

Enterprise Service Management Services

A report on providers shaping AI-first, architecture-led ESM as intelligent enterprises' operating fabric

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From Enterprise IT to Enterprise AI: ESM becomes the engine of intelligent operations

Enterprise Service Management 2026: Why this study

Enterprise Service Management (ESM) is undergoing one of its most significant transitions since its emergence as an extension of IT service management (ITSM). Organizations are no longer viewing ESM as a workflow platform or process-management discipline. Instead, it is rapidly becoming the operating framework through which enterprise services, governance structures, data assets and intelligent automation capabilities are coordinated across business, technology and organizational domains.

The ISG Provider Lens® ESM Services 2026 study evaluates providers across three interconnected service portfolios:

- Consulting and advisory services
- Implementation and integration services

- Managed Services for converged IT and business operations

These portfolios collectively represent the lifecycle of enterprise transformation, from strategy and operating-model design to integration and ongoing optimization. The assessment examines how providers are helping U.S. organizations establish AI-ready foundations, engineer connected service environments and operate highly intelligent service ecosystems.

A clear theme has emerged in this year's study — ESM is evolving from a service-management discipline into an enterprise execution layer capable of connecting people, processes, data, governance and AI within a common operating model.

Market Context: The Forces Reshaping the ESM Market in the U.S.

AI has moved into the core operating environment

The strongest market force influencing ESM is the transition from automation-centric programs to AI-enabled operating environments; AI is being embedded within

ESM is becoming
the **governance**
layer for **AI-powered**
enterprises.



service design, governance frameworks, integration architectures, operational workflows and decision-support models. Providers no longer position AI as an extension of service management. It is becoming a part of the foundation on which future enterprise services are being built.

The market is clearly showing the following phases of development:

- Automation evolving into AI-enabled execution.
- AI-enabled execution evolving into agentic enterprise workflows.
- Agentic enterprise workflows evolving into autonomous operational models.

These developments are changing the expectations of how enterprise services are designed, delivered and measured.

ESM is expanding beyond traditional IT boundaries

A second structural shift is the expansion of ESM beyond technology operations. Service-management principles are being increasingly applied to business functions such as HR,

finance, procurement, customer operations, facilities and compliance management. Organizations are attempting to create greater consistency across service delivery while reducing operational fragmentation.

This expansion of the scope of ESM is increasing the demand for the following:

- Enterprise-wide governance models
- Unified service architectures
- Shared operational data layers
- Service orchestration frameworks
- Cross-functional operating models

Rather than managing various service domains independently, enterprise-wide coordination mechanisms are being increasingly chosen to ensure visibility and accountability across functions.

Governance is becoming a prerequisite for scale

As organizations increase AI adoption, governance is becoming inseparable from transformation strategy. Responsible AI practices, compliance requirements, risk management controls, accountability models

and data governance disciplines are becoming embedded within modernization initiatives from the outset.

This trend is particularly visible in regulated industries where accountability, auditability, operational resilience and policy compliance influence both technology and operating-model decisions. Governance is no longer just a risk-management activity. It has become an enabler of scalable transformation.

Organizations are focusing on outcomes rather than activities

The market is also moving away from pure process-oriented performance measurement; organizations are evaluating service effectiveness through operational outcomes, UX, business productivity and value creation. This transition is accelerating interest in experience-led operating models and outcome-oriented performance frameworks.

Enterprise Priorities: How U.S. Enterprises Are Responding

1. Establishing AI-ready foundations before scaling transformation

Organizations recognize that AI outcomes

depend on the quality of underlying foundations. As a result, many programs now begin with assessments focused on data quality, architecture maturity, governance readiness and operating-model alignment before the commencement of broader transformation efforts.

Common investment priorities include:

- Data modernization
- Governance readiness
- Enterprise architecture
- Operating-model redesign
- AI-readiness assessment frameworks

The objective is to create conditions that support long-term scalability rather than short-term automation gains.

2. Building enterprise-wide service models

Organizations are expanding service-management practices across multiple business functions to improve visibility, consistency and governance. ESM functions as a common language for coordinating services across technology and operational domains.



With broad initiatives, enterprises are prioritizing:

- Service orchestration
- Business capability mapping
- Governance alignment
- Cross-functional workflow design
- Common service operating models

This approach reflects a growing preference for enterprise-level transformation rather than isolated departmental modernization.

3. Improving resilience through operational intelligence

Operational resilience remains a significant priority across industries. Enterprises are investing in observability, telemetry, reliability practices and predictive operational capabilities to improve service continuity and reduce operational risks.

Rather than emphasizing incident response, enterprise buyers prioritize:

- Early risk detection
- Business-impact visibility
- Reliability improvement

- Predictive operational insights
- Continuous operational optimization

These capabilities are becoming essential as service environments become more interconnected and data-intensive.

4. Connecting funding decisions to measurable outcomes

Enterprise buyers are placing much emphasis on value realization. Transformation initiatives require measurable links between investment and business impact. This requirement has accelerated an interest in outcome-based frameworks and experience-centric performance models.

Enterprises evaluate programs by:

- Productivity improvements
- Experience outcomes
- Business effectiveness
- Operational efficiency
- Value realization

This trend influences provider selection, program governance and ongoing investment decisions.

5. Preparing for intelligent and autonomous operations

Enterprises are viewing autonomous operations as an achievable operating objective rather than a long-term aspiration. Buyer interest continues to grow in AI-assisted decision-making, intelligent orchestration, workflow automation and agentic operating models.

Consequently, enterprises are seeking governance and operating frameworks capable of supporting significant autonomy while maintaining transparency, accountability and control.

Provider Dynamics: How Supply Is Adapting to Enterprise Demand

Advisory portfolios are expanding beyond strategy development

Consulting and advisory services are centered on enterprise transformation rather than only technology strategy. Providers are integrating governance design, future-state operating models, enterprise architecture, AI readiness and data modernization into advisory engagements.

Differentiation depends on providers' ability to help organizations:

- Define transformation roadmaps
- Operationalize governance frameworks
- Align business and technology priorities
- Establish scalable operating models
- Translate strategy into measurable outcomes

The advisory market rewards providers that can connect planning activities to implementation and operational value realization.

Integration services are becoming orchestration-centric

Implementation and integration services continue to shift away from platform deployment and toward ecosystem orchestration. Providers emphasize integration of engineering capabilities that connect business systems, technology platforms, cloud environments and operational workflows.

Common delivery themes include:

- API-led integration
- Composable architectures
- Cloud-native engineering



Executive Summary

- Multi-platform interoperability
- Workflow orchestration
- Enterprise modernization

Providers position themselves as architects of connected service ecosystems rather than platform implementers.

Engineering models are embedding AI

Across implementation programs, AI is moving deeper into delivery processes. Providers are using AI-enabled assets to support engineering activities, automation initiatives, workflow orchestration, service-transition programs and modernization efforts. The shift, where AI is no longer treated as a post-deployment feature, is notable; it is becoming integrated into the delivery of transformation.

