

***ISG** Provider Lens™

ServiceNow Ecosystem Partners

Germany 2021

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:



April 2021

About this Report

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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 April 2021, 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.

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EXECUTIVE SUMMARY

Technology Meets Process Maturity

It is commonly known that ITIL has been in use as a process basis in Germany for decades. Thus, local companies have achieved a level of process maturity in IT operations that is hard to find anywhere in the world. Also, in this regard there is no difference between large companies and the upper midmarket, nor are there any discernible differences between the individual industry segments. Because of this robust structuring of IT processes, companies are able to adapt innovations relatively quickly. It is only a vanishingly small number of companies that do not use ITIL today. And the use of this process framework also means that the market for system management tools in Germany is relatively well saturated. After many companies implemented different point solutions for different subject areas in IT management in the past, the market is currently on the move again. On the one hand, companies are recognizing that the process philosophies applied in IT can be applied relatively easily to other business processes, and that collaboration across process, and thus organizational, boundaries can lead to competitive advantages. On the other hand, the technology now available, supported by the use of artificial intelligence, machine learning, data analysis and natural language processing, offers a level of maturity that allows companies to automate and integrate established processes to the greatest possible extent.

Especially the process and manufacturing industry, which is widespread in Germany, can benefit from the great depth of integration and cross-organizational automation. While companies look for strong process automation and integration there is a trend to migrate smaller point solutions into larger automation platforms.

"ERP for CIOs"

Without a doubt, ServiceNow has established itself as the market leader wherever the greatest possible process automation is required. The primary aim in this case is not to support individual manual tasks with an electronic workflow, but rather to integrate and harmonise the process landscape of an entire company using a wide variety of technologies and to free it as much as possible from manual requirements. With this approach, the company achieved total sales amounting to more than US\$4.5 billion in 2020, with the lion's share of over \$4.2 billion coming from the licensing business. ISG conservatively estimates the total revenue from all services based on ServiceNow's software to be well over \$12 billion. At the same time, more than 6,900 customers worldwide use ServiceNow's products, of which nearly 1,100 customers have an annual contract value of more than \$1 million. In total, more than 13,000 employees ensure a satisfied customer base, with 99% of all contracts currently being renewed.

Developed as a software suite in a Platform-as-a-Service model, ServiceNow was originally positioned as a type of ERP suite for CIOs. In addition to an easy-to-use interface, modules were provided that worked on a case-based basis (case management), and thus, mapped ITIL-based IT processes. Using new technologies, the degree of automation of the processes has been continuously increased. The system enables financial evaluations and risk management as well as the control of company guidelines on a uniform database. The rapid provision of new functionalities was driven by the targeted acquisition of software companies that were leaders in their specialist fields or were preparing to take up management positions.

At present, more and more user companies are asking themselves whether an agile workflow platform is a better solution than a rigid ERP system for the establishment of automated incident processing in companies. Particularly against the background of the digitalisation strategies of many companies, where it is often only now being comprehensively realized that the predominant activities in companies are handled in processes, a solution such as ServiceNow is becoming increasingly attractive.

Service Management has already established itself in many companies as a philosophy rather than a single discipline limited to IT. Experienced companies have recognized that the basic elements of service management can be very useful not only for the efficiency of their own company, but also for the loyalty of the company's customers, or rather is already regarded by them as a competitive criterion. These include clear requirements management, the development and provision of a service catalog based on defined requirements, structured change management or clear service remuneration, as well as the complete management of the necessary internal and external suppliers. The buzzword user experience or UX sends its regards.

Due to the complexity and variety of requirements of this comprehensive service management, one of the keys to success for ServiceNow is the large network of different partner companies. Since, on the one hand, there are large differences in the requirement profiles between the individual customers and, on the other hand, industry-specific requirements must be considered, flexibility and expandability in this environment is a major challenge.

ServiceNow's approach is basically relatively simple: the provision of a workflow platform that is easy to customise and expand, and that can also connect as many second and third systems as possible via interfaces, which is necessary for the automation of process flows. To be able to cope with such a task, partner companies are needed. Currently, more than 1,200 companies worldwide have an official partnership with ServiceNow and, in addition to services, primarily deliver functional extensions that are made available as a solution in an app store. More than 470 of these apps are available for the two current versions of ServiceNow, Paris and Quebec. To support the widest possible range of processes, there are currently an additional 525 ready-made integration solutions for other products, which are by no means being developed solely for the IT environment. In addition to solutions for business processes such as human resources or customer service, integration solutions already allow access to or management of data in ERP solutions, for example, to enable enterprise customers in the B2B or B2C environment to access order statuses or invoices via a portal. According to Fred Luddy, the founder of ServiceNow: "When I founded ServiceNow in 2004, my vision was to build a cloud-based platform that would enable ordinary people to effectively route tasks through the company. "

ServiceNow pursues a clear strategy in the further development of its solution: Advanced developments of the platform as well as basic functionalities are conducted internally; functional adaptations and industry-specific solutions are either provided by partners or docked to the system via integrators. It goes without saying that separate modules are developed for dedicated processes that affect areas that are decisive for the success of the solution and are offered as a supplement to the platform.

