNow
iTSM Group	Not In	Contender	Not In
KPMG	Market Challenger	Market Challenger	Market Challenger
Kyndryl	Product Challenger	Leader	Product Challenger
LTIMindtree	Product Challenger	Leader	Leader
NTT DATA	Product Challenger	Product Challenger	Product Challenger
Plat4mation	Leader	Rising Star ★	Leader
Sofigate	Market Challenger	Contender	Product Challenger
Sopra Steria	Product Challenger	Product Challenger	Contender
Stefanini	Contender	Contender	Contender
TCS	Leader	Leader	Leader

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Provider Positioning

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	ServiceNow Consulting and Implementation Services	ServiceNow Managed Services	Innovation on ServiceNow
Tech Mahindra	Product Challenger	Leader	Leader
The Cloud People	Contender	Not In	Product Challenger
Tietoevry	Leader	Contender	Contender
T-Systems	Leader	Leader	Leader
Unisys	Contender	Contender	Contender
UST	Product Challenger	Not In	Product Challenger
Wipro	Leader	Leader	Leader
Wrangu	Contender	Product Challenger	Product Challenger

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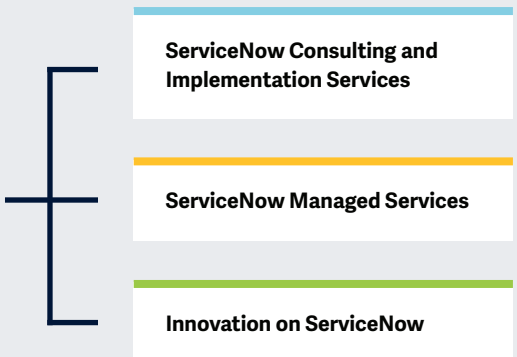
ServiceNow **drives innovation, scalability and industry-specific solutions**, offering a competitive edge in automation, AI and digital transformation.



Simplified Illustration Source: ISG 2025

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 impacting the global digital landscape.

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Scope of the Report

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

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on the regional market

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

Provider Classifications

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

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

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

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

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Provider Classifications: Quadrant Key

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

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

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ServiceNow Consulting and Implementation Services

Who Should Read This Section

This report is valuable for service providers offering ServiceNow consulting and implementation services in Europe 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 provider addresses key regional challenges.

Strategy professionals

Should read this report to understand the trends in the ServiceNow consulting area and select the right systems integration partner to develop a long-term technology roadmap 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.

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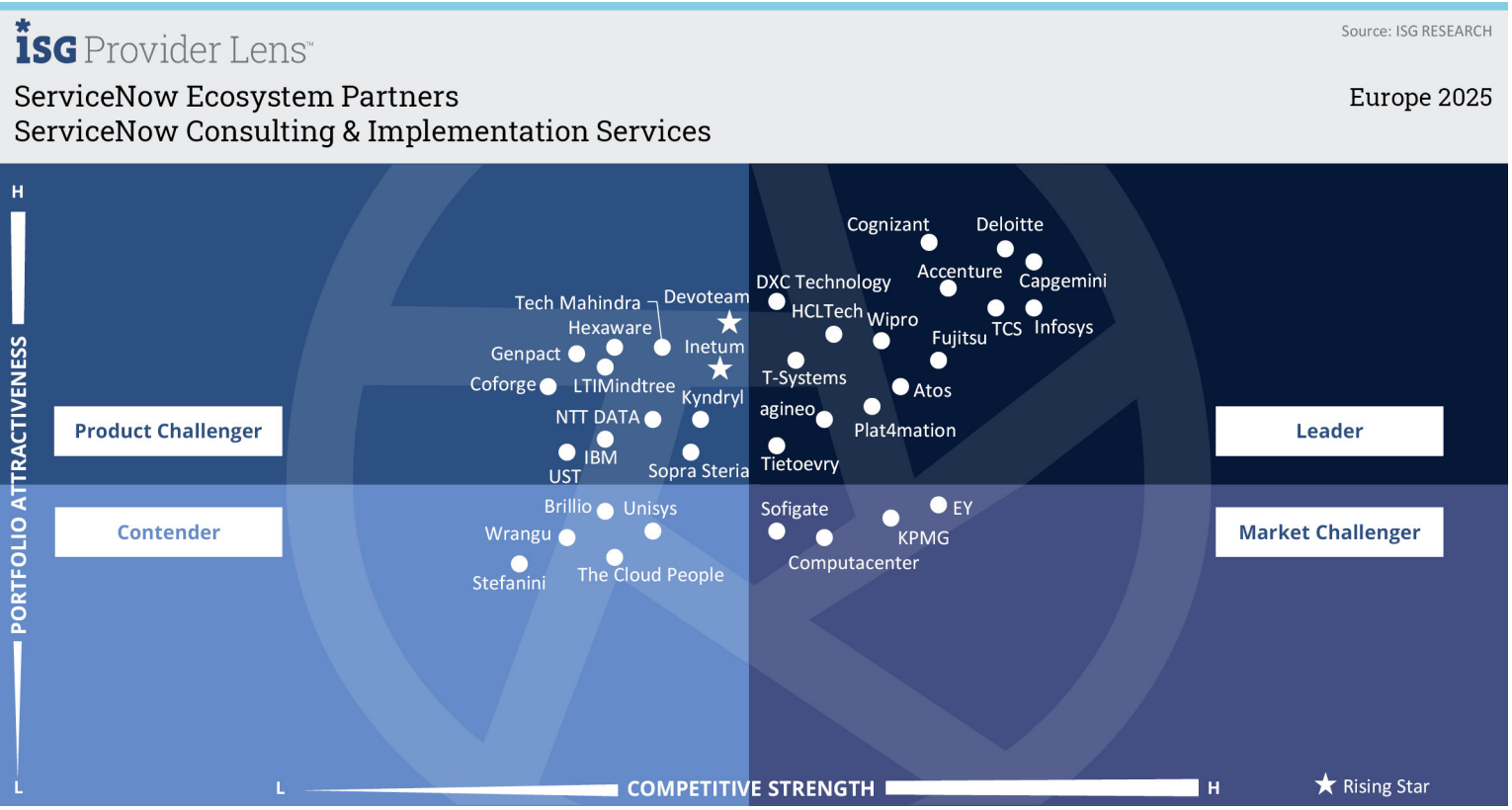