Managed services are becoming intelligent operations businesses

Managed Services are experiencing the most visible transformation among the three assessed portfolios of ESM. Across all the market leaders, traditional support-centric models are giving way to intelligent operating environments built around:

- Observability
- Automation
- SRE practices
- Predictive analytics
- CloudOps
- FinOps
- Autonomous operations

The focus is shifting from service management to service optimization. Providers are competing on their ability to improve resilience, operational intelligence and business outcomes while reducing dependency on manual operations.

Concurrently, the market is witnessing the convergence of business and technology operations. Providers are integrating operational telemetry, experience metrics, business performance indicators and governance controls into unified operational frameworks that support enterprise-wide visibility and continuous improvement.

Outlook (12–24 Months): What Comes Next

The market trajectory

In the next two years, ESM will continue to advance toward intelligent and autonomous

operations. The strongest organizations will be the ones successfully creating reliable operating environments where governance, AI, automation, architecture and operational discipline reinforce one another.

Leading indicators to watch out for

The following indicators are likely to signal market maturity:

- Growth in enterprise-wide service orchestration programs
- Increased adoption of AI governance frameworks
- Expansion of agentic operating models
- Broader use of observability-led operations
- Greater adoption of outcome-based engagement models
- Rising investment in operational intelligence capabilities

Together, these indicators point toward a future in which enterprises significantly rely on unified service ecosystems to coordinate both business and technology execution.

What enterprises should prioritize

Organizations should focus on:

1. Strengthening governance and accountability structures
2. Improving data quality and architectural consistency
3. Establishing operational intelligence capabilities
4. Aligning service models across functions
5. Building scalable foundations for intelligent automation

These areas will significantly influence the success of future AI-driven transformation initiatives.

What providers should prioritize

Providers should focus on:

1. Developing repeatable transformation frameworks
2. Expanding orchestration and integration capabilities
3. Demonstrating measurable business outcomes



Executive Summary

4. Embedding governance throughout delivery lifecycles
5. Shifting to agentic enterprise service management capabilities from traditional ESM

Providers that successfully connect these capabilities will be best positioned to support complex enterprise transformation agendas.

Conclusion: The Rise of Enterprise Operating Fabric

The ESM space in the U.S. is moving beyond process modernization and workflow management. Enterprises expect service ecosystems to connect governance, architecture, integration, observability, intelligent operations and measurable business outcomes within a common execution framework. As AI is increasingly being embedded into advisory, engineering and operational environments, ESM is evolving into an operating fabric through which organizations can coordinate enterprise services at scale. The best providers positioned for future leadership will be the ones that can connect strategy,

engineering and operations, while enabling governed, scalable and outcome-focused enterprise transformation.

In the U.S., enterprises are extending ESM beyond IT into business functions while investing in AI readiness, observability, orchestration and intelligent operations. Providers are responding by converging advisory, engineering and run-state capabilities into unified transformation models.





Provider Positioning

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	Consulting and Advisory Services	Implementation and Integration Services	Managed Services for Converged IT and Business Ops
Accenture	Leader	Leader	Leader
Advance Solutions	Contender	Contender	Contender
Aspire Systems	Not In	Contender	Not In
Atos	Product Challenger	Product Challenger	Product Challenger
Birlasoft	Product Challenger	Product Challenger	Rising Star ★
Capgemini	Leader	Leader	Leader
Cognizant	Leader	Leader	Leader
Cprime	Product Challenger	Product Challenger	Product Challenger
Deloitte	Leader	Leader	Not In
DXC Technology	Product Challenger	Product Challenger	Leader
Flycast Partners	Contender	Not In	Not In





Provider Positioning

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	Consulting and Advisory Services	Implementation and Integration Services	Managed Services for Converged IT and Business Ops
Fujitsu	Product Challenger	Product Challenger	Product Challenger
Genpact	Leader	Leader	Leader
HCLTech	Leader	Leader	Leader
Hexaware	Product Challenger	Product Challenger	Product Challenger
IBM	Leader	Not In	Not In
Infosys	Leader	Leader	Leader
KPMG	Market Challenger	Not In	Not In
Kyndryl	Product Challenger	Product Challenger	Product Challenger
LTM	Leader	Leader	Leader
Movate	Contender	Contender	Contender
Mphasis	Contender	Product Challenger	Contender





Provider Positioning

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	Consulting and Advisory Services	Implementation and Integration Services	Managed Services for Converged IT and Business Ops
NewRocket	Rising Star ★	Rising Star ★	Product Challenger
NTT DATA	Market Challenger	Market Challenger	Market Challenger
Ondaro	Rising Star ★	Rising Star ★	Product Challenger
Persistent Systems	Not In	Market Challenger	Not In
TCS	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Leader
Unisys	Product Challenger	Product Challenger	Product Challenger
Wipro	Leader	Leader	Leader



This **ESM services** study examines AI-enabled, architecture-led ecosystems driving intelligent, outcome-based enterprise services.

Simplified Illustration Source: ISG 2026

Consulting and Advisory Services

Implementation and Integration Services

Managed Services for Converged IT and Business Ops

Definition

Enterprise service management (ESM) is entering a pivotal phase of evolution from its roots as an ITSM-centric discipline into a foundational operating fabric for intelligent enterprises. This shift represents the transition from enterprise IT to enterprise AI, where service management becomes the connective layer across business, corporate and technology portfolios, unified by shared governance, data and automation. ESM is no longer defined by workflows or tickets alone; it is increasingly the mechanism through which enterprises design, integrate and optimize services at scale.

The ESM Services Study 2026 examines how providers are enabling this transformation across three core service portfolios: ESM Consulting and Advisory Services, ESM implementation and Integration Services and ESM Managed Services for Converged IT and Business Ops. Enterprises are extending traditional ITSM into a broader digital operations layer, integrating cloud, observability, service orchestration, automation and AI-enabled service management.

Providers are turning advisory, engineering and run-state capabilities into cohesive advice-build-run models supported by enterprise architecture, composable integration and intelligent operations.

The market is moving toward outcome-based, AI-powered enterprise services. As ESM expands beyond IT into organizational and business functions, enterprises are pursuing pan-enterprise initiatives to establish a unified intelligence fabric and a One AI operating state governed across process, data and platforms. This study evaluates providers' ability to drive this paradigm shift, connecting strategy, engineering and operations to deliver resilient, scalable and future-ready enterprise service ecosystems.



Scope of the Report

This ISG Provider Lens® quadrant report covers the following three quadrants for services/solutions: Consulting and Advisory Services, Implementation and Integration Services, and Managed Services for Converged IT and Business Ops.

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

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

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

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

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





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 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.





Consulting and Advisory Services

Who Should Read This Section

This report is valuable for service providers offering **Consulting and Advisory Services** in **US** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Strategy and business leaders

Should read this report to understand how enterprise service management is evolving into an AI enabled, architecture driven operating model and identify the right advisory partners for long-term transformation. It provides insights into providers' ability to design enterprise-wide service strategies, align operating models with business goals, and enable scalable, intelligent service ecosystems across functions.