If the functional diversity and the possible fields of application of a workflow platform such as ServiceNow are considered, it quickly becomes clear that basically everything that happens in a company can be mapped in this system. Almost all tasks in a company are regulated in processes or process sequences. And now these procedures or processes are by no means limited to the company, but part of every B2B or B2C connection. This approach, known as case management, and the flexibility to map any case is ServiceNow's commendable forte.

The Servicenow Partner Ecosystem

ServiceNow distinguishes between four different types of partners, depending on the type of service offered to the customer. These are:

- Implementation partner;
- Outsourcing partners or partners that offer managed services;
- Technology partners who develop applications or develop integrators;
- Sales partners.

In addition, companies can be certified as training partners.

A wide range of certifications are possible for the individual functional modules and the technical and organizational activities required in this case to introduce, adapt, and operate the solution. In addition to the different types of partners, companies can also be certified as training partners, and in the U.S. there is also a special certification for companies operating in the public sector.

ServiceNow currently differentiates its partners according to the following classification:

- Specialist;
- Premier;
- Elite;
- Global Elite.

Except for Specialist status, classification into the various partner categories is based on the companies' commitment within the respective partner type. In addition to a wide variety of quality parameters such as type and number of certifications through participation in training measures, evaluation of customer satisfaction and practical experience with the respective modules, commercial indicators such as sales and growth naturally also come into play. The respective partner status then results from this extremely differentiated and complex set of figures. Due to the relatively high barriers to entry and extremely close monitoring by ServiceNow, there are currently six companies in the premium segment, the Global Elite Partners: Accenture, Deloitte, DXC Technology, Ernest & Young, IBM and KPMG. For example, these companies are committed to targeting more than \$1 billion in annual sales.

ServiceNow reviews the efforts and the achievement of goals of the partners annually, and thus, ensures that the respectively reported status also corresponds to the current necessary knowledge and the required delivery quality. Together with the quality score published on ServiceNow's partner page, the partner status is thus, overall, certainly a good indicator of the quality of the services offered and provided by the respective company.

Finding The Right Partner Means Planning Comprehensively

When selecting partners, however, user companies should not neglect one important aspect: Due to the constantly growing functionality and the ever speedily increasing attractiveness also outside of IT, the pure understanding of the technical solution ServiceNow is no longer the only decisive factor for the successful implementation of such a comprehensive system. In addition to the specifics of the industry in which the user operates, an understanding of ServiceNow's integration needs and capabilities with other software architectures is increasingly important, especially when planning an implementation. It is also important to understand the core processes, the personal and cultural conditions as well as the adaptability of a company and to take them into account when planning the new environment.

If ServiceNow's development in terms of filling top positions in addition to the purely technical is considered, the strategy is clear: With Bill McDermott as CEO, ServiceNow is to be established as an information hub and automation solution for all corporate processes, and thus, to take a place in the ranks of the industry giants for corporate applications such as SAP, Salesforce, and Oracle.

ISG added a category of service providers to ServiceNow's partner ecosystem in this study. Due to its capabilities, ServiceNow should be the cornerstone of a company's digitalization strategy. It is, therefore, necessary to integrate this solution into these strategies in order not only to justify the not inconsiderable investments but also to be able to leverage the potential. If this step is neglected or simply ignored, companies are threatened in this case

with the same misfortune that many have already experienced during the introduction of ERP systems. This group of consulting companies defined by ISG, thus, includes companies that can accompany users in their digital transformation by understanding ServiceNow as an integral part of the digital strategy and know how to profitably use the potential of the solution beyond the confines of IT.

In addition to these more strategic planning partners, the companies that have specialized in the implementation and integration of ServiceNow are evaluated, followed by the service providers who offer services related to the operation of an implemented solution. In addition to purely technical skills, all areas assess providers' understanding in the context of service management principles and in the development and operation of process-oriented, industry-specific workflows.

Introduction

Simplified illustration



Source: ISG 2021

Definition

The ServiceNow Ecosystem Partners 2021' study examines the extensive global, yet complex, partner network for one of the leading software solutions for workflow-enabled service management. The high level of acceptance of the ServiceNow product offerings in the user community has ensured exponential growth. To take full advantage of the wide range of functionality, from process (re-)design to software implementation, integration with application management services and training, appropriate professional services are required. Diverse offerings and certification levels indicate the focus of the various partner companies; they range from support throughout the entire life cycle to extremely focused services for extremely specific tasks.

The ISG Provider Lens ServiceNow Ecosystem Partners 2021 study analyses the services and offerings of ServiceNow partners in the U.S., Brazil, and Germany in selected segments. Based on the analysis results, the service providers active in the defined segments can be assessed about the strength of their portfolio and their competitiveness in the market.

Definition (cont.)