This quadrant evaluates **providers' expertise in transforming enterprise workflows** through consulting and by implementing and integrating ServiceNow solutions that include various **IT and non-IT modules.**

Ashwin Gaidhani

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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 digital workflows for strategic outcomes.

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-andspoke model at starter, standard, professional and enterprise levels
8. **Successful implementations:** completed projects validated through case studies/client testimonials

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Observations

Various trends are visible in the ServiceNow consulting and implementation space. These include:

Emphasis on industry-specific solutions

Several providers have developed specialized frameworks for banking, manufacturing, healthcare and public sector organizations. The tailored offerings address stringent compliance requirements, integrate seamlessly with legacy systems and support complex workflows. Focusing on domain-specific accelerators, ServiceNow partners in Europe are differentiating themselves with their deep regulatory expertise and ability to speed up time to value, thus fostering trust among organizations.

Integration of advanced technologies

The ServiceNow Workflow Data Fabric that leverages generative AI (GenAI), predictive analytics and hyperautomation has reshaped the ServiceNow ecosystem, enabling increasingly proactive service delivery. Leading service integrators have embedded AI solutions, next-best-action frameworks and self-healing capabilities into their implementation services. This evolution empowers organizations to predict incidents, automate routine tasks and optimize processes, thereby achieving enterprisewide measurable efficiency gains and enhanced UX.

Heightened Focus on ESG and governance

ServiceNow partners are aligning their consulting and implementation offerings with corporate priorities in terms of sustainability, governance and risk management. Service providers have introduced ESG modules, compliance monitoring capabilities and dedicated reporting dashboards to address environmental and social obligations. By interweaving GRC components into workflows, firms can swiftly respond to new regulations, reduce reputational risks and improve stakeholder confidence. New solutions in this space track carbon footprints, thereby helping organizations comply with sustainability guidelines.

From the 38 companies assessed for this study, 36 qualified for this quadrant, with 15 being Leaders and two Rising Stars.

accenture

Accenture has been recognized as the 2024 Technology Workflow Partner of the Year for EMEA for providing high-quality digital services, enhanced UX, advanced security and minimized risk. It has considerable experience in IT service management (ITSM), IT operations management (ITOM), IT asset management (ITAM) and customer service management (CSM) in Europe with multiple large-scale implementations.

Atos

Atos combines its Elite Partner status, comprehensive service offerings, industry-specific expertise, proven track record and innovative approach to offer its services, making it a standout player in the ServiceNow ecosystem in Europe.

agineo

agineo is positioned as the largest ServiceNow partner in DACH and as a specialist in ESM. It specializes in implementing and integrating ServiceNow solutions, leveraging its expertise to streamline and optimize complex business processes for clients, which has earned it a CSAT score of 4.73.

Capgemini

Capgemini provides a full range of consulting and implementation services, ensuring seamless deployment and integration of ServiceNow solutions. It has a strong track record of successful implementations, wherein it has helped clients achieve significant improvements in productivity, efficiency and customer satisfaction.

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Cognizant's comprehensive approach, industry-specific expertise and focus on innovation in the ServiceNow ecosystem make it a standout partner that drives digital transformation and delivers exceptional value to clients.

Deloitte bagged 2024 Elite partner of the Year for EMEA recognition, which has deepened its partnership with ServiceNow across Europe in the areas of governance, risk and compliance (GRC), workplace/workforce, security, enterprise ESG, HR workflows and hyperautomation. Deloitte's robust offerings for the financial services, manufacturing and healthcare industries and the public sector are notable in Europe.

