

NEAT EVALUATION FOR INFOSYS:

ServiceNow Services

Market Segment: Overall

Introduction

This is a custom report for Infosys presenting the findings of the 2025 NelsonHall NEAT vendor evaluation for *ServiceNow Services* in the *Overall* market segment. It contains the NEAT chart of vendor performance, a summary vendor analysis of Infosys, and the latest market analysis summary.

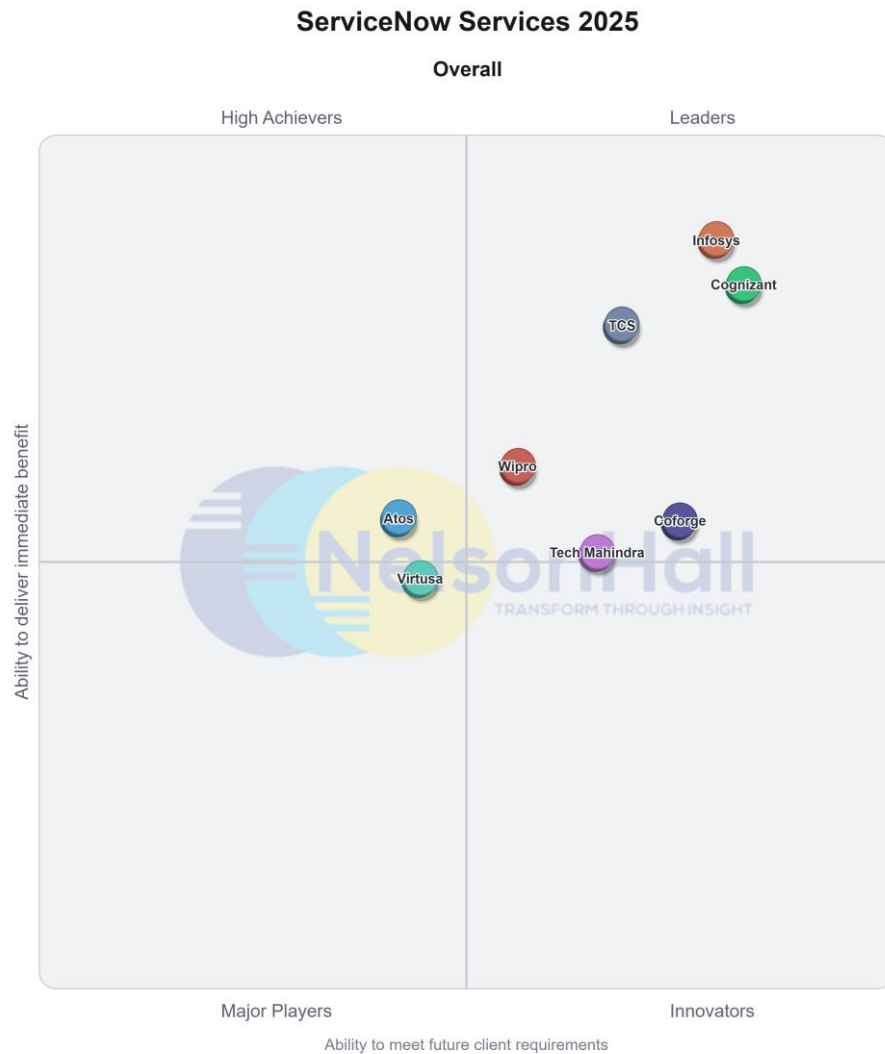
This NelsonHall Vendor Evaluation & Assessment Tool (NEAT) analyzes the performance of vendors offering ServiceNow services. The NEAT tool allows strategic sourcing managers to assess the capability of vendors across a range of criteria and business situations and identify the best performing vendors overall and with specific capability in technology workflow services, customer & industry workflow services, employee workflow services, and creator workflow services..

Evaluating vendors on both their ‘ability to deliver immediate benefit’ and their ‘ability to meet client future requirements’, vendors are identified in one of four categories: Leaders, High Achievers, Innovators, and Major Players.

Vendors evaluated for this NEAT are: Atos, Coforge, Cognizant, Infosys, TCS, Tech Mahindra, Virtusa, and Wipro.

Further explanation of the NEAT methodology is included at the end of the report.

NEAT Evaluation: Overall



NelsonHall has identified Infosys as a Leader in the *Overall* market segment, as shown in the NEAT chart. This market segment reflects Infosys' overall ability to meet future client requirements as well as delivering immediate benefits to its ServiceNow services clients.

Leaders are vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements.

Buy-side organizations can access the *ServiceNow Services* NEAT tool [here](#).



Vendor Analysis Summary for Infosys

Overview

Infosys is one of six Global Elite ServiceNow partners, with capabilities in Reseller, Service Provider, Consulting, Implementation, and Build.

Infosys operates a self-contained ServiceNow practice with P&L ownership and dedicated teams across practice sales, presales, delivery, license management, marketing, and a CoE cutting across capabilities and industries. The CoE is responsible for developing offerings, maintaining low-code/no-code assets, and building industry solutions.