Technology and architecture professionals

Should read this report to understand how service providers design and operationalize enterprise service architectures, data and AI foundations, and governance frameworks across business and IT landscapes. The report offers insights into providers' capabilities in applying BOA EOA models, integrating platforms, and enabling scalable, interoperable and future ready service ecosystems.

IT and service management professionals

Should read this report to understand how advisory-led ESM initiatives translate into operational frameworks, process models and service governance structures across the enterprise. The report provides insights into providers' capabilities in standardizing workflows, improving service integration, and enabling scalable service management practices that support cross-functional operations and continuous transformation.

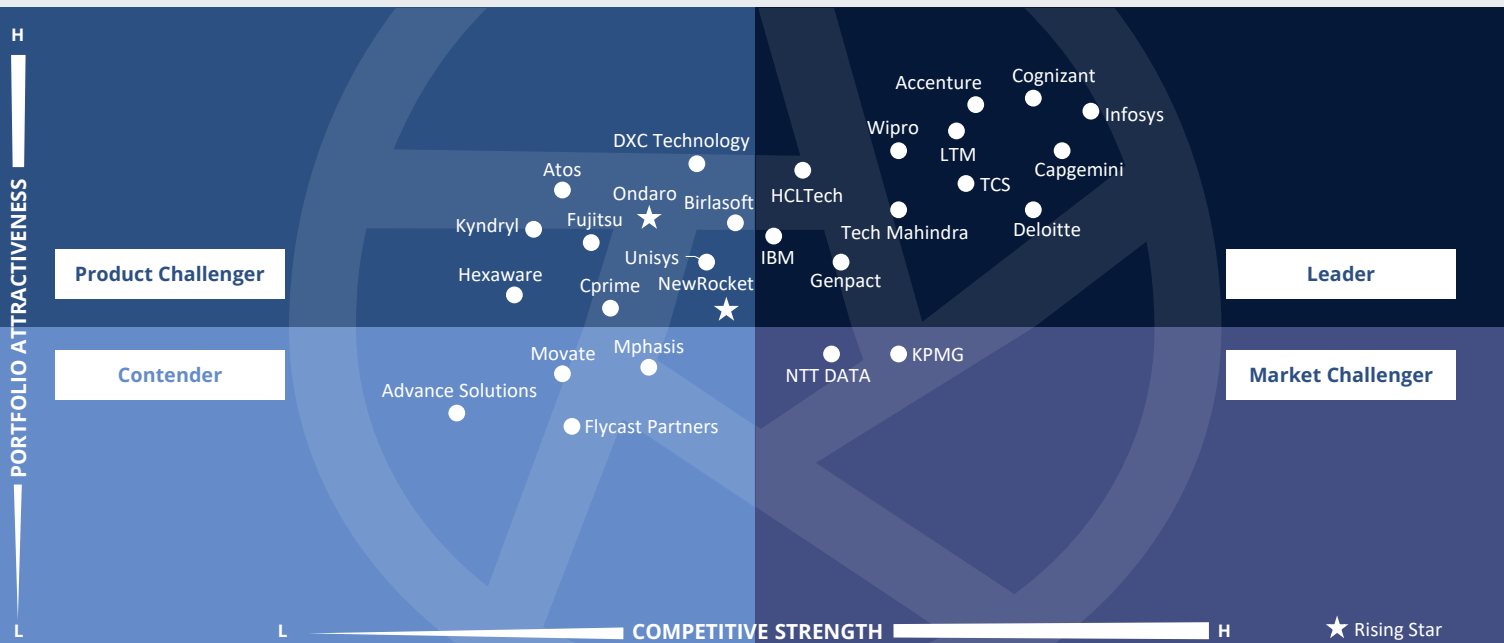
Risk, governance and transformation leaders

Should read this report to understand how service providers embed governance, compliance and change management into enterprise service management strategies while scaling AI enabled transformation. The report offers insights into providers' capabilities in establishing governance frameworks, aligning risk and compliance with service design and enabling sustainable, enterprise-wide adoption of intelligent service models.



Enterprise Service Management Services Consulting and Advisory Services

U.S. 2026



The quadrant evaluates providers' ability to define AI-first service strategies, **combining governance, enterprise architecture, data modernization, operating-model transformation and value-realization frameworks** into scalable, business-aligned ecosystems.

Ashwin Gaidhani



Definition

This quadrant evaluates service providers on their ability to define, architect and guide enterprise-wide service transformation across business, corporate and technology portfolios. Providers in this quadrant combine strategic advisory excellence with modern service management practices to help enterprises achieve agility, operational resilience and AI-driven modernization.

The quadrant emphasizes service strategy, including multi-industry advisory, governance frameworks and AI-first enterprise systems, while integrating robust service design and engineering capabilities. Providers must demonstrate strength in enterprise architecture, BOA-EOA frameworks, analytics and reporting layers, and data and AI foundations to build scalable, intelligent and future-ready service ecosystems. By aligning strategy, design thinking and advanced AI engineering, these providers enable sustainable enterprise transformation and measurable business value.

Eligibility Criteria

1. Demonstrate capability in multi-industry and **multi-function consulting**, guiding organizations in enterprise service strategy, operating model design and transformation roadmaps
2. Proven experience in applying **ITIL, governance frameworks and risk, security and compliance models** to drive service consistency and operational excellence
3. Strong credentials in embedding **AI-driven automation, predictive intelligence, workflow orchestration** and AI-enabled decision support across enterprise services
4. Ability to design and implement **BOA-EOA architectures**, scalable service blueprints and modular service models aligned to business and technology needs
5. Expertise in building analytics platforms, reporting layers, **AI and ML models and data governance structures** to deliver real-time visibility and actionable insights
6. Experience modernizing platforms through **cloud, DevOps**, microservices and integration of digital, ITSM/ESM and enterprise platforms
7. Showcase efficiency gain, **cost optimization, automation benefits** and measurable improvements in service performance and CX



Consulting and Advisory Services

Observations

Consulting and advisory services have evolved beyond traditional ITSM strategy into AI-driven business transformation, governance and operating-model redesign. Advisory engagements are commencing with an AI-first vision supported by governance frameworks, data foundations, enterprise architecture and value realization plans. Leaders are positioning AI strategy and responsible AI governance as core consulting disciplines, reflecting a demand for reliable and scalable AI adoption. Advisory services are also becoming more architecture-centric, emphasizing business capability alignment, composable operating models and AI-ready data ecosystems that connect business priorities, technology investments and governance requirements into structured roadmaps.

Another major shift is the expansion of the scope of ESM from IT into HR, finance, procurement, customer operations, risk and compliance, thus driving the demand for governance-led operating models, SIAM evolution, service orchestration and process

redesign. Providers are differentiating themselves through advisory assets such as AI Refinery®, AI Force, AI WisdomNext™, Topaz, ESM Café, AI Continuum, AI Maestro, Enterprise Service Intelligence and Trustworthy AI™ frameworks that support readiness assessments, investment prioritization and governance. The quadrant demonstrates that consulting leadership is increasingly being defined by the ability to connect strategy with execution while fostering governance-led service ecosystems that deliver measurable business outcomes.