DXC Technology has a strong presence in Europe in the consulting and implementing ServiceNow solutions space. Recognized as the 2024 Creator Workflow Partner of the Year for EMEA, it has significant expertise in driving the maximum impact of Now Platform® for its clients.

Fujitsu's comprehensive approach, industry-specific expertise and strong integration capabilities make it a standout player in the ServiceNow ecosystem in Europe. It has won several EMEA Partner awards.

HCLTech provides comprehensive implementation and consulting services, including platform configuration, workflow optimization and system integration. It demonstrates its expertise and customer success through proven practices across multiple ServiceNow modules.

Infosys has positioned itself as a frontrunner in ServiceNow consulting and implementation, with over a decade of collaboration with ServiceNow. Its AI-powered, plug-and-play Enterprise Service Management (ESM) Café solution is designed to expedite ServiceNow implementations by 40 to 50 percent.

Plat4mation

Plat4mation, being a pure-play ServiceNow partner, has deep expertise in the platform and delivers high ROI through its strategic consulting and implementation services. It has carried out a range of challenging projects in the ServiceNow space and created reusable assets to execute out-of-the-box implementations on time and within budgets.

TCS offers a wide range of services on the ServiceNow platform. Together with ServiceNow, it focuses on creating intelligent workflows, automating processes and delivering significant process efficiencies.

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Tietoevry provides tailored solutions for various industries, ensuring that its ServiceNow implementations are relevant and effective for specific business needs. This includes ITSM, HR, CSM and finance modules.

T-Systems excels in integrating ServiceNow with other enterprise platforms, ensuring seamless data flow and process automation across these platforms. This capability enhances overall efficiency and operational effectiveness for a client.

Wipro provides strategic planning and advisory services to help clients align their ServiceNow implementations with critical business goals. Wipro's FullStride Cloud, combined with ServiceNow, is a powerful solution for managing multicloud environments. This integration, known as BoundaryLess Enterprise, leverages Wipro's cloud capabilities and ServiceNow's platform to provide a unified framework for multicloud provisioning and governance.

Devoteam (Rising Star) has a track record of successful projects with leading organizations, supporting them in achieving their digital transformation goals. Its expertise spans various industries and includes notable projects with companies like Asahi, Telia, Husqvarna and Coca-Cola HBC.

Inetum

Inetum (Rising Star) is an Elite ServiceNow partner with a significant presence in Europe. It has ramped up its ServiceNow practice in recent years with a high CSAT score. The company has product line achievements across nine ServiceNow modules, which is one of the highest in Europe.

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Leader

"HCLTech's ServiceNow consulting approach helps enterprises realize cost savings and enhance cross-department efficiency and productivity."

Ashwin Gaidhani

HCLTech

Overview

HCLTech is headquartered in Noida, India. It has more than 227,400 employees across over 215 delivery centers worldwide. In FY24, the company generated $13.3 billion in revenue, with IT and Business Services as its largest segment. HCLTech has developed various programs for the effective implementation and integration of the ServiceNow platform for clients. For instance, its ValueNow program excels in the detailed analysis of platform configurations, workflows and integrations, effectively handling issues related to platform complexity, performance bottlenecks and adherence to industry best practices.

Strengths

Consulting on GenAI use cases: HCLTech has been focused on transforming service delivery on ServiceNow for clients of various sizes through an intelligent value stream, spanning ERP, SCM and CRM. HCLTech and ServiceNow have planned their partnership to deliver new GenAI-based solutions. This collaboration is aimed at helping enterprises adopt ServiceNow's GenAI capabilities across their businesses quickly and efficiently.

Intellectual property assets: Under its global partnership with ServiceNow, HCLTech offers consulting, design, implementation and managed services across ServiceNow's entire suite of products. By bringing together ServiceNow products and its industry expertise, proprietary assets and global delivery capabilities, HCLTech delivers use cases and solutions, enabling enterprises to adopt ServiceNow's domain-specific GenAI offerings to transform their operations.

Codeveloping industry solutions with ServiceNow: HCLTech has significantly advanced its ServiceNow consulting and implementation practice, focusing on integrating AI (GenAI and Agentic AI) to enhance efficiencies and leverage knowledge for ESM. This strategy paves the way for the codevelopment of industry-specific innovative solutions on ServiceNow in Europe.

Caution

HCLTech should differentiate its ServiceNow partnership by delivering legacy transformation use cases and solutions to enable even traditional enterprises to adopt ServiceNow's industry-specific GenAI.

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ServiceNow Managed Services

Who Should Read This Section

This report is valuable for service providers offering ServiceNow managed services in Europe to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers and examines how each provider addresses key regional challenges.

Strategy professionals

Should read this report to understand service providers' capabilities to manage and support the maintenance of ServiceNow solutions across portfolios.