The ISG Provider Lens™ study offers IT decision makers:

- Presentation of the strengths and weaknesses of the relevant providers;
- Differentiated positioning of providers based on competitive strength and portfolio attractiveness;
- View of multiple markets including the U.S., Germany, and Brazil.

The study, thus, provides an essential basis for decisions on positioning, relationships, and go-to-market considerations. ISG advisors and corporate customers also use information from these reports to evaluate their current and potential new provider relationships.

Scope of the Report

The ISG Provider Lens ServiceNow Ecosystem Partners 2021 study analyses the services and offerings of ServiceNow partners in the U.S., Brazil, and Germany in selected segments. Based on the analysis results, the service providers active in the defined segments can be assessed about the strength of their portfolio and their competitiveness in the market.

This ISG Provider Lens™ study is based on the life cycle of a ServiceNow-based workflow solution and has been divided into the following three segments:

- ServiceNow Consulting Services, such as services that are necessary before the introduction of a system.
- ServiceNow Implementation & Integration, for example, services that are necessary for the introduction of a solution'
- ServiceNow Managed Services, for example, services that guarantee smooth operation of the solution after the introduction of a solution.

Definition (cont.)

ServiceNow Consulting Services

The framework of this segment examines providers of consulting services that help customers prepare for the deployment of workflow-driven service management. While reference models and assessment methodologies are key to understanding the customer's maturity level and their biggest challenges, for better differentiation, partners also need to have knowledge regarding technical solutions available currently and in the future. Consultants vary in their approach to helping customers understand the transformation projects that are needed to leverage the investments made in ServiceNow. The migration path required for this must be shown accordingly.

The most important evaluation criteria for this segment are:

- Use of reference models and templates;
- Experience with the more comprehensive workflow and service management design;
- Skills in the evaluation of long-term technology developments;
- Know-how about ServiceNow capabilities and other available tools for broader enterprise service management;

- Knowledge of workflows and processes in the enterprise services that are supported by ServiceNow;
- Certifications from standards bodies;
- Experience with the principles of organisational change.

ServiceNow Implementation & Integration Services

Within the scope of this segment, providers with strong specialization in the ServiceNow implementation are analysed. In most companies, ServiceNow solutions are not operated in isolation; therefore, know-how regarding integration with different software tools is a key differentiator. The service providers are expected to make the installation and integration as easy as possible thanks to their experience; however, they should also ensure that the installed solution can be maintained.

The most important evaluation criteria for this segment are:

- Broad technical experience with the tools offered;
- Use of predefined solutions, accelerators, and templates;

Definition (cont.)

- Experience with emerging technologies such as machine learning (ML), natural language processing (NLP) and artificial intelligence (AI) in conjunction with cognitive computing;
- Experience with system, data, and process integration;
- Knowledge of the specifics of enterprise shared services;
- Approach to ensuring the serviceability of the installations.

ServiceNow Managed Services Providers

This quadrant examines service providers who offer managed services within the framework of the provision of the SaaS solution for maintenance tasks and support tasks, including monitoring, remote support, centralised management of the Now-platform and the workflows and applications running on this platform. In case of analysis the various providers in this segment, aspects such as maintenance, data quality management, data security and compliance issues are considered. Owing to the complexity of the workflows to be supported, the providers must address factors such as global coverage and cross-company use in case of provision of services. Service providers are challenged not only to support a highly sophisticated and integrated application landscape, but also to demonstrate how they work in a Multivendor environment or ensure integration.

The most important evaluation criteria for this segment are:

- Experience supporting ServiceNow's Now-platform, workflows, and third-party applications;
- Customer-oriented delivery capability;
- Existing technology partnerships with important software providers;
- Width of the AMS-related (application management services) service portfolio;
- SIAM approach (service integration and management) and delivery models;
- Maturity level of the delivery and contract models;
- Broad client base;
- Local application examples and references.

In addition to the above criteria, the following evaluation criteria apply to all segments:

- Unique selling points;
- Economic stability;
- Market position.

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:

- **Mid Market:** Companies with 100 to 4,999 employees or revenues between US\$20 million and US\$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 US\$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

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.

Leader

The Leaders among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The Product Challengers offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the Leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor's size or weak footprint within the respective target segment.

Market Challenger

Market Challengers are also very competitive, but there is still significant portfolio potential and they clearly fall behind the Leaders. Often, the Market Challengers are established vendors that are somewhat slow to address new trends due to their size and company structure, and therefore have some potential to optimize their portfolio and increase their attractiveness.

Contender

Contenders still lack mature products and services or sufficient depth and breadth in their offering, but also show some strengths and improvement potential in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

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).

Rising Star

Companies that receive the Rising Star award have a promising portfolio 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. This award is only given to vendors or service providers that have made significant progress toward their goals in the last 12 months and are expected to reach the Leader quadrant within the next 12-24 months due to their above-average impact and strength for innovation.

Not In

The service provider or vendor was not included in this quadrant. There might be one or several reasons why this designation is applied: 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 qualify due to market share, revenue, delivery capacity, number of customers or other metrics of scale to be directly compared with other providers in the quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer this service or solution, or confer any other meaning.