From the 30 companies assessed for this study, 28 qualified for this quadrant, with 12 being Leaders and two Rising Stars.

accenture

Accenture helps enterprises define AI strategy, establish governance frameworks, modernize data foundations and design AI-first operating models through advisory-led transformation, AI Refinery® and enterprise architecture services.



Capgemini delivers outcome-driven enterprise service management (ESM) advisory services through a business-first consulting model that combines operating model transformation, connected orchestration, AI-enabled decision support and platform-agnostic enterprise service design backed by a strong ecosystem of technology and innovation partners.



Cognizant's AI-native ESM implementation and integration services are powered by a ServiceNow-led, platform-agnostic portfolio, supported by multi-industry delivery teams, strategic partnerships with ServiceNow, IBM, NVIDIA and Rubrik, and continued investment in US AI innovation studios, enterprise AI platforms and multi-agent orchestration frameworks.

Deloitte.

Deloitte enables organizations to define AI strategy, strengthen governance, modernize data foundations, and align business and technology transformation through integrated advisory, risk and engineering capabilities.



Genpact combines AI-led advisory, enterprise architecture, governance design and platform-agnostic transformation planning to enable organizations to establish scalable agentic operating models and enterprise-wide service modernization programs.

HCLTech

HCLTech provides enterprises with an AI strategy and supports them in establishing governance frameworks, modernizing data foundations and scaling AI adoption through advisory-led transformation models, AI Labs and responsible AI capabilities.



Consulting and Advisory Services



IBM provides consulting and advisory services that combine AI strategy, governance, enterprise architecture and data transformation to enable organizations to design, govern, and scale business-aligned service modernization initiatives.



Infosys delivers consulting-led enterprise service transformation through an AI-first strategy, industry-contextualized advisory, governance-driven operating models and a portfolio of accelerators that connect service modernization with business outcomes.



LTM brings together Enterprise Service Intelligence advisory, AI governance, service integration and management (SIAM) transformation and operating-model consulting to help organizations in building scalable, intelligence-led service ecosystems anchored in governance and measurable business outcomes.



TCS' expertise lies in undertaking AI-led business strategies, establishing governance frameworks and modernizing data foundations, as well as scaling enterprise transformation through industry-focused consulting, platforms and responsible AI advisory services.



Tech Mahindra offers consulting and advisory services through a platform-led transformation approach that combines service strategy, governance, enterprise architecture, AI-enabled service management and industry-focused modernization frameworks.



Wipro offers consulting and advisory services that combine AI-enabled service transformation, experience-led governance, service integration and management (SIAM)-based operating models, and ITIL v5-aligned enterprise service modernization.



New Rocket (Rising Star) offers ESM solutions that comprise AI-enabled service transformation strategies through industry-focused advisory, governance-led architecture design and outcome-oriented roadmap development anchored by its FlightPath methodology.



Ondaro (Rising Star) has consulting and advisory offerings that define and govern service transformation through AI-led strategy, enterprise architecture, advisory operating models and adoption-focused enablement, built around its ServiceNow-centered consulting portfolio.



LTM



"LTM earns its leadership recognition for its ability to translate service management into an enterprise AI foundation through offerings such as AIMS and Knowledge Fabric, and its governance-led consulting approach."

Ashwin Gaidhani

Overview

LTM is headquartered in Mumbai, India. It has over 87,000 employees across 40 countries. In FY26, the company generated \$4.8 billion in revenue. LTM has repositioned its ESM consulting portfolio around Enterprise Service Intelligence (ESI), treating service management as the foundation for enterprise AI adoption, governance and operating-model transformation. The firm supports transformation initiatives across IT, HR, finance, legal, GRC and supply chain functions, backed by ITIL-based consulting, ISO 42001-aligned AI governance and a broad ecosystem spanning ServiceNow, Microsoft, AWS, EY, KPMG and QUINT as partners.

Strengths

Governance-led AI advisory: LTM integrates AI governance directly into consulting engagements through the AIMS Modernization Suite, RightAction framework and ISO 42001-aligned methodologies. Advisory services encompass AI maturity assessments, governance operating models, auditability, compliance and responsible AI adoption. This capability is highly relevant as enterprises seek structured approaches to govern AI-enabled service environments while maintaining operational control.

Strong SIAM consulting foundation: The company combines OSI Advisory, i-SIAM and the HINGE+ framework to design multi-provider governance, orchestration and service integration models. HINGE+ incorporates predictive

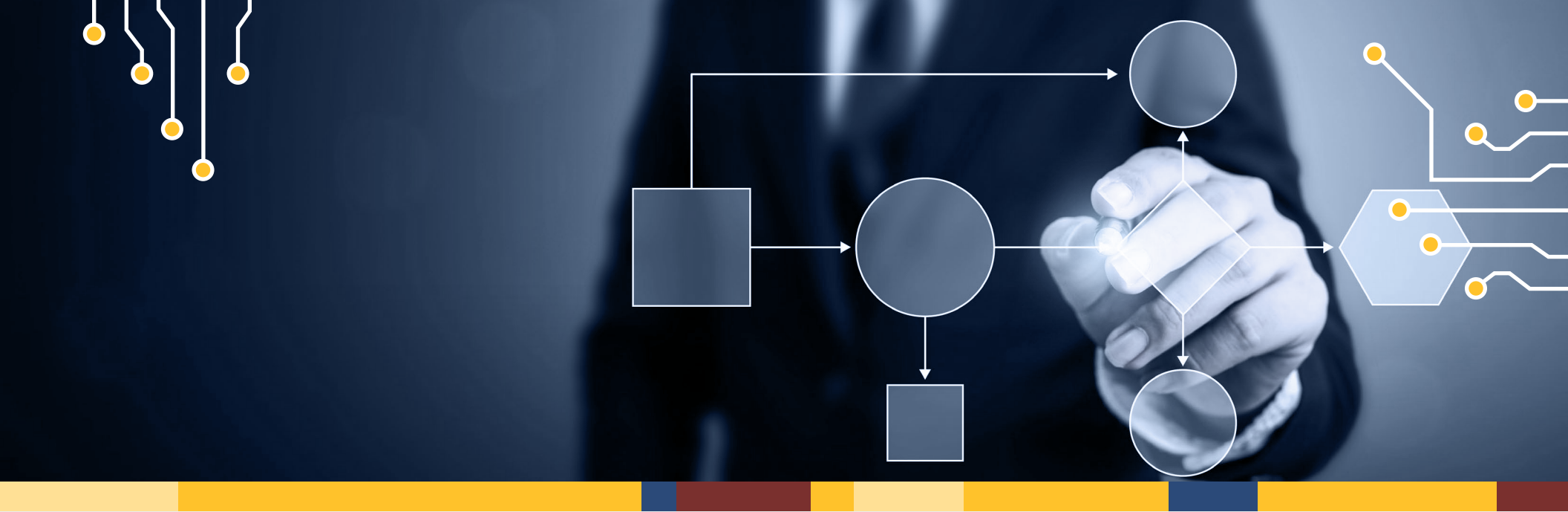
supplier management, experience-based measurement, AI-driven orchestration and knowledge-fabric-enabled governance.