Service delivery professionals

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

Service line and functional professionals

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

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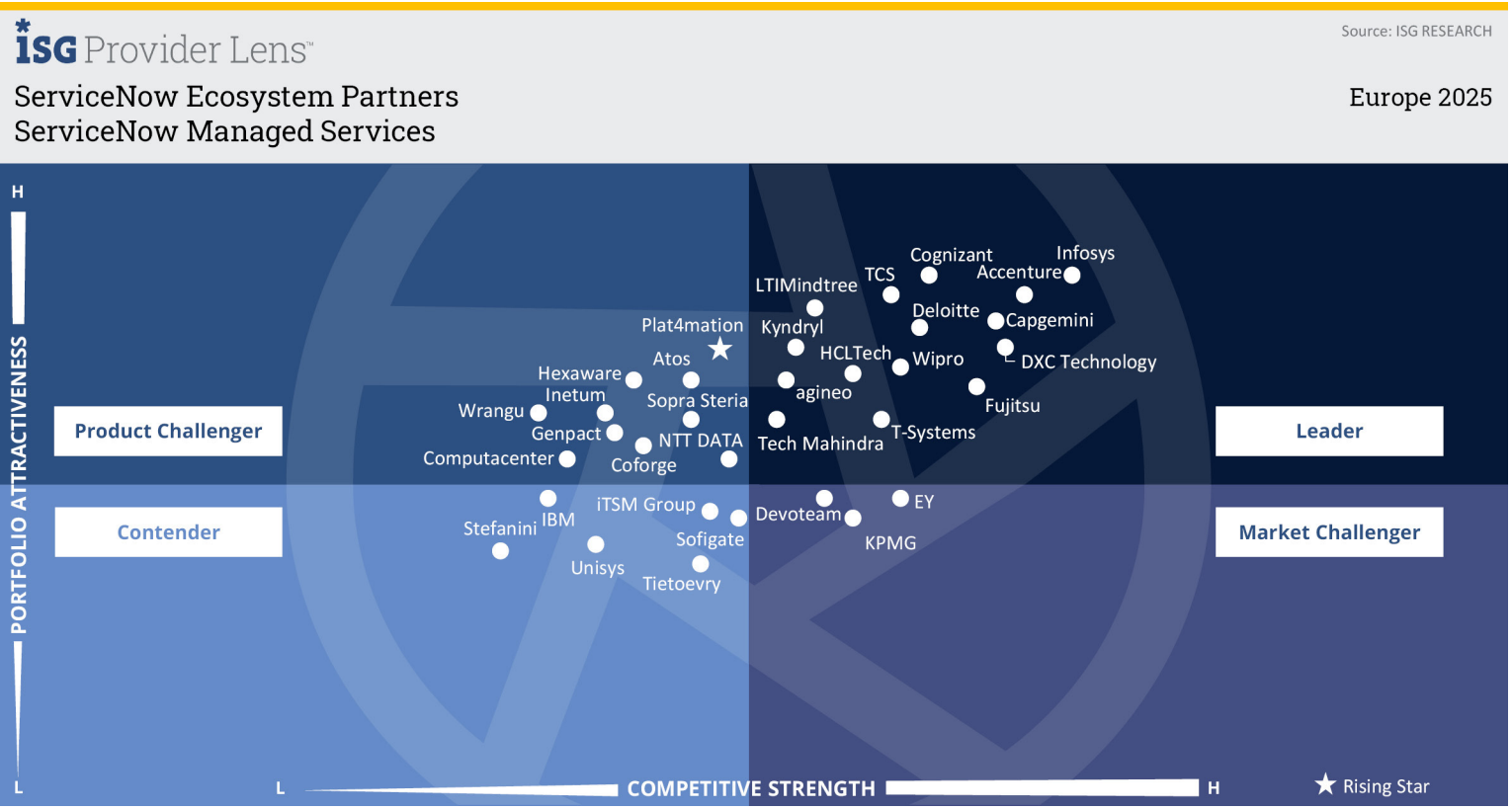

This quadrant assesses **providers' competency** in managing the operations and performance of the ServiceNow platform, covering **CloudOps, FinOps and RiskOps,** to ensure a seamless experience for enterprise clients.

Ashwin Gaidhani

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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.

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Eligibility Criteria

1. **Experience with support:** experience with the Now platform®, workflows, third-party 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

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Observations

The ServiceNow managed services market in Europe has grown significantly in the past year, driven by the demand for continuous optimization and robust support frameworks. Enterprises seek strategic partnerships that deliver proactive platform performance, outcome-based success metrics and holistic governance. This focus on managed services, especially CSM and business operations, is influenced by mounting regulatory requirements, rapidly evolving cloud infrastructures and increasing investments to ensure consistent CX. Leading service providers are diversifying their portfolios with customized solutions, platform expertise and cutting-edge automation to stay competitive. As a result, the European ServiceNow ecosystem has become increasingly dynamic, with top players emphasizing reliability, innovation and long-term strategic advisory. The following trends are visible in the ServiceNow managed services space:

Shift toward proactive platform operations

European enterprises are showing a marked preference for proactive and automated platform operations. ServiceNow partners are integrating observability, predictive analytics and risk management frameworks into managed services, enabling real-time monitoring and early detection of potential disruptions. This approach minimizes downtime, reduces operational expenses and ensures continuous compliance with stringent data protection regulations. Providers are differentiating themselves by offering comprehensive dashboards, embedded AI and advanced analytics to guide rapid decision-making and deliver on SLAs.

