

ServiceNow Ecosystem Partners

ServiceNow Consulting Services

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

Customized report courtesy of:



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ServiceNow: Redefining digital workflows

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

In 2023, ServiceNow unveiled the highly anticipated Vancouver release, with several new features and capabilities that revolutionize digital workflows and enhance user experiences.

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

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

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



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

Internationalization driving the European ServiceNow market

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

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

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

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

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

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

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

ServiceNow advancements and developments in the past 12 months

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



Executive Summary

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

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

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

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

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

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

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





Provider Positioning

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





Provider Positioning

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





Provider Positioning

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





Provider Positioning

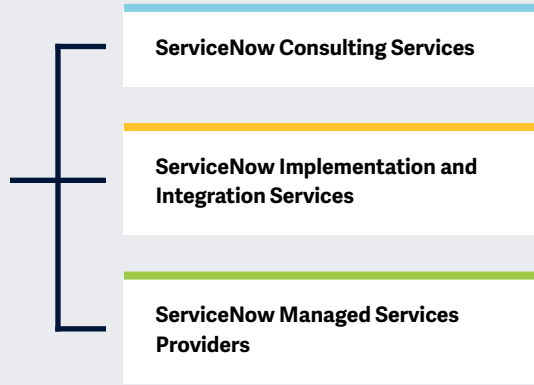
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	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
Tietoevry	Product Challenger	Rising Star ★	Rising Star ★
T-Systems/OS	Leader	Leader	Leader
Unisys	Not In	Contender	Not In
Wipro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



Key focus areas for ServiceNow Ecosystem Partners.

Simplified Illustration; Source: ISG 2024



Definition

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

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

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

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

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

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



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

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



Scope of the Report

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

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

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

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

Provider Classifications

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

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

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

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

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





Provider Classifications: Quadrant Key

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

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

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

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

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

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





ServiceNow Consulting Services

Who Should Read This Section

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

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

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



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



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



Digital transformation professionals should read this report to know how service providers design ServiceNow solutions and map respective technologies.