Scaled consulting expertise: LTM supports its advisory business with more than 30 completed strategic consulting engagements in the last 24 months; over 300 ITIL-certified professionals; more than 150 ITIL experts; and a network of SIAM, AI and governance specialists. The practice is further strengthened by over 10 CoEs and AI labs, helping clients access structured expertise for service strategy, governance design and enterprise transformation programs.

Caution

LTM's strengths in Knowledge Fabric, AIMS and SIAM consulting create a strong foundation for enterprise transformation. However, the company can grow by expanding its multi-platform enterprise architecture guidance capabilities, aligning AI adoption, data strategy, governance and service modernization outcomes.





Implementation and Integration Services

Who Should Read This Section

This report is valuable for service providers offering **Implementation and Integration Services** in **US** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Digital transformation leaders

Should read this report to understand how service providers enable enterprise-wide service implementation through platform engineering, integration and modernization. The report provides insights into providers' capabilities in deploying ESM platforms, integrating enterprise systems and accelerating transformation using composable architectures, cloud-native approaches and AI-enabled workflows to achieve scalable and interoperable service environments.

Technology and engineering professionals

Should read this report to gain insights into providers' expertise in system integration, platform configuration and application orchestration across complex enterprise environments. It highlights capabilities in API-led integration, DevOps practices and multi-platform ecosystem connectivity, helping teams evaluate partners that can deliver resilient, scalable and secure implementations aligned with enterprise architecture and engineering standards.

IT and operations professionals

Should read this report to understand how ESM implementations translate into standardized workflows, service integration and operational efficiency across functions. The report offers insights into providers' ability to enable seamless service transition, ensure system interoperability and support continuous optimization of enterprise service operations through automation, monitoring and structured service management practices.

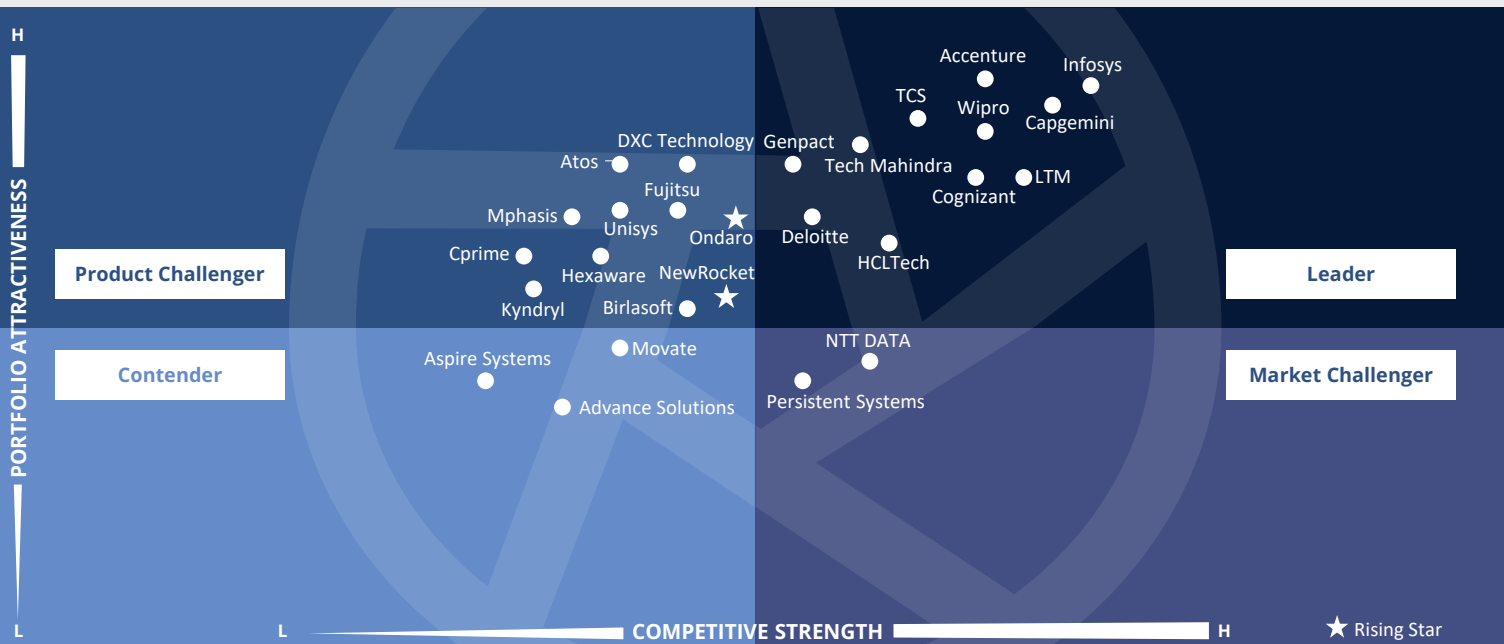
Security, risk and compliance leaders

Should read this report to evaluate how providers integrate security, governance and compliance into ESM implementation and integration services. The report provides visibility into providers' capabilities in embedding secure architectures, managing data protection and aligning platform deployments with regulatory requirements while ensuring scalable, reliable and risk-aware enterprise service environments.



Enterprise Service Management Services Implementation and Integration Services

U.S. 2026



This quadrant evaluates providers' ability to connect enterprise service ecosystems, for business and technology, through **cloud-native engineering, API-led integration, composable architectures, and multi-platform orchestration.**

Ashwin Gaidhani



Implementation and Integration Services

Definition

This quadrant evaluates service providers on their ability to deliver seamless enterprise service implementation, system integration and service transition across business, corporate and technology portfolios. Providers in this quadrant must demonstrate strong capabilities in configuring workflow platforms, integrating internal and external business systems and enabling interoperability across hybrid, multi-cloud and on-premises environments.

The quadrant examines service transition and engineering competencies, including application workload orchestration, portability and composable architecture design that supports modular, scalable and reusable components. Providers must further showcase expertise in cloud integration, ranging from cloud-native migration to hybrid and multi-cloud enablement, ensuring secure, high-performance and future-ready enterprise systems. By combining technical integration, automation engineering and cloud-first modernization, these providers enable resilient, connected and scalable digital ecosystems.