ServiceNow Ecosystem Partners - Quadrant Provider Listing 1 of 2

	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
Accenture	● Leader	● Leader	● Not In
agineo	● Rising Star	● Leader	● Leader
Atos	● Not In	● Leader	● Rising Star
Atos (Engage ESM)	● Contender	● Not In	● Not In
Capgemini	● Leader	● Leader	● Leader
Cognizant	● Rising Star	● Leader	● Leader
Computacenter	● Not In	● Not In	● Market Challenger
Deloitte	● Leader	● Product Challenger	● Not in
Devoteam	● Contender	● Contender	● Not In
DXC	● Product Challenger	● Not In	● Not In
Fujitsu	● Product Challenger	● Product Challenger	● Contender
HCL	● Market Challenger	● Leader	● Leader

ServiceNow Ecosystem Partners - Quadrant Provider Listing 2 of 2

	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
Hexaware	● Product Challenger	● Product Challenger	● Not In
Infosys	● Leader	● Leader	● Leader
iTSM Group	● Market Challenger	● Contender	● Not In
KPMG	● Leader	● Leader	● Not In
Orange Business Services	● Contender	● Contender	● Product Challenger
Plat4mation	● Contender	● Contender	● Contender
Sopra Steria	● Product Challenger	● Product Challenger	● Contender
Tech Mahindra	● Contender	● Rising Star	● Leader
T-Systems/OS	● Market Challenger	● Leader	● Leader
Wipro	● Leader	● Market Challenger	● Contender



ServiceNow Ecosystem Partners Quadrants

ENTERPRISE CONTEXT

ServiceNow Consulting Services

In this quadrant report, ISG highlights the current market positioning of providers of ServiceNow consulting services for enterprises in Germany and how each provider addresses the key challenges faced in the country. ISG defines the current positioning of these providers, with a comprehensive overview of the competitive landscape of the market in Germany.

Germany based enterprises are accelerating their digital transformation and there is a wide acceptance of the ServiceNow platform across several industries. Enterprises seek ServiceNow consulting service providers that can support them in converting their digital strategy into reality by using modern technologies. Among enterprises in Germany, trust and mutual knowledge plays a major role in choosing a consulting service provider.

Enterprises also require service providers that can act in a more comprehensive way by being problem solvers rather than being just solution providers. To achieve this, a service provider must identify the exact requirements and issues faced by enterprises. Many enterprises opt for service providers with a considerable number of references, which is a reflection of their problem solving capabilities.

This report is relevant for:

Germany based enterprises of all sizes and across industries, evaluating the providers offering consulting services for ServiceNow

Project leaders who are responsible for soliciting consulting for ServiceNow with the aim to understand the differentiators among the leading ServiceNow consulting service providers in Germany

All C-level executives and business leaders who recognize ServiceNow as a cornerstone of their digitalization strategy, and are trying to evaluate the ServiceNow consulting capabilities of service providers to identify the ones that best fit their requirements.

SERVICENOW CONSULTING SERVICES

Definition

Within the scope of this segment, providers of consulting services who support customers in preparing for the use of workflow-controlled Service Management are examined. While reference models and assessments are key to understanding customer maturity and key challenges, a comprehensive understanding of the current and future technical capabilities of partners helps in differentiation. Consultants are positioned differently when it comes to communicating to customers the transformation efforts required to truly leverage the investments, they have made in ServiceNow, and to demonstrate a robust migration path.

The most important evaluation criteria for this segment, in addition to knowledge regarding the performance of the ServiceNow product offering, are the integration capability as well as the long-term development of the service spectrum.

ServiceNow Ecosystem Partners
ServiceNow Consulting Services

2021
Germany



Source: ISG Research 2021

SERVICENOW CONSULTING SERVICES

Eligibility Criteria

- Use of reference models and templates;
- Experience with the more comprehensive workflow and service management design;
- Options for forecasting long-term technology developments;
- Know-how about ServiceNow capabilities and other available tools for broader enterprise service management;
- Knowledge of workflows and processes in the enterprise services that are supported by ServiceNow;
- Certifications from standard bodies;
- Experience with the principles of organizational change.

Observations

In general, it can be stated that in the consulting market for ServiceNow in Germany, the differences between the individual companies are extremely marginal. While the smaller, local companies specializing in ServiceNow can score points with great expertise and their proximity to customers, both geographically and culturally, the large IT service providers are all able to meet customer requirements thanks to their extensive market knowledge and industry-specific experience, solutions, and services.

- As a transformation partner with a high level of technology expertise, **Accenture** provides the ideal bridge between evolving business requirements and technological change. The extensive ServiceNow experience ideally complements the process competence and change competence.
- **Capgemini's** many years of experience with ServiceNow and its practical knowledge make it an ideal planning partner that can guarantee practical implementation of theoretical plans.
- **Deloitte** sees ServiceNow to accelerate the digital transformation of companies and underpin it with a company-wide service philosophy.

SERVICENOW CONSULTING SERVICES

Observations (cont.)

