IDC MarketScape

IDC MarketScape: Worldwide ServiceNow Implementation Services 2026 Vendor Assessment

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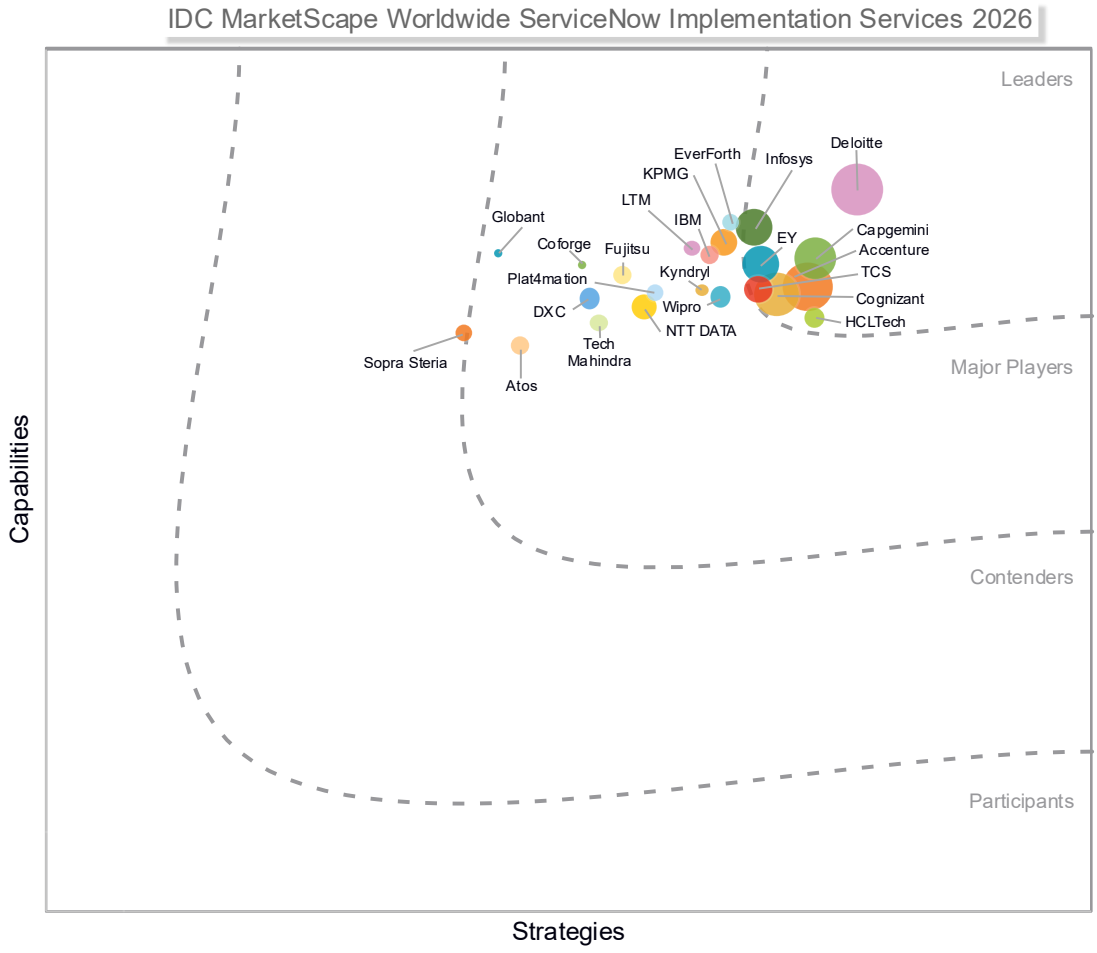
THIS EXCERPT FEATURES EY AS A LEADER
IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape worldwide ServiceNow implementation services vendor assessment



Source: IDC, 2026

August 2026, IDC #US54126726e

Please see the appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide ServiceNow Implementation Services 2026 Vendor Assessment (Doc # US54126726).