Eligibility Criteria

1. Proven capability in deploying **workflow management platforms** and integrating internal and external business systems for unified service operations
2. Ability to integrate across **cloud, on premises, SaaS and third-party platforms**, ensuring seamless enterprise connectivity
3. Showcase strength in **engineering modular, portable and reusable application components** supporting scalable enterprise ecosystems
4. Demonstrate experience in orchestrating workloads across **cloud, hybrid and edge environments** for high availability and reliability
5. Expertise in **cloud-native development, hybrid/multi-cloud integration** and **secure transition** of enterprise workloads
6. Use of **APIs, DevOps pipelines, CI/CD automation** and **event-driven architecture** to accelerate deployment and integration
7. Capabilities in **AI- and ML-driven workflows, predictive analytics** and **zero-touch orchestration** to enhance enterprise automation and system resilience



Implementation and Integration Services

Observations

Across the U.S., implementation and integration services are shifting from platform deployment toward modernization, orchestration and AI-enabled integration. Leaders are increasingly positioning implementation as a discipline that combines workflow automation, application modernization, cloud-native engineering and interoperable architecture design. A key trend is the adoption of composable, API-led and platform-agnostic integration models. Providers are emphasizing reusable architectures, API connectivity, microservices, workflow orchestration and multi-platform interoperability to connect ERP, HR, CRM, observability, cloud and business systems into unified environments. AI is also becoming a core engineering layer.

Platforms and accelerators such as AI Refinery®, Neuro®, AI Maestro, AI Force, Topaz, BlueVerse and MasterCraft™ are being used to automate modernization, accelerate deployment and simplify service transitions. The market is also seeing an increased focus on cloud-native modernization through cloud migration,

containerization, workload portability and scalable architectures optimized for hybrid and multicloud environments. Deployment assets, including ESM Café, PRISM, Pulse, HCLTech's Prizm, Cloud Bridge, AI Maestro, Crystallus™ and MasterCraft™, are helping to reduce implementation complexity and improve delivery consistency. The quadrant highlights that provider success increasingly depends on orchestrating complex ecosystems, embedding AI into delivery lifecycles, modernizing legacy environments and building connected service platforms that span business and technology functions.

From the 30 companies assessed for this study, 27 qualified for this quadrant, with 11 being Leaders and two Rising Stars.

accenture

Accenture's expertise comprises cloud-native modernization, platform engineering, composable architectures and AI-enabled integration capabilities that connect applications, data and business processes.



Capgemini's implementation and integration services combine modular offerings, platform-agnostic orchestration, continuous engineering practices and investments in Pulse, PRISM and ecosystem partnerships that enable connected enterprise service environments.



Cognizant constitutes a ServiceNow-led, platform-agnostic portfolio, supported by multi-industry delivery teams, strategic partnerships with ServiceNow, IBM, NVIDIA and Rubrik and continued investment in U.S.-based AI innovation studios, enterprise AI platforms and multi-agent orchestration frameworks.

Deloitte.

Deloitte implementation and integration services combine platform deployment, application modernization, cloud transformation and enterprise integration capabilities supported by alliance-driven execution and engineering-led delivery.



Genpact's implementation and integration services are powered by its AI Gigafactory model, which combines agentic engineering, platform-agnostic integration, telemetry-led delivery and AI Maestro-enabled modernization across enterprise applications and workflows.

HCLTech

HCLTech implementation and integration services comprise API-led connectivity, cloud-native engineering and workflow transformation supported by strategic ecosystem partnerships and proprietary accelerators.



Infosys delivers its implementation and integration services expertise through ServiceNow-led transformation, AI-enabled accelerators, industry-specific solutions and a delivery model supported by extensive platform expertise and ecosystem partnerships.



Implementation and Integration Services

LTM

LTM focuses on delivering the Enterprise Service Intelligence model, combining platform engineering, AI-enabled workflows, ServiceNow-led transformation and knowledge-driven automation to modernize service ecosystems.



TCS' portfolio comprises platform-led transformation, cloud-native modernization, API-driven integration and AI-enabled engineering supported by strategic ecosystem partnerships and industry-focused accelerators.



Tech Mahindra's implementation and integration services adopt an integration-first approach that combines ServiceOps architecture, cloud modernization, platform engineering and AI-enabled automation across enterprise service environments.



Wipro combines its implementation and integration services with architecture-led platform engineering, API-driven integration, service orchestration and AI-enabled workflow modernization across enterprise service ecosystems.

NEWROCKET

NewRocket's integration and implementation portfolio brings AI-first ServiceNow implementation and integration services that combine platform modernization, multi-system orchestration and outcome-based delivery through proprietary accelerators, governance-led engineering and strategic partnerships.

Ondaro

Ondaro offers enterprise implementation and integration services through AI-enabled workflow deployment, multi-platform connectivity and structured transformation programs supported by a ServiceNow-centric ecosystem and regulated-industry expertise.



LTM



"LTM's leadership stems from its ability to combine Enterprise Service Intelligence, Knowledge Fabric and agentic automation to support enterprise integration and service transformation at scale."

Ashwin Gaidhani

Overview

LTM is headquartered in Mumbai, India. It has over 87,000 employees across 40 countries. In FY26, the company generated \$4.8 billion in revenue. LTM's implementation and integration services are anchored in its Enterprise Service Intelligence (ESI) model, which combines platform deployment, AI-enabled workflow integration and service transition engineering. The company leverages BlueVerse, Knowledge Fabric, agentic AI frameworks and ServiceNow-led transformation capabilities to connect business and technology workflows across enterprise environments.

Strengths

Multi-platform deployment expertise:

LTM supports enterprise implementations across ServiceNow, BMC, Ivanti and SummitAI environments and is backed by more than 1,050 platform implementations and over 900 certified platform professionals. Its platform-agnostic delivery model helps organizations operating heterogeneous technology estates consolidate workflows, integrate platforms and standardize service operations across multiple systems of record.

Agentic workflow engineering: LTM has operationalized AI-driven implementation capabilities through more than 80 AI-enabled use cases, over 20 active agentic workflows and 61 purpose-built ESM agents. These assets span ITSM processes, infrastructure operations, assurance functions and

knowledge management. This approach helps enterprises implement intelligent workflows, automate service interactions and accelerate the transition toward autonomous service operations.

AI-enabled integration architecture:

LTM has moved beyond isolated automation projects to embed AI across enterprise service workflows through its Enterprise Service Intelligence framework. Its implementation architecture combines Knowledge Fabric, Agent API platforms, BlueVerse and agent-enabled orchestration to integrate business functions and technology environments.

Caution

Even as LTM scales agentic workflows through BlueVerse and Knowledge Fabric, it could further expand U.S.-focused reference architectures for hybrid enterprise environments by linking AI-enabled orchestration, observability and multi-platform integration into repeatable transformation patterns.





Managed Services for Converged IT and Business Ops

Who Should Read This Section

This report is valuable for service providers offering **Managed Services for Converged IT and Business Ops** in **US** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Strategy and business leaders

Should read this report to understand how enterprises are transitioning from traditional IT operations to AI enabled, converged service models that integrate IT and business functions. The report provides insights into providers' ability to deliver outcome-driven managed services, optimize enterprise performance and enable scalable, intelligent operations aligned with business objectives and long-term transformation goals.