- **Infosys** is positioning ServiceNow as an overarching data ecosystem for digitalisation of processes within the framework of a digitalisation strategy. Thus, ServiceNow implementations like ESM Café are positioned as a central process system.
- **KPMG** defines ServiceNow as the foundation for a company strategy that creates new ways for users to interact with business services. In this way, the management consultancy supports customers in digital change.
- **Wipro's** great strength is its many years of experience, and it offers viable solutions are developed for the customer that enable the transformation towards service-oriented service delivery.
- **agineo** is the Rising Star among prominent consulting companies. As a company completely focused on ServiceNow, agineo scores with extensive, practical knowledge. As a result, this provider delivers high-quality planning results.
- **Cognizant's** hands-on experience as an IT service provider and as a user of ServiceNow solutions allows the company, which is positioned as a Rising Star, to plan viable and future-proof solutions.

RISING STAR: AGINEO

Overview

Founded in 1986 as ComConsult Kommunikationstechnik GmbH, the company has been part of the Materna Group for five years under the brand name agineo. More than 120 consultants specialising in ServiceNow in nine local offices are available for German customers. With its many years of extensive experience with ServiceNow and with consulting on all aspects of ITSM, agineo has built up many long-term customer relationships. The company knows and masters all available ServiceNow modules and helps customers with the implementation of ITSM, ITOM SecOps, HR and customer service solutions. As one of the largest German ServiceNow providers, the company offers process consulting support through architecture design support, SaaS implementations and tasks in the operation of complex solutions.

Strengths

Established company with local advantages. The company, which provides strategic advice exclusively from its local locations, is known in the German market for its customer focus and high-quality project results. This also shows the high level of customer satisfaction.

Cross-industry references attest to the knowledge within the company. agineo's impressive reference list includes companies from a wide range of industries such as financial institutions, leading sports equipment manufacturers, automotive manufacturers, public sector organisations and others.

Many years of experience is one of agineo's great strengths. More than two-thirds of the company's 150-plus employees are certified in the Professional, Senior and Master categories. More than half of the employees can look back on more than six years of experience in ServiceNow Consulting.

Solution supplier with own developments. As a technology partner of ServiceNow, agineo provides consulting services as well as proprietary Apps that are specially adapted to the conditions of the German market. This ability helps, particularly when planning complex installations, to quickly identify missing functionalities and to provide solutions for them.

Caution

External presentation as an integration specialist. Particularly for large mid-tier companies and major customers whose headquarters may not be in Germany, the industry knowledge available in the Materna Group must be presented more clearly. The competencies of agineo as an implementation partner of the IT are not denied, but in the business areas the concentrated process and industry knowledge of the whole group must come into play.

More certifications outside of the core IT topics. Although agineo is of a considerable size, it is necessary to quickly implement the already defined strategy in personnel development. IT and business are moving closer together and the requirements for a strategic ServiceNow introduction require that agineo demonstrably has great competencies outside of classic IT topics.



2021 ISG Provider Lens™ Rising Star

agineo is a competent partner for planning complex ServiceNow implementations for companies of all sizes.

ENTERPRISE CONTEXT

ServiceNow Implementation & Integration Services

In this quadrant report, ISG highlights the current market positioning of providers of ServiceNow implementation and integration services for enterprises in Germany, and how each provider addresses the key challenges faced in the country. ISG defines the current positioning of these providers, with a comprehensive overview of the competitive landscape of the market in Germany.

In Germany, enterprises are looking for providers of ServiceNow implementation and integration services that have broad knowledge about platform application programming interfaces (APIs) and integration tools for integrating resources both within and outside enterprises. Apart from that, enterprises are also seeking service providers that have strong governance skills to ensure that implementation and integration projects are well executed with collaborative interactions and feedbacks. Enterprises prefer service providers that can deliver on its promises with proven delivery methodology and agility.

Also, Germany based enterprises seek service providers that have local delivery centers. For seamless implementation and integration, enterprises prefer a local point of contact with German-language support and knowledge about the regulatory and legal requirements in Germany.

This report is relevant for:

German enterprises of all sizes and across industries that are evaluating providers offering implementation and integration services for ServiceNow.

Project leaders who are responsible for implementation and integration of ServiceNow to enable them to understand the differentiators among the leading providers in this space in Germany.

All C-level executives and business leaders who recognize ServiceNow as a cornerstone of their digitalization strategy, and are evaluating the providers of ServiceNow implementation and integration identify the ones that best fits their requirements.