Emphasis on ROI and outcomes management

A notable trend among providers is a focus on demonstrating tangible business value through measurable ROI and outcome-based engagements. Enterprises increasingly demand tangible performance metrics covering cost and process efficiencies and enhanced customer satisfaction to justify long-term managed services partnerships. Service providers are responding by developing standardized outcome-tracking tools, tailored dashboards and governance models that substantiate clear gains across departments — from HR and finance to procurement and IT.

Expansion of experience management

Enhancing platform usability and user satisfaction have emerged as significant priorities. Service providers are focusing on improving their experience management capabilities, leveraging personalization, intuitive interfaces and continuous feedback loops. These enhancements align with broader transformation goals, ensuring employee engagement, smooth adoption and rapid onboarding. Through consistent platform updates, guided user journeys and proactive support, enterprises can better optimize ServiceNow's functionalities and realize sustainable business impacts.

From the 38 companies assessed for this study, 34 qualified for this quadrant, with 15 being Leaders and one a Rising Star.

accenture

Accenture provides a full spectrum of managed services on ServiceNow, tailored to meet the diverse needs of European clients. These include change management support, helping organizations navigate transitions effectively, understand impacts and ease user adoption.

agineo

agineo is an Elite ServiceNow Partner with considerable managed services experience within the DACH region. It is recognized for providing expertise and ensuring high customer satisfaction, making it a reliable choice for organizations looking to optimize their ServiceNow platforms.

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Capgemini

Capgemini's comprehensive digital service integration and management (SIAM) assets expedite client transformations by tailoring components to enhance value delivery on a ServiceNow module. To support this, Capgemini has set up several digital SIAM-specific CoEs globally.

cognizant

Cognizant's managed services improve IT effectiveness and promote business stability through reimagined solutions. It provides a consistent service model and a comanagement approach across the world for seamless services.

Deloitte.

Deloitte has invested in ServiceNow managed services through its latest offering Breakthrough.ESM. This new approach to modernization combines ServiceNow solutions with Deloitte's industry-leading design, capabilities, superior industry knowledge and domain experience in Europe.

DXC TECHNOLOGY

DXC Technology is focused on enhancing its delivery and operational capabilities, developing new applications and strengthening its service offerings on the ServiceNow platform. Its ServiceNow solutions support a wide range of industry use cases, extending ITSM capabilities to several business functions.

FUJITSU

Fujitsu offers scalable managed services, including proactive optimization, continual change management, upgrade assurance and security assessments. It has won the RiseUp with ServiceNow Partner of the Year 2024 recognition and commands a healthy pipeline of certified ServiceNow resources worldwide.

HCLTech

HCLTech delivers as-a-service and managed services to drive customer success at scale. Its services include ongoing support, maintenance and optimization of ServiceNow environments to ensure they continue to meet business objectives sustainably.

Infosys

Infosys was recognized as EMEA Service Provider Partner of the Year 2024 by ServiceNow. In 2024, it enhanced its partnership with ServiceNow to deliver comprehensive managed services by leveraging the AI capabilities of Now Platform® and the Infosys Enterprise Service Management (ESM) Café solution.

kyndryl

Kyndryl provides a wide range of managed services and solutions on the ServiceNow platform, including IT service management (ITSM), IT operations management (ITOM) and IT asset management (ITAM). Kyndryl has successfully implemented IT solutions for various clients in Europe.

LTIMindtree

LTIMindtree offers extensive training programs for its employees, covering various ServiceNow modules such as ITSM, ITAM and integrated risk management (IRM) and related certifications. It has around 500 consultants with more than 1,300 certifications worldwide and significant expertise in App Engine.

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TCS has extensive experience in workflow management and stands out as a reliable partner for enhancing ITSM through ServiceNow. It offers comprehensive administration, continuous optimization, and robust training and support to manage ServiceNow deployments and innovate as needed.

Tech Mahindra's One E2E Platform combines advanced analytics, AI and automation to optimize network operations and drive business growth. Operating in over 90 countries, Tech Mahindra delivers solutions with a blend of digital innovation and robust industry processes.

T-Systems enhances its employee skills, while simultaneously contributing to the ServiceNow ecosystem. It has developed upskilling programs for both clients and employees, ensuring alignment with Deutsche Telekom's initiatives. As a design partner and advisory council member, T-Systems actively engages in community initiatives, leveraging the program to gain a competitive edge and build robust relationships.

Wipro provides complete management of ServiceNow platforms, including routine maintenance, upgrades and performance optimization. Its services are scalable, allowing organizations to adjust resources based on their needs, ensuring cost-effectiveness and flexibility.

Plat4mation

Plat4mation (Rising Star) has a strong managed services offering, which is further augmented by the introduction of Quality4U, a comprehensive service designed to enhance and control the quality of ServiceNow instances. Its Success Services framework enables effective governance, clear vision and measurable benefits.