Operations and service delivery leaders

Should read this report to evaluate providers' capabilities in managing and optimizing enterprise service operations across IT and business domains. The report offers insights into service providers' strengths in observability, workflow orchestration, automation and continuous service improvement, helping leaders select partners that ensure resilience, efficiency and high-performance service delivery at scale.

IT and platform engineering professionals

Should read this report to understand how providers operationalize modern service management practices through cloud-native platforms, SRE/PRE models and AI-driven automation. It highlights capabilities in integrating technologies, improving system reliability and enabling predictive and autonomous operations that support scalable, secure and future-ready enterprise environments.

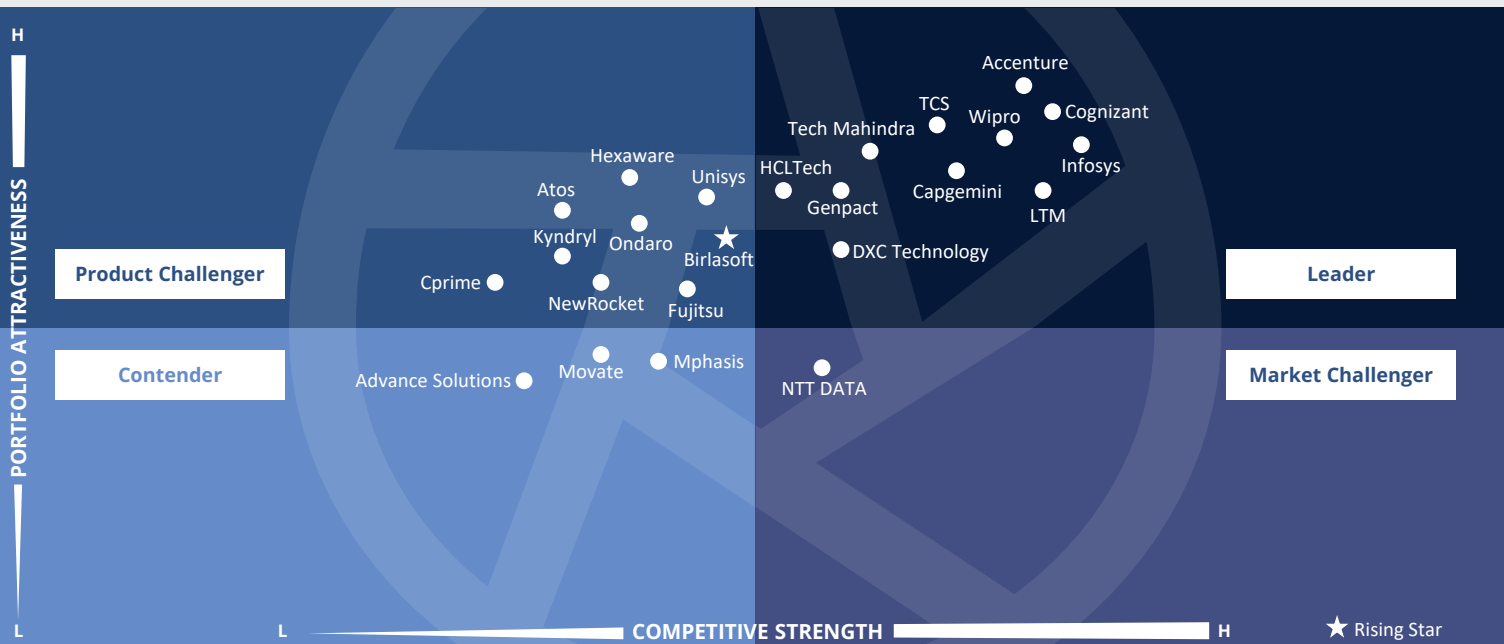
Risk, finance and governance leaders

Should read this report to assess how providers incorporate FinOps, RiskOps and compliance frameworks into managed service delivery. The report provides insights into providers' capabilities in cost optimization, risk management, regulatory alignment and secure operations, enabling enterprises to achieve financial transparency, operational control and governance-driven outcomes across converged service environments.



Enterprise Service Management Services Managed Services for Converged IT and Business Ops

U.S. 2026



This quadrant evaluates providers' capabilities to deliver intelligent, converged operations by **integrating observability, SRE practices, CloudOps, FinOps and process orchestration** to improve resilience, operational performance and business outcomes.

Ashwin Gaidhani



Managed Services for Converged IT and Business Ops

Definition

This quadrant evaluates providers on their ability to deliver unified, intelligent and resilient operations across IT and business functions. They must excel in enterprise service operations, enabling performance optimization, observability, workflow orchestration and automation-driven service management. Their capabilities must support intelligent service operations through Service Reliability Engineering (SRE)/Platform Reliability Engineering (PRE) practices, ensuring reliability, scalability and proactive fault resolution across enterprise ecosystems.

The quadrant assesses continuous service improvement through AI-powered solutions, predictive and prescriptive analytics and automated decision intelligence. Providers must demonstrate strength in cloud and technology modernization, supporting cloud-native platforms, hybrid IT and application modernization initiatives. By integrating AI-driven automation, cloud transformation and operational intelligence, providers enable future-ready, converged IT and business operations.

Eligibility Criteria

1. Proven ability to deliver high-performance operations through **real-time monitoring, observability, optimization and proactive resource management** across IT and business services
2. Demonstrate **AI-driven automation, ITSM orchestration and self-healing workflows** to enhance operational efficiency and reduce reliance on manual intervention
3. Experience implementing **SRE and production readiness engineering practices** to ensure scalability, fault tolerance and continuous availability
4. Integrate **GenAI, AI, predictive analytics and anomaly detection** to improve decision-making, operational intelligence and performance optimization
5. Expertise in **cloud-native architectures, platform modernization, multi-cloud/hybrid management and agile IT frameworks** to support converged operations
6. Demonstrate strong capabilities in **cloud financial governance**, cost optimization, risk management, regulatory compliance and secure cloud operations
7. Showcase outcomes in **service reliability, efficiency gains, automation-led improvements** and business continuity across enterprise environments



Managed Services for Converged IT and Business Ops

Observations

In the ESM space, managed services are moving from SLA-driven support toward AI-enabled, engineering-centric operations, focused on resilience, business outcomes and autonomous execution. Traditional service desk and infrastructure management offerings are being replaced by intelligent operations models that combine observability, automation, SRE practices, cloud governance and AI-driven decision-making. Providers are increasingly emphasizing predictive management, self-healing workflows and continual optimization rather than just incident response. A defining trend is the convergence of IT and business operations into unified operational fabrics. Providers are integrating workflows, supplier ecosystems, business processes, operational telemetry and experience metrics into connected operating layers that link service performance to business outcomes.

Frameworks such as Connected Orchestration, Experience360, Economics360, Intelligent Operations, Enterprise Service Intelligence

and AIIMS exemplify this shift. Observability and reliability engineering have also become core capabilities, combining telemetry from applications, cloud, networks, users and business processes to improve visibility, root-cause analysis and remediation. AI is emerging as the operational control layer through platforms such as AI Force.ITOps, AI Refinery™, ignio™, Cognix™, AI Maestro, AIIMS and DXC OASIS, enabling governed autonomous execution across workflows and operational processes. CloudOps, FinOps and governance are increasingly being embedded into delivery models. The quadrant demonstrates that managed services' leadership is defined by the ability to orchestrate intelligent, converged operations that combine automation, observability, governance and AI into scalable operational ecosystems.