SERVICENOW IMPLEMENTATION & INTEGRATION SERVICES

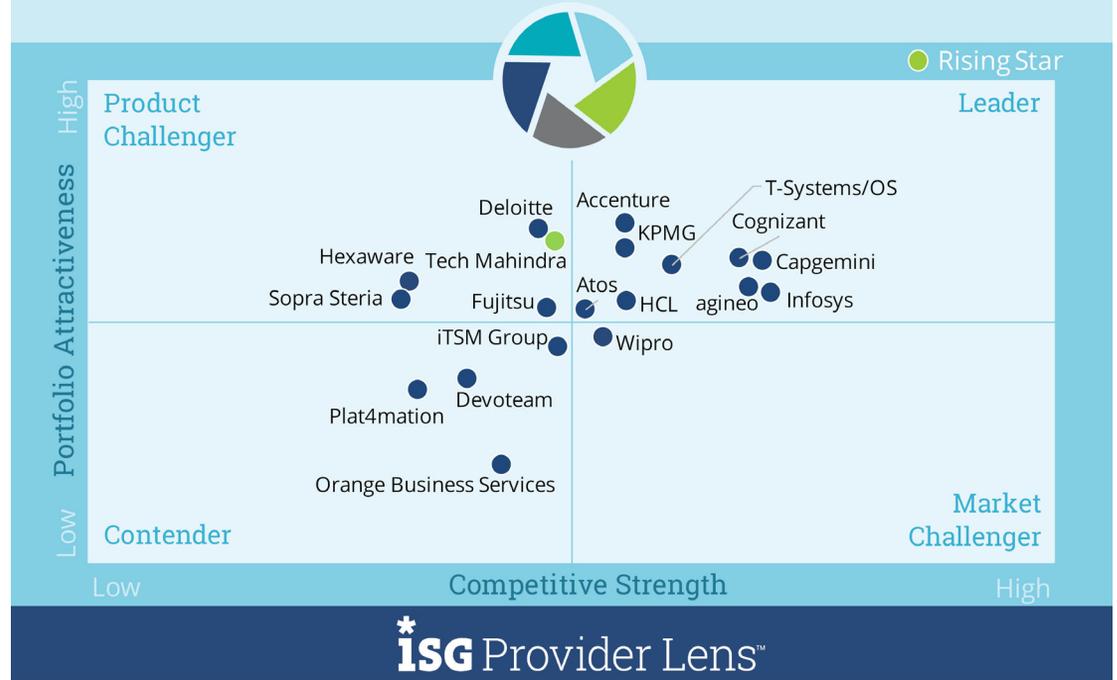
Definition

Within the scope of this segment, providers with strong specialization in the ServiceNow implementation are analysed. In most companies, ServiceNow solutions are not operated in isolation; therefore, know-how regarding integration with different software tools is a key differentiator. Service providers are expected to ensure that installations and integrations run as smoothly as possible thanks to their experience, and that the ServiceNow solutions provided can be operated in such a way that potential problems that could arise due to the high number of version upgrades do not affect ongoing operations.

During installation, it is also important to be able to enable the future user or operator of a solution to be able to fulfill his obligations and tasks after commissioning. The necessary knowledge transfer must be part of the implementation skills of the provider.

ServiceNow Ecosystem Partners
ServiceNow Implementation and Integration Services

2021
Germany



Source: ISG Research 2021

SERVICENOW IMPLEMENTATION & INTEGRATION SERVICES

Eligibility Criteria

- Broad technical experience with the tools offered;
- Use of predefined solutions, accelerators, and templates;
- Experience with emerging technologies such as machine learning (ML), natural language processing (NLP) and artificial intelligence (AI) in conjunction with cognitive computing;
- Experience with system, data, and process integration;
- Knowledge of the specifics of enterprise shared services
- Approach to ensure maintainability of installations.

Observations

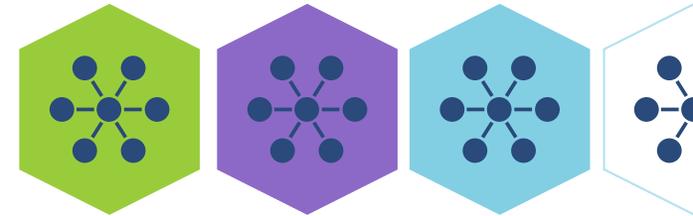
Almost all the companies considered in this quadrant have many years of experience with satisfied customers, leading to a very high level of performance and only minor differences in quality. In principle, all companies involved deliver excellent results in the implementation and integration of ServiceNow. There are only differences in experience with other management systems, which users must consider when choosing a suitable partner.

- **Accenture**, as one of six Global Elite Partners of ServiceNow, establishes the solution as a focal point for all process flows and data to provide a company-wide service catalogue.
- **agineos'** implementation and integration projects generally deliver a very high level of customer satisfaction. The strong local presence and absolute focus on ServiceNow justify the leading position in the market.
- **Atos** provides a comprehensive range of implementation services through its subsidiary Engage ESM, which is set up as a CoE. This means that a wide variety of customer situations can be dealt with flexibly.
- **Capgemini** offers both extensive domain knowledge and extensive process knowledge. This is the basis for successful implementation and integration projects.

SERVICENOW IMPLEMENTATION & INTEGRATION SERVICES

Observations (cont.)