IDC OPINION

ServiceNow has established itself as a platform in the IT service management (ITSM) landscape and has increasingly found applications in areas such as employee management, operations, and customer engagement. Nearly one in five organizations worldwide has adopted ServiceNow. This is according to IDC's *System Integration Professional Services Survey* (July 2025), which indicates that 64% of organizations are on the ServiceNow adoption journey. Another 18% are working to procure funding for their deployment. ServiceNow's prominence in the enterprise IT landscape relates to technology priorities, including the IT security of data and systems, AI-enabled business process automation, and IT operations management. Today, with solutions such as AI Agent Orchestrator, Context Engine, Workflow Data Fabric, and AI Control Tower, ServiceNow is further establishing its relevance across organizations as an enabler for AI and agentic solutions. The platform positions itself as the AI control tower for business reinvention. Service providers will play a critical role in enabling organizations to adopt and make the most of these solutions.

This IDC MarketScape evaluated 23 service providers that met the inclusion criteria, including consultancies, global systems integrators, ServiceNow-native specialists, and regional specialists, each bringing unique value propositions to the ServiceNow implementation services landscape. What separates providers is strategic alignment and the breadth of capabilities within the ServiceNow platform, not the size of the parent organization.

The evaluation reveals a market in which capabilities have largely been demonstrated, with greater convergence across the axis measuring performance that has been delivered and validated by clients. Core ServiceNow implementation has matured into a broadly comparable competency among many providers. Vendors have established repeatable expertise in standing up the platform, executing delivery, and covering the functional footprint, indicated by relatively higher client satisfaction measures. However, the strategy axis presents a measure of separation. The widest dispersion is observed for the forward-looking strategy criteria and go-to-market criteria (e.g., marketing strategy, sales and distribution, portfolio strategy, and innovation and R&D strategy), together with growth strategy and functionality or offering strategy. The question has shifted from whether a provider can implement ServiceNow to where a provider is taking ServiceNow next and

whether it can fund, build, and take that direction to market. This can mean which parts of the CRM, security and risk, employee, and AI governance footprint it is investing in, how deliberately it is growing and investing in the practice, and how effectively it is driving end-user adoption. Because ServiceNow itself is expanding into AI orchestration and governance and into adjacent workflow domains, the strategic bets that distinguish providers are aligned with that direction.

As ServiceNow advances agentic delivery, prebuilt specialists, and faster autonomous setup, the routine build-and-configure work that underpins today's capability parity will compress. The value of an implementation partner will shift further toward advisory, governance design, operating model change, and outcome realization. The providers that convert broadly comparable delivery capability into differentiated, governed, and outcomes-based offerings will be best positioned for the coming period. Those treating ServiceNow implementation as a mature and static competency face the greatest exposure to commoditization as the platform moves toward AI orchestration.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This IDC MarketScape includes providers that offer ServiceNow implementation services. It does not offer an exhaustive list of all the players in the worldwide ServiceNow implementation SP ecosystem. IDC considered more than 30 vendors worldwide for inclusion in this IDC MarketScape. Subsequently, we narrowed down the field of players and collected and analyzed data on 23 service providers that met our inclusion criteria.

For inclusion in this IDC MarketScape, vendors had to meet two criteria:

- **Headcount:** Have more than 200 certified experts according to the ServiceNow partner portal
- **Revenue:** Have more than $200 million in annualized revenue in IT consulting and systems integration services as per IDC Services Tracker OR more than $100 million in ServiceNow-related professional and/or managed services.

Vendors that partially met IDC's criteria are noted in the Vendors to Watch section of this IDC MarketScape.

ADVICE FOR TECHNOLOGY BUYERS

Based on its ongoing coverage of ServiceNow, IDC recommends that buyers consider the following before scoping a new ServiceNow implementation or selecting an implementation partner:

- **Broaden how ServiceNow and its implementation scope are evaluated:** ServiceNow no longer competes solely in ITSM or workflow automation. It has

extended its platform into CRM, security and risk, employee experience, finance and procurement (Core Business Suite), app development, and cross-cloud AI governance. Organizations that scope implementation RFPs around a single legacy category (e.g., "ITSM replacement") risk underestimating both the platform's strategic footprint and the breadth of expertise an implementation partner needs. Buyers should build cross-functional stakeholder teams (e.g., IT, HR, security, customer service, and finance) into implementation planning from the outset.