From the 30 companies assessed for this study, 24 qualified for this quadrant, with 11 being Leaders and one a Rising Star.

accenture

Accenture delivers managed services through intelligent operations, AI-powered automation, observability-led management, cloud modernization and SRE-informed operating models that help organizations continually improve service performance.

Capgemini

Capgemini's engineering-led managed services offer connected orchestration, SRE-based operations, AI-enabled governance and platform-powered service management, supported by ongoing investments in Pulse, PRISM, ecosystem partnerships and enterprise service innovation.

cognizant

Cognizant's converged IT and business managed services comprise AI-enabled operations, observability, SRE, automation and FinOps capabilities, supported by strategic ecosystem partnerships, continuous AI investment, and a service model focused on business-aligned operational outcomes.

DXC

DXC Technology's managed services portfolio consists of AI-powered operations, enterprise observability, automation, cloud optimization and agentic orchestration designed to improve resilience, operational visibility and business performance.



Managed Services for Converged IT and Business Ops



Genpact delivers engineering-led managed services through agentic operations, AI-enabled orchestration, continuous modernization and platform-agnostic service management supported by AI Maestro, advanced technology investments and ecosystem partnerships.

HCLTech

HCLTech managed services are powered by autonomous operations, observability-led service management, SRE-driven reliability engineering, AI-powered automation and cloud optimization frameworks that improve operational resilience and performance.



Infosys offers managed service transformation through AI-enabled operations, enterprise service orchestration, industry-aligned solutions and a scalable ServiceNow ecosystem strengthened by continuous innovation and platform expertise.



LTM's AI-enabled managed services leverage its iRUN operating model, combining service orchestration, governance, observability and enterprise-wide workflow integration to support converged IT and business operations.



TCS brings its expertise in managed services through AI-powered operations, observability, automation, cloud optimization and autonomous operating models designed to improve resilience, service performance and business agility.



Tech Mahindra's managed services are powered by a ServiceOps-led model that combines observability, automation, AI-enabled operations, cloud optimization and platform governance to improve service performance and business outcomes.



Wipro's AI-enabled managed services comprise an experience-led operating model that combines service orchestration, automation, governance and intelligent operations across enterprise service environments.



Birlasoft (Rising Star) delivers its managed services through ServiceNow-centric operations, automation-first delivery, observability, agentic AI capabilities and continual service improvement frameworks designed to optimize enterprise service performance.



LTM



"LTM distinguishes itself through its iRUN model, which combines Enterprise Service Intelligence, governance and automation-led operations into a unified managed services framework."

Ashwin Gaidhani

Overview

LTM is headquartered in Mumbai, India. It has over 87,000 employees across 40 countries. In FY26, the company generated \$4.8 billion in revenue. LTM's managed services portfolio is built around its AI-led iRUN operating model, which converges IT and business operations through Enterprise Service Intelligence, Cognitive ServiceOps and Knowledge Fabric. The company integrates service orchestration, observability, automation and governance to help enterprises shift from reactive support to predictive and autonomous operations.

Strengths

AI-native run operations: LTM's iRUN model combines human expertise, agentic AI, Cognitive ServiceOps and platform-led operations to transform service delivery from reactive support to proactive value creation. It integrates AI reasoning, automated execution, knowledge-driven decision support and governance controls to modernize operational management while improving resilience and service continuity.

Knowledge-driven service assurance: LTM's Knowledge Fabric serves as the intelligence layer connecting structured, unstructured and siloed enterprise information. Combined with BlueVerse and Cognitive ServiceOps, it enables contextual correlation, predictive operational insights, accelerated incident resolution and

decision-ready visibility. These capabilities are important for managed services organizations seeking unified operations across complex service ecosystems.

Intelligent automation at scale: LTM has industrialized managed services automation through 61 purpose-built ESM agents, more than 80 AI-enabled use cases, over 20 agentic workflows in production and 70 percent automation coverage across L0/L1 operations. These capabilities reduce dependency on manual support and accelerate the transition to autonomous operations across IT and business services.

Caution

LTM can further evolve its managed services portfolio by extending Knowledge Fabric and Cognitive ServiceOps into broader cloud modernization and workload-governance use cases, enabling enterprises to align operational resilience, cost governance and autonomous service delivery.





Appendix

Methodology & Team

The ISG Provider Lens® 2026 – Enterprise Service Management Service study analyzes the relevant service providers in the US 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 service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of August 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in the following steps:

1. Definition of Enterprise Service Management Services 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 & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
 - * Strategy and vision
 - * Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * Technology advancements



Author and Editor Biographies

Lead Analyst



Ashwin Gaidhani
Lead Analyst and Research Partner

Ashwin Gaidhani has over 22 years of experience as an SME, advisor, practitioner and researcher in ESM and emerging technologies. He has worked as a global practice leader and an executive level advisor in ESM, automation and cloud technologies, covering business transformation, ITES & ITIS, AIOps, CloudOps, metrics-driven practices. As an ISG Lead Analyst and research partner for studies related to hyperscalers such as AWS and Google, ESM services and platforms, and intelligent automation, he defines and leads the ISG Provider Lens® research projects for the markets in the U.S. and Europe.

With his extensive experience in service management, Ashwin has worked in technology operations, business consulting and advisory roles for large Global System Integrators (GSIs), independent software vendors (ISVs) and technology services companies. He is highly qualified and experienced in offering guidance on technology practice adoption across industries such as BFSI, manufacturing and retail.

Research Analyst



Arnab Das
Research Analyst

Arnab is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens studies like Oil & Gas, ServiceNow and Workday respectively. He supports the lead analysts in the research process and authors the enterprise context and global summary reports with market trends and insights. He carries out research delivery for both primary and secondary research capabilities. Arnab comes with 3 years of experience across business, technology and academic research and writing.



Author and Editor Biographies



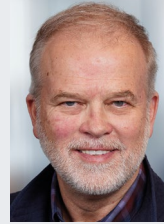
Study Sponsor

Heiko Henkes
Director and Principal Analyst, Global IPL Content Lead

Heiko Henkes serves as Director and Principal Analyst at ISG, overseeing the Global ISG Provider Lens® (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as a strategic program manager and thought leader for IPL lead analysts.

Henkes heads Star of Excellence, ISG's global customer experience initiative, steering program design and its integration with IPL and ISG's sourcing practice. His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding of continuous transformation, IT competencies, sustainable business

strategies and change management in a cloud-AI-driven business landscape. Henkes is known for his contributions as a keynote speaker on digital innovation, sharing insights on using technology for business growth and transformation.



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.



Provider Lens®

The ISG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners. ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this [webpage](#).

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The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.





SEPTEMBER, 2026

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