- **Cognizant** understands how to leverage agile project methodologies to deliver ServiceNow implementations quickly, yet with high quality.
- **HCL** provides ready-made solutions that ensure a quick yet high-quality implementation. Broad technological knowledge also guarantees extensive integration options.
- **Infosys** has significantly strengthened its leadership in the implementation of ServiceNow solutions with the acquisition of GuideVision, which was completed in October 2020.
- **KPMG** uses its practical experience from many successful implementations to ensure the success of projects before "go-live" by using test routines developed in-house.
- **T-Systems/OS** combines local presence with extensive experience and a great understanding of technology, and thus, guarantees the success of even the most complex integration projects.
- **Tech Mahindra** is the Rising Star in this quadrant due to high ServiceNow expertise, pre-built integration packages as well as a large, local commitment.



AGINEO

Overview

ComConsult Kommunikationstechnik GmbH was founded in 1986 and became part of the Materna Group in 2017, and the brand name agineo emerged from this. The purely ServiceNow-based service offering is now provided by over 120 ServiceNow-specialized consultants for German customers from nine local offices. Services account for more than 90% of the sales generated in 2020 amounting to more than €15 million. As a long-term partner of ServiceNow, agineo offers all the necessary services at present. The company supports all ServiceNow module offerings and helps customers in the implementation ITSM, ITOM SecOps, HR and customer service solutions.

Strengths

Complete implementation teams are a guarantee of success. A team of project managers, architects, and consultants as well as developers and administrators accompany the implementation of ServiceNow. As an authorized training partner of ServiceNow, agineo provides many certified trainers to complete the teams.

High customer satisfaction and many references prove the quality of the implementations. With a CSAT score of 4.9 out of 5, agineo's customers demonstrate their satisfaction. The impressive reference list includes financial institutions, leading sports equipment manufacturers, automotive manufacturers, public sector organizations and customers in other industries.

Large investment in the development of new employees ensures long-term partnerships. With the agineo academy, the company operates its own training area in which new employees are qualified for their work. Every graduate of this academy holds at least an ITIL Foundation certification, the title of a Professional Scrum Master and ServiceNow certifications as a system administrator and as an ITSM implementation specialist, as well as an additional certification depending on the chosen area of deployment.

Caution

The total offering of the parent company must be included. As a stand-alone company, agineo will not be able to defend its leading position in the race for company-wide service management solutions in the medium term. The existing know-how will no longer be sufficient in the future without the skills of the parent company. A clear strategy is necessary in this case to convince new customers through the interlinking of skills. The independence shown appears increasingly untrustworthy in larger projects that also involve transformations and possibly ignores market developments.



2021 ISG Provider Lens™ Leader

As a partner for the implementation of ServiceNow solutions, agineo offers a tailor-made offer for customers of all sizes.

ENTERPRISE CONTEXT

ServiceNow Managed Services Providers

In this quadrant report, ISG highlights the current market positioning of providers of ServiceNow managed services for enterprises in Germany, and how each provider addresses the key challenges faced in the region. ISG defines the current positioning of these providers, with a comprehensive overview of the competitive landscape of the market in Germany.

Technical expertise is a major factor Germany based enterprises look for while choosing a managed service provider for ServiceNow. These enterprises value the presence of certified and experienced ServiceNow specialists in the managed service provider's company, along with domain expertise and experience across the ServiceNow platform. Another major factor enterprises considered by enterprises is the service to cost ratio — often managed service providers use this factor to differentiate their services when it is difficult to establish any other kind of differentiation.

Enterprises often seek managed service providers with a considerable number of references as it helps to assess the maturity of a service providers and its service delivery capabilities. For service providers, these references plays a major role in building brand trust.

This report is relevant for:

Germany based enterprises of all sizes and across industries evaluating providers of managed services for ServiceNow.

Project leaders who are responsible for managed services of ServiceNow, to enable them to understand the differentiators among the leading providers of managed services for ServiceNow in Germany.

All C-level executives and business leaders who recognize ServiceNow as a cornerstone of their digitalization strategy, and are seeking to evaluate the capabilities of providers of managed services for ServiceNow to identify the ones that best fits their requirements.

SERVICENOW MANAGED SERVICES PROVIDERS

Definition

This quadrant examines service providers who offer managed services for maintenance and support tasks, including monitoring, remote support, centralized management of the Now platform and the workflows and applications running on this platform. In case of analysis the various providers in this segment, aspects such as maintenance, data quality management, data security and compliance issues are considered. Owing to the complexity of the workflows to be supported, the providers must address factors such as global coverage and cross-company use in case of provision of services. Service providers are challenged not only to support a highly sophisticated and integrated application landscape, but also to demonstrate how they work in a multivendor environment or ensure integration.

ServiceNow Ecosystem Partners
ServiceNow Managed Services Providers

2021
Germany



Source: ISG Research 2021

SERVICENOW MANAGED SERVICES PROVIDERS

Eligibility Criteria

- Experience supporting ServiceNow's Now-platform, workflows, and third-party applications;
- Customer proximity and ability to deliver;
- Existing technology partnerships with important software providers;
- Width of the AMS-related (application management services) s portfolio;
- SIAM approach (service integration and management) and delivery models;
- Maturity level of the delivery and contract models;
- Existing customer base;
- Local application examples and references.