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HCLTech

Leader

"HCLTech distinguishes itself through its SIAM-as-a-service model, AIOps-enhanced ITSM automation and ESG-focused SustainableITNow framework that enable clients to achieve scalability, enhance operational efficiency and ensure proactive ITSM."

Ashwin Gaidhani

Overview

HCLTech is headquartered in Noida, India. It has more than 227,400 employees across over 215 delivery centers worldwide. In FY24, the company generated $13.3 billion in revenue, with IT and Business Services as its largest segment. HCLTech helps clients simplify their ServiceNow deployments, reducing technical debt and avoiding excessive customizations that can increase costs. With a robust team of ServiceNow experts, HCLTech provides around-the-clock support, ensuring seamless business operations and reducing downtime for clients.

Strengths

Domain- and industry-aligned managed services: By leveraging domain- and industry-specific IT landscape knowledge, HCLTech provides end-to-end managed services for enterprise implementations of the ServiceNow platform. This collaboration between industry, domain and platform expertise aims to help clients manage their operational and technology needs through strategic enhancements in applications and infrastructure.

Leveraging AI in managed services: HCLTech's strategic initiatives in ServiceNow managed services, coupled with its integration of GenAI, strengthen its position as a Leader in this quadrant. Through the optimization of internal processes and collaborative partnerships, HCLTech continues to set new benchmarks in delivering value-driven solutions to enterprises across Europe.

Focus on business outcomes: HCLTech's AI-powered, industry-focused managed services approach helps enterprises realize cost savings and enhance efficiency and productivity across departments through strategic ServiceNow platform implementations. The company supports clients at every stage, from ideation to the implementation of the right digital solutions that drive business outcomes.

Caution

HCLTech's cost-efficient and outcome-driven managed services offerings should help clients implement the right digital solutions. A focus on direct and indirect outcome assessments, beyond just process productivity, can be a game changer for the company.

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Innovation on ServiceNow

Who Should Read This Section

This report is valuable for service providers offering ServiceNow solutions in Europe 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. It showcases providers' ServiceNow innovation capabilities through the NowAssist platform, facilitating increased adoption of the ServiceNow platform.

Chief strategy and innovation professionals

Should read this report to understand how ServiceNow supports digital transformation and competitiveness, helping in strategic planning and long-term growth through innovation.

Business line managers

Should read this report to understand the ServiceNow platform's IT and non-IT capabilities, including Build with NOW and Build on NOW solutions, helping achieve cost-reduction goals.

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.

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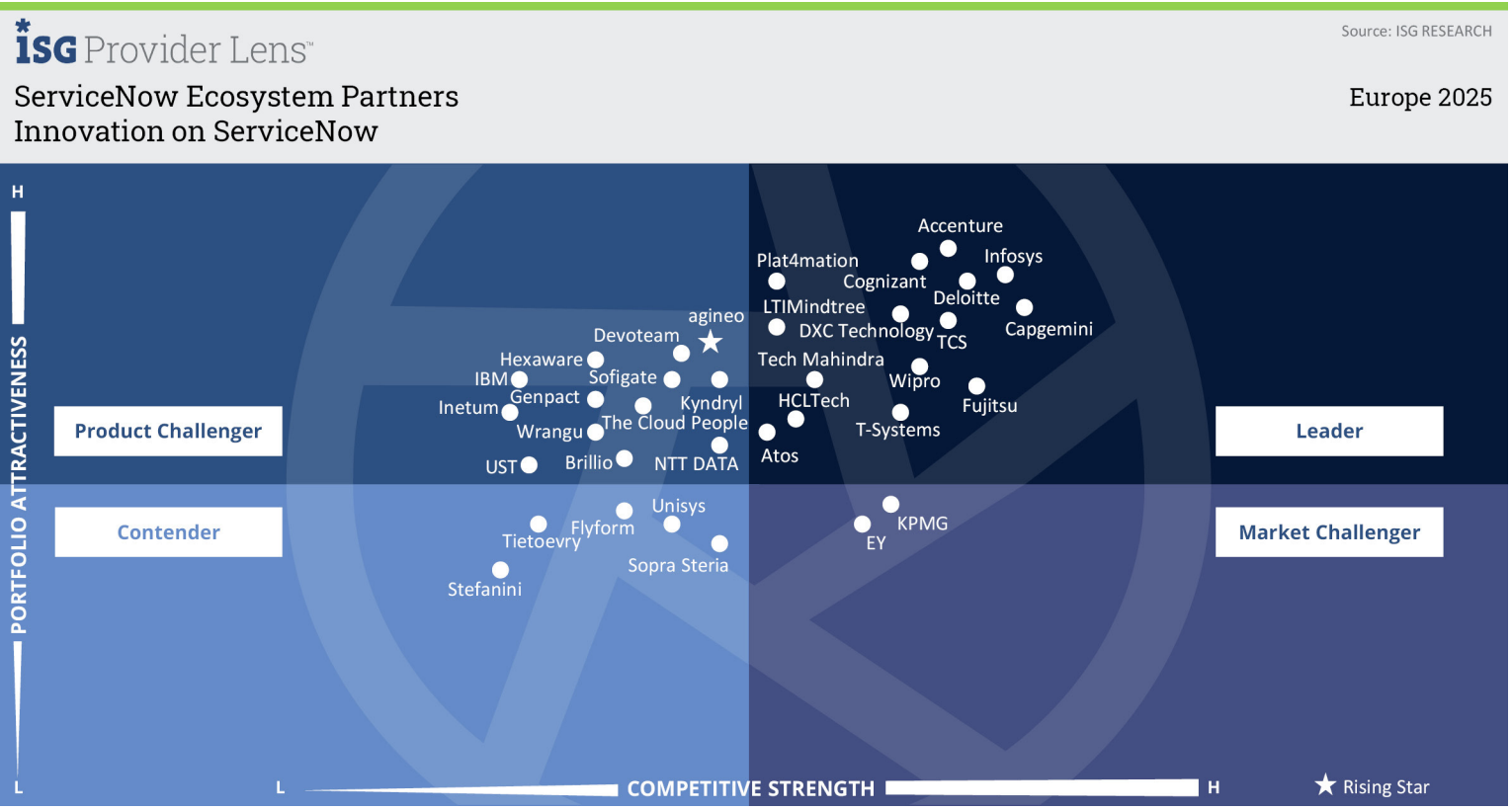