- **Bring CISOs into partner selection to plan for identity and security governance:** With the Armis and Veza acquisitions (integrated into Autonomous Security and Risk/AI Control Tower's "Secure" dimension), ServiceNow is positioning AI-agent identity, access, and audit trails as a core implementation consideration rather than a downstream security review. CISOs and risk officers should be included in ServiceNow security architecture discussions before vendor and partner selection to ensure the implementation meets security, risk, and compliance requirements.
- **Weight change management as heavily as technical configuration when selecting an implementation partner:** IDC's review of ServiceNow implementations consistently found that workforce adoption, not platform capability, is a significant implementation risk. As ServiceNow rolls out its unified AI experience (Otto, built on Now Assist, AI Experience, and the acquired Moveworks conversational AI platform) through EmployeeWorks and other products, buyers should budget explicitly for training, communication, and workflow redesign; they should ground agentic workflow design in the operational realities of the employees who will use it, not solely in IT architecture.
- **Favor AI agent interoperability over consolidation lock-in when selecting an implementation partner:** ServiceNow's Action Fabric (a set of managed APIs, MCP servers, and governed endpoints) and its support for the Agent2Agent (A2A) and Model Context Protocol (MCP) standards allow enterprises to retain investments in multiple AI providers while routing governed execution through ServiceNow. Buyers should confirm with prospective implementation partners that governance and auditability remain consistent across whichever mix of third-party agents and models they plan to run in production before committing to multiyear consolidation deals.
- **Reassess what "implementation" partners are being hired to do:** The extensibility of the ServiceNow platform enables customers to redefine workflows and business processes. At the same time, many ServiceNow customers have learned that customizations create complexity and technical debt, and many customers are returning to baseline or out-of-the-box configurations. Buyers should select implementation partners that match their technical and functional requirements. Some buyers may want to consider partners that have shifted their value proposition toward advisory services, governance design, operating model redesign, business

process transformation, and outcome realization, while others may want to consider partners focused on configuration and integration labor.

- **Match the scale of the engagement to the size of the organization:** ServiceNow's 2026 packaging changes (including the entry-level ITSM Foundation and ESM Foundation packages), aimed at midsize organizations, signal that not every buyer needs (or should pay for) a full enterprise-grade, multiyear transformation program. Midsize and smaller organizations should ask prospective partners directly whether a lighter, faster-to-value package and delivery model fits their needs before defaulting to the same scope used for large enterprise deployments.
- **Evaluate vendors and partners together, not as separate decisions**. The line between "buying from ServiceNow" and "buying implementation services" is becoming more blurred, as ServiceNow's own delivery organization (Impact and Expert Services) increasingly subcontracts through partners. Buyers should use RFPs and contract negotiations to clarify up front which work will be delivered by ServiceNow and/or by partners, and how governance and accountability of the implementation engagement will be maintained across that mix.
- **Recognize that scale is important, but providers of all sizes can offer value:** Numerous service providers can implement ServiceNow solutions. This IDC MarketScape assesses 23 providers, but many others may be suitable for an organization's specific needs, depending on the industry and/or regions in which it operates. IDC advises prospective customers to prioritize their requirements and consider several (or more) providers of varying sizes that can meet their needs in terms of service delivery, growth potential, relationship management, and cost constraints. Find the right provider that fits your requirements and culture. Refer to the Vendors to Watch section for a list of eight additional vendors to consider when procuring ServiceNow professional services.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and opportunities.

EY

Based on IDC analysis and buyer perception, EY is positioned in the Leaders category in this 2026 IDC MarketScape for worldwide ServiceNow implementation services.