Observations

The service area around the application services for ServiceNow is clearly dominated by international IT service providers with a wealth of experience and a pronounced local presence. Since all companies, except for T-Systems, base their services on the ServiceNow Cloud operated by the manufacturer, the differences in this quadrant are negligible. Above all, all offshore providers with many years of experience in dealing with rapidly changing technology and increasing customer demands can score points. The resulting service offerings go far beyond classic application management and help customers to maximize the benefits of ServiceNow installations. At the same time, users of the systems are given completely new options for using company services.

- **Capgemini** is present in the market as a service partner and managed service provider for ServiceNow solutions, and thus, offers customers the greatest possible flexibility. The range of services guarantees high quality based on, among other things, our own experience as a user.
- **Cognizant** consolidates its leadership by quickly adapting the range of services to changing customer requirements. Global delivery models are supported by a local presence.

SERVICENOW MANAGED SERVICES PROVIDERS

Observations (cont.)

- In addition to a strong local presence, **HCL** demonstrates its customer orientation above all through different financing models that are very attractive to customers and, for example, do not affect their liquidity.
- **Infosys** clearly has its strengths where it comes to extending ServiceNow with additional functionalities. The in-house development ESM Café, which is based on ServiceNow, has many such extensions.
- **agineo** is an established player as a managed service provider in Germany. Many years of experience in application operations and a local presence paired with extensive ServiceNow knowledge result in a leading position in this quadrant.
- **Tech Mahindra** offers extensive and stable services for ServiceNow environments with many proprietary developments. In addition, customers are continuously supported in the modernisation of processes by means of transfer of the processes to ServiceNow instances.
- **T-Systems/OS** is the only company which can deliver ServiceNow services from its own infrastructure. In addition to the full range of application and operating services, customer proximity is another big plus.
- **Atos** combines its long experience in application operations with the additional ServiceNow competencies of Engage ESM acquired through the acquisition, earning it the position of a Rising Star in this quadrant.

AGINEO

Overview

The managed services offering is provided by agineo in cooperation with the parent company Materna. As an application service provider, Materna has been operating its own data centers since 2000, from which application services are made available. The experience gathered here over the years is also available to ServiceNow customers in the provision of services. As a full-service provider with explicit know-how about the leading ESM products, via the subsidiary agineo for the ServiceNow environments in this case, the companies together offer graduated, coherent service packages in managed services.

Strengths

Classic application management is the basis. Materna's experience for the secure and highly available provision of applications used by the customer comes into play when using ServiceNow workflows and applications, with agineo contributing a high level of expertise due to its long-standing and distinctive partnership with ServiceNow. In addition to the classic operational topics, customers can also request a team of experts to support all common activities of the respective ITSM processes (incident, change, problem) or to take them on independently.

Managed services and full managed services. The technical services of agineo include keeping the ServiceNow instances up to the latest technical release status. The application and the architecture are optimized at the same time. Agineo takes over the monitoring of the instances as well as the management of the interfaces.

Materna's great expertise in IT service management solutions enables cross-system management. Thanks to the Materna-agineo connection, managed services can be offered in complex and heterogeneous landscapes. For example, products from BMC or Micro Focus can be operated in Materna's own data centers connected to a ServiceNow instance.

Caution

In case of ServiceNow managed services in particular, the separation of duties between Materna and the subsidiary agineo is becoming blurred. A clearer illustration of the relationship between the two companies provides clarification in this case. For example, Materna has a lot of ServiceNow knowledge, but at the same time agineo is proclaimed as the ServiceNow CoE.



2021 ISG Provider Lens™ Leader

Many years of experience both in the ServiceNow environment and as an application service provider make the agineo and Materna combination a market leader in this segment in Germany.

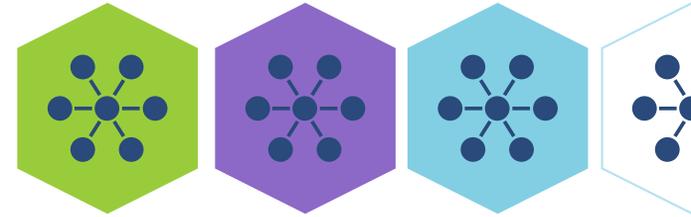


Methodology

METHODOLOGY

The research study “ISG Provider Lens™ ServiceNow Ecosystem Partners 2021” analyzes the relevant software vendors/service providers in the German market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology. The study was divided into the following steps:

1. Definition of 2021 ISG Provider Lens™ ServiceNow Ecosystem Partners 2021 market.
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics.
3. Interactive discussions with service providers/vendors on capabilities and use cases.
4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable).
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
 - Strategy & vision
 - Innovation
 - Brand awareness and presence in the market
 - Sales and partner landscape
 - Breadth and depth of portfolio of services offered
 - Technology advancements



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Senior Analyst

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ISG Provider Lens™ | Quadrant Report

April 2021

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