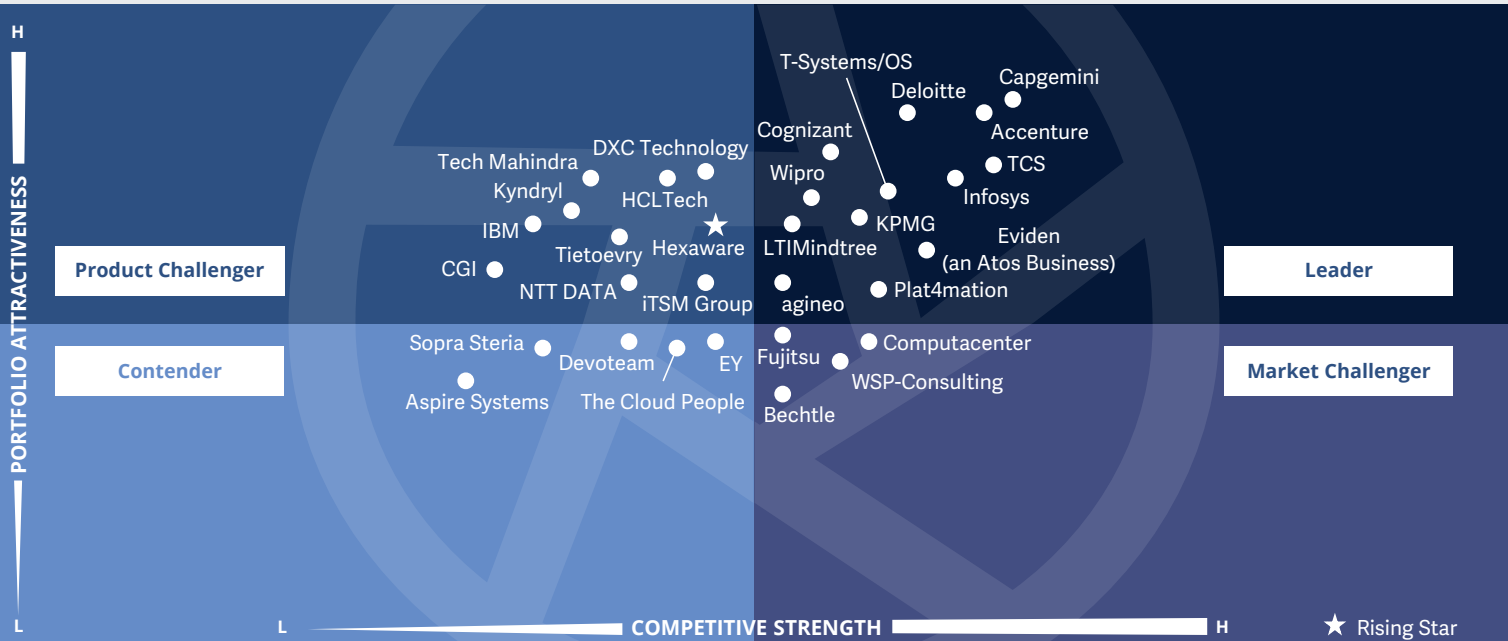


Technology professionals should read this report to learn about industry-specific solutions and the providers' prowess in conducting consulting assignments for various industries.



**ServiceNow Ecosystem Partners
ServiceNow Consulting Services**

Europe 2024



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

Ashwin Gaidhani



Definition

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

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

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

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

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

Eligibility Criteria

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

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



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



Observations

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

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

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

ServiceNow focuses on ESG and sustainability:

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

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

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

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

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

accenture

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



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



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



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

Deloitte.

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

EVIDEN

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



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



ServiceNow Consulting Services



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



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



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



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



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



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



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



agineo



“agineo is a strong ServiceNow partner in the European market, merging strategic and process consulting expertise with technical implementation skills.”

Ashwin Gaidhani

Overview

agineo is headquartered in Aachen, Germany. The company was founded in 1986 and was taken over by the Materna Group in 2017. It offers advisory services to clients across the private and public sectors with 150 consultants specializing in ITSM, ITOM security operations (SecOps), HR and customer service solutions. agineo and ServiceNow intelligently simplify various business processes by making them more transparent and efficient. The company offers consulting services for enterprise service management and optimizes business processes digitally. It leverages the ServiceNow cloud platform to streamline processes and achieve business outcomes.

Strengths

Comprehensive and customized consulting services:

agineo offers a range of solutions developed in-house on the ServiceNow platform. These solutions are paired with the holistic consulting practice to guide enterprise clients through standard and custom functionalities. The process starts with the analysis phase to help gauge customer requirements, their challenges and measures to address them using ServiceNow. agineo then compares these requirements with standard functionalities to design high-quality, low-effort and easily upgradeable solutions.

Seamless digital transformation: agineo’s consulting services for enterprise service management help optimize business processes digitally. It leverages the


ServiceNow cloud platform to streamline various processes and attain business goals. agineo has established various design thinking methods to overcome the challenges faced when combining various engineering requirements and functionalities to achieve improved UX. It conforms to best practices, methodologies and standards and the ServiceNow state model when defining processes to drive the clients’ digital transformation journeys seamlessly.

Launch of ServOps offering: agineo has broadened its portfolio by introducing a standard ServOps offering for ServiceNow ITSM and ITOM. It includes licenses and gives organizations visibility across their IT infrastructure.

Caution

agineo’s transition toward a more unified and consultative approach in DACH marks a promising trajectory. However, the success of this transformation is contingent upon the successful implementation of its strategies across various European markets.





Star of Excellence

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



Appendix

The ISG Provider Lens 2024 – ServiceNow Ecosystem Partners study analyzes the relevant software vendors/service providers in the Europe market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of March 2024, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

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



Author & Editor Biographies



Lead Analyst

Ashwin Gaidhani
Research Partner

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

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



Research Analyst

Arjun Das
Research Specialist

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

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





Study Sponser

Aman Munglani
Director and Principal Analyst

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

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



IPL Product Owner

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

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

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



*ISG Provider Lens™

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