EY is a global professional services organization headquartered in London, operating across assurance, consulting, tax, strategy, and transactions. Its ServiceNow value

proposition centers on orchestrating connected, governed, AI-enabled ecosystems and human-led agentic workforces for enterprise clients. The practice is anchored in EY's regulated brand identities in risk, compliance, security, tax, finance, and sustainability. This is demonstrated by its portfolio of ServiceNow assets, including IRM+, the EY Third Party Risk Management Accelerator, the Financial Services Reg Manager, AI governance and compliance, and fraud operations. Building on this regulated-industry focus, the practice has been materially shaped by two ServiceNow-specific acquisitions — Whyaye in 2023 and Red Moki. EY co-develops with ServiceNow product teams through the WinLabs construct, including the Industrial Connected Workforce solution that originated at EY and now underpins ServiceNow's IT/OT strategy. Its vision is to lead business transformation by combining sector-led advisory, platform-led execution, and AI-led delivery, embedding ServiceNow as the orchestration layer across multi-tech client estates.

EY operates as a member firm network providing services in more than 150 countries and territories, with a workforce exceeding 400,000. It uses a multidisciplinary delivery model combining sector specialists, technology consultants, change practitioners, and tax and finance professionals. Industry coverage encompasses financial services, life sciences, consumer products, technology, telecommunications, retail, the public sector, energy, and insurance.

The ServiceNow practice sits inside EY's technology consulting service line and operates as a global alliance with regional core delivery practices in the US, Canada, UKI, EU West, LATAM, and Oceania, plus a Global Delivery Services (GDS) core. The practice is activated in 39 countries and supported by GDS hubs in India, Poland, Mexico, Spain, and the Philippines. It comprises more than 2,000 dedicated practitioners across the Americas, EMEA, and APAC, structured around workflow-aligned competencies and industry-aligned offerings that cover EY's eight ServiceNow priority sectors (technology, telecommunications, banking, consumer goods, life sciences, retail, federal government, and insurance). Whyaye and Red Moki expand the capacity in UKI and Oceania, adding upward of 200 ServiceNow specialists; GDS expansion has scaled offshore and nearshore delivery.

EY's catalog spans the full life cycle; it offers advisory, custom application development, managed services, and training services across ITSM, ITOM, ITAM, SPM, HRSD, CSM, financial services operations, GRC, TPRM, SecOps, App Engine, and Now Assist. The practice holds over 4,800 mainline ServiceNow certifications (~13,170 including micro-certifications), 8 CMAs, and 50 CTAs. Proprietary IP includes EYes (code-quality automation), EYQA (delivery quality), the ITSM and HRSD Blueprints, IRM+, the TPRM Accelerator, the SAM Platform with Tanium, the Industrial Connected Workforce, Next Wave GBS, the Financial Services Reg Manager, and AI Governance and Compliance. The practice has 18 offerings on the ServiceNow Store and runs 50 Wavespace centers and 9 AI labs.

The practice deploys Now Assist across ITSM, CSM, HRSD, SecOps, and CMDB, and has built Ai4Delivery, a preconfigured ServiceNow accelerator of AI agents that automate SDLC tasks across business analyst, scrum master, developer, tester, and project team personas. Additional tooling includes Now Assist Skill Kit, Agentic AI Studio, AI Control Tower, AMS.AI, and a RAG utility for ServiceNow configuration. The AI approach is governed by EY's Responsible AI Framework and integrated with EY.ai and EY fabric. WinLabs is the structural mechanism for joint innovation with ServiceNow, scaling agentic AI use cases and reinforcing its orchestration-led, regulated-industry value proposition.

Strengths

EY's client adoption strategy stands out. It features engagements with executive-sponsor vision alignment and explicit success metrics tracked through delivery. Adoption is accelerated via Wavespace design and innovation centers, as well as a ServiceNow COE that moves clients from project-based to product-centric operating models. Its customer service strategy is equally mature, anchored by a relationship-centric account model run through client service partners and a global voice-of-the-client feedback program embedded in leadership scorecards.

EY's strengths include its delivery capabilities. It pairs deep ServiceNow partner and industry expertise with a productized accelerator stack, the ITSM Blueprint, the AI4Delivery agentic SDLC suite, and the EYes and EYQA frameworks, which enforce ServiceNow leading practices and delivery quality compliance across the life cycle. This translates into strong customer service delivery that clients praise highly for problem resolution and proven methodologies, supported by an operate/managed services model for sustained engagement.