This quadrant evaluates providers focusing on digital transformation by developing **out-of-the-box solutions on Now Platform® — a high-focus area for all the stakeholders** in the ServiceNow ecosystem.

Ashwin Gaidhani

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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

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Observations

Europe's ServiceNow partner ecosystem has experienced a sudden shift, driven by the demand for rapid digital transformation and a focus on value realization. With Now Platform® at the core, service providers are evolving from traditional integrators into strategic partners that design, build and deploy intelligent workflows. Leveraging emerging technologies such as generative AI (GenAI), AIOps and advanced automation, providers are delivering customized solutions and tailored industry accelerators. The rise of Built with Now and Built on Now ServiceNow models is reshaping collaboration patterns, where coinnovation efforts between enterprise clients and providers are helping establish next-generation workflows and customized industry-specific solutions that are ready to deploy and reduce time to value. Ultimately, these shifts underscore a growing emphasis on optimization, personalization and sustained competitive advantage in Europe's rapidly maturing ServiceNow market. Some of the trends apparent in the ServiceNow innovation space are:

Surge in GenAI and AIOps adoption

A key trend is the rapid implementation of GenAI and AIOps solutions to streamline operations, enhance predictive capabilities and accelerate decision-making. ServiceNow partners are embedding NOW Assist GenAI into core applications, enabling automated incident resolution, knowledge management and proactive support. Similarly, AIOps frameworks leverage ML to predict service disruptions, facilitate root-cause analysis and foster self-healing in workflows. Such advancements create resilient environments, reduce downtime and increase IT efficiency.

Industry-focused and function-specific solutions

Global system integrators (GSIs) have introduced vertical and horizontal accelerators, built on the Now Platform. By combining domain expertise with ServiceNow's App Engine and Integration Hub, providers can rapidly tailor workflows for banking, telecommunications and manufacturing industries and the public sector. This approach ensures compliance with industry regulations, while addressing functional requirements such as HR digitization, finance automation and supply chain orchestration. Consequently, clients benefit from reduced complexity and short deployment cycles.

Coinnovation through expansion of platform functions

Service providers are increasingly partnering with enterprises to codevelop advanced solutions that personalize UX, hasten ROI and extend ServiceNow's core functionalities. By leveraging the low-code approach, automation engines and enterprise service management automation, these collaborations foster agile development and continuous improvement. This coinnovation model accelerates prototype-to-production timelines and creates sustained, value-driven outcomes that align closely with evolving organizational needs and market dynamics.

From the 38 companies assessed for this study, 35 qualified for this quadrant, with 15 being Leaders and a Rising Star.

accenture

Accenture integrates AI and ML capabilities into the Now Assist platform to improve service delivery, automate responses and analyze customer interactions for meaningful insights. Accenture has consistently demonstrated ServiceNow innovation through Built with Now and Built on Now solutions to support specific business processes and industries.

Atos

Atos leverages Now Assist to create industry-specific AI solutions with replicable use cases and prebuilt templates. This approach allows for rapid deployment and customization, addressing unique challenges in different industries.

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Capgemini's extensive experience in delivering industry-specific ServiceNow solutions by leveraging Built on Now and Built with Now platforms has established it as a trusted partner across various industries such as telecommunications and media, financial services and life sciences and the public sector.

Cognizant's strategic partnership with ServiceNow focuses on accelerating the adoption of AI-driven automation. This includes the integration of Cognizant's AI-led Neuro® suite of platforms with ServiceNow's intelligent platform.