Challenges

EY has room to enhance its marketing strategy. While it runs regional, industry, and joint-partner campaigns and publishes thought leadership, it can increase its committed marketing investment behind the ServiceNow practice. Its sales and distribution strategy can also be enhanced by adding more routes to market through a broader, diverse partner channel to complement its well-developed direct sales route.

EY's go-to-market execution capabilities could be enhanced by improving market understanding of its partnership effectiveness and customer management. While EY invests heavily through WinLabs, AI4Delivery, and its Responsible AI framework, innovation and R&D capabilities are a related opportunity; EY's innovation is well regarded by clients, but broader market understanding of its innovation capabilities could be further improved.

Consider EY When

Consider EY when ServiceNow is entering regulated, governance-heavy territory such as risk, compliance, security, tax, finance, or sustainability, and sector-led advisory paired with platform execution is preferred. Assets such as IRM+, the Third-Party Risk Management Accelerator, and AI Governance and Compliance speak to that work, while the ITSM Blueprint, the AI4Delivery agentic SDLC suite, and the EYes and EYQA frameworks enforce quality across delivery.

APPENDIX

Reading an IDC MarketScape graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services, and how well aligned it is with customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will assess how well a vendor is building and delivering capabilities to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores and, ultimately, vendor positions on the IDC MarketScape on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market definition

The ServiceNow implementation services market covers the design, build, and integration functions of the plan-design-build-run life cycle of services associated with the ServiceNow platform. This study includes the implementation of all ServiceNow enterprise business solutions.

LEARN MORE

Related research

- *IDC MarketScape: Worldwide Digital Employee Experience 2026 Vendor Assessment* (IDC #US53014625, June 2026)
- *ServiceNow Knowledge and FAD 2026: Customer, Partner, and Market Expansion — AI Adoption Is the Focus* (IDC #lcUS54569226, May 2026)
- *ServiceNow Knowledge 2026: Platform-Led Agentic AI Accelerates Ecosystem Transformation and Reshapes Partner Roles* (IDC #EUR154560726, May 2026)
- *IDC MarketScape: Worldwide AIOps 2026 Vendor Assessment* (IDC #US54116226, March 2026)
- *ServiceNow's AI Strategy Leverages "The Power of the Ecosystem"* (IDC #EUR153914525, November 2025)

Synopsis

This IDC MarketScape represents a vendor assessment of the 2026 ServiceNow implementation services market through the IDC MarketScape model. It covers a range of vendors, spanning consultancies, global systems integrators, ServiceNow-native specialists, and regional specialists. The research is a quantitative and qualitative assessment of many characteristics that buyers consider when selecting a ServiceNow implementation services provider. This evaluation is based on a comprehensive set of parameters important to meeting the customer's current and future needs for ServiceNow projects. The report covers 31 vendors participating in the worldwide ServiceNow implementation services market. Twenty-three of the vendors were assessed via the complete IDC MarketScape methodology, while 8 were partially assessed.

"ServiceNow established itself in the IT service management (ITSM) landscape and has increasingly found applications across areas such as employee management, operations, and customer engagement. Today, ServiceNow further establishes its relevance across organizations as an enabler for AI and agentic AI with solutions such as AI Agent Orchestrator, Context Engine, Workflow Data Fabric, and AI Control Tower," says Jason Bremner, research vice president, IT Consulting and Systems Integration Services at IDC. "Service providers will play a critical role in enabling organizations to adopt and make the

most of these solutions. The value of an implementation partner will shift further toward advisory, governance design, operating model change, and outcome realization. Providers that convert broadly comparable delivery capability into differentiated, governed, and outcome-based offerings will be best positioned for the period ahead."

ABOUT IDC

International Data Corporation (IDC) is the premier global market intelligence, data, and events provider for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries. IDC's analysis and insight help IT professionals, business executives, and the investment community make fact-based technology decisions and achieve their key business objectives.

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