Deloitte bagged 2024 Transformation Partner of the Year for EMEA recognition. It has been actively expanding its AI capabilities, partnerships and offerings in the wake of launching its GenAI practice in 2023. Together with ServiceNow, it has developed the blueprint for GenAI integration to identify and execute the best use cases to create business value for clients.

DXC Technology has established a joint CoE with ServiceNow to streamline AI adoption, which combines DXC's industry expertise with ServiceNow's AI-based solutions to help clients accelerate their AI journey. Its AI Impact offering combines consulting, engineering and secure enterprise services with ServiceNow's GenAI solutions.

Fujitsu uses Now Assist to evaluate customer processes and implement solutions that are powered by the latest AI technologies, ensuring data sovereignty and compliance.

HCLTech combines Now Assist with its Total Experience (TX) approach, which encompasses innovation experience, UX, CX and business experience components. This comprehensive approach breaks down silos and fosters interconnected experiences, enhancing satisfaction and engagement across all touchpoints.

Infosys is investing in developing a Pro Plus BOT factory, which can offer more than 100,000 Now Assist-powered chatbots. These chatbots can help clients realize value in their AI journey by automating customer interactions and providing intelligent support.

LTIMindtree leverages partnerships and strategic investments instead of building AI solutions from scratch. For instance, it has committed $6 million to Voicing AI, a startup specializing in human-like AI voice agents.

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Plat4mation

Plat4mation is a preferred go-to-market partner of ServiceNow for GenAI in Europe. Its Ready 4 Now Assist consultancy service guides clients through deploying Now Assist/GenAI on the ServiceNow platform using a phased approach that includes design, development and maintenance.

TCS uses GenAI to simplify business processes, enhance operational efficiency and reduce technical debt. This approach supports continuous transformation and adapts to disruptive changes in a business environment.

Tech Mahindra has introduced innovative service offerings for clients and demonstrated robust capabilities in developing solutions on the ServiceNow platform, particularly in integrating GenAI through the Built on Now and Built with Now initiatives.

T-Systems' commitment to innovation is evident in its application of GenAI across multiple domains. For instance, it has developed AI-powered solutions that automate network monitoring and maintenance tasks.

Wipro leverages the Now Assist platform to drive innovation and enhance productivity through GenAI. It has developed a structured GenAI strategy that aims to help clients adopt and integrate AI technologies into their workflows and processes.

agineo

agineo (Rising Star), as a Build Platform partner, has extensive experience in the length and breadth of the ServiceNow platform. It focuses on developing and implementing innovative enterprise service management (ESM) solutions that streamline business processes and enhance operational efficiency.

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Leader

"HCLTech's leadership in GenAI applications built on ServiceNow has been consistently recognized in the industry."

Ashwin Gaidhani

HCLTech

Overview

HCLTech is headquartered in Noida, India. It has more than 227,400 employees across over 215 delivery centers worldwide. In FY24, the company generated $13.3 billion in revenue, with IT and Business Services as its largest segment. HCLTech offers advanced AI-driven support and automation, improving decision-making and operational efficiency on the Now Assist platform. It leverages the low-code/no-code approach to enable rapid app development and deployment. Such solutions help businesses quickly adapt to changing needs and drive innovation.

Strengths

Context-aware AI capabilities: HCLTech's global support for ServiceNow deployment includes industry-specific examples of the platform's impact. The partnership between HCLTech and ServiceNow has enabled enterprises to adopt GenAI and Agentic AI capabilities with a vertical solutions approach quickly and efficiently. This approach is leading to cost savings and enhanced cross-department efficiency and productivity.

Dedicated AI Lab: HCLTech and ServiceNow have further strengthened their partnership by inaugurating a dedicated AI Lab. This facility allows clients to pilot, navigate and scale innovative solutions tailored to address industry-specific challenges. The same experiences are also accessible in the HCLTech AI & Cloud Native Lab in global locations. The labs leverage HCLTech's industry-leading and proven methodologies to assist clients in their GenAI and agentic AI journeys with ServiceNow, driving efficiencies in ESM and various industry verticals.

Talent leadership: HCLTech's leadership in GenAI on ServiceNow services has been consistently recognized in the industry. The company's consultative approach and collaboration with ServiceNow allow it to continuously drive business outcomes for clients by cocreating transformation offerings. It also invests to expand its pool of industry and technology experts.

Caution

HCLTech should expand its capabilities to envision, codesign and cobuild Now Assist GenAI use cases for clients, especially leveraging the new modules and functionalities available with the latest Xanadu release.

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Appendix

Methodology & Team

The ISG Provider Lens 2025 – ServiceNow Ecosystem Partners research 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.

Study Sponsor:
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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

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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 Analyst

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.

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Study Sponsor

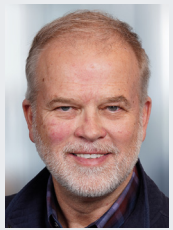
Aman Munglani

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.

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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.

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ISG Provider Lens™

APRIL, 2025

REPORT: SERVICENOW ECOSYSTEM PARTNERS

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