Key geographies such as North America, Europe, and APAC have dedicated engagement partners who lead the relationships for clusters of key clients. Delivery teams are organized by industry verticals to align with sector-specific requirements. Additionally, Infosys has created a team to invest in emerging capabilities, such as AR/VR, sentiment analysis, AI analytics, and AI-driven automation, to expand the scope of its ServiceNow-based solutions. It has dedicated teams for its Infosys Enterprise Service Management Café (ESM Café) offering and is growing its partner ecosystem.

Infosys ESM Café is a set of pre-built applications and templates developed on ServiceNow to speed up implementations and reduce customization. It includes around 70 reusable components across IT and business functions.

In October 2020, Infosys acquired GuideVision, a ServiceNow Elite Partner based in Europe. The acquisition expanded Infosys' presence in nearshore locations like the Czech Republic, Hungary, Poland, Germany, and Finland. GuideVision's proprietary tool, SnowMirror, a ServiceNow data replication solution, was integrated into Infosys' offerings.

Infosys ServiceNow services cover:

- *Software and services*, where Infosys provides licenses, platform support, and enhancements
- *Implementation and support*, where the client owns the licenses, and Infosys provides implementation and support for the platform
- *Consulting*, where the client owns the licenses and manages the implementation. Infosys provides advisory services with SME support.

Infosys has ~3,800 ServiceNow resources, ~2,400 of which are based offshore and near-shore and ~1,400 onshore. It has 350 ServiceNow clients, including Bayer, Cathay Pacific, Eon Energy, AECOM, and OneNZ.

The company positions its Infosys ESM Café (and its industry offering) as accelerators to clients. It highlights the commonality of client requirements for specific workflows, which can be addressed through these offerings with add-ons and customizations for any remaining unaddressed needs.

Financials

Infosys reported annual revenue of \$19.3bn for the fiscal year ending March 31, 2025. NelsonHall estimates Infosys' ServiceNow practice revenues to be \$600m in FY 2025.

Strengths

- **Offering:** Infosys ESM Café stands out as a differentiator due to its role as an accelerator for ServiceNow implementations and its wide coverage of use cases, with its extensive pre-built library of assets. Its broad adoption and ability to generate value as a standalone IP highlight its maturity and impact within the ServiceNow ecosystem
- **ServiceNow practice structure:** having a dedicated ServiceNow practice with P&L responsibility and its own sales team enables Infosys to operate with clear accountability, faster decision-making, and tighter alignment between sales and delivery
- **Customer and industry offerings:** Infosys maintains a diversified client base across industries, reducing its vulnerability to sector-specific disruptions. This balanced exposure, combined with focused investments in verticalized customer workflows, strengthens its resilience and ability to deliver tailored solutions
- **Talent management:** Infosys has proactively addressed the ServiceNow talent shortage through a multi-pronged strategy. It was among the first to sign an ETA with ServiceNow, leverages DEI programs, hires domain specialists such as lawyers for Legal Service Delivery use cases, reskills existing talent from other platforms, and recruits locally through innovation hubs near client sites.

Challenges

While Infosys has a healthy onshore-offshore ratio compared to peers, it has limited resources in nearshore locations like LATAM and Eastern Europe, which can lead to language, cultural, and occasional regulatory challenges, especially in multi-region deals.

Strategic Direction

- **AI-first:** building on its own experience of a large internal GenAI-based ServiceNow implementation, Infosys has created a dedicated program to infuse GenAI across all ServiceNow workflows and to increase adoption at its large clients
- **Industry automation:** Infosys is directing investments towards non-technology workflows like industry and sub-industry use cases for manufacturing, banking, and telecom under its industry suite of offerings. Most offerings address complex landscapes and compliance mandates, positioning Infosys in a critical yet underserved whitespace in most industries. This industry focus has seen revenues from non-IT workflows grow to nearly half of its overall ServiceNow revenues in the last three years
- **Accelerated delivery:** Infosys highlights its ability to accelerate ServiceNow engagements using pre-built assets, standardized frameworks, automation tools from its Infosys ESM Café, and domain-specific solutions
- **Infosys as a test bed:** Infosys uses its large workforce (~350k) as a test bed before formalizing new offerings. Examples of this approach include one of the largest GenAI (NowAssist) HRSD implementations internally, a diversity portal built on ServiceNow for its workforce, and the Infosys Legal Services offering, which was first implemented in its legal department.



Outlook

NelsonHall anticipates Infosys' continued investments in non-technology workflows with a focus on use cases such as ESG, governance, HR, and supply chain.

We can expect to witness a continued infusion of GenAI capabilities across workflows and processes, including CSM, FSM, HRSD, and LSD. NelsonHall expects Infosys' continued investment in what it terms 'Horizon 3' offerings. These are currently at an early exploratory stage on IoT-based automation, GenAI use cases, AR/VR, data monetization, and new ESG use cases.

Infosys has set ambitious revenue targets for its ServiceNow practice. NelsonHall anticipates potential M&A activity in the space, possibly towards pure-play ServiceNow providers with niche capabilities in industry workflows.

ServiceNow Services Market Summary

Overview

ServiceNow, an ISV that provides a cloud-based workflow management platform, has rolled out multiple horizontal and vertical products covering processes across the enterprise. In recent years, ServiceNow has transitioned from being focused on IT service management (ITSM) and incident handling into a platform supporting multiple enterprise workflows using internal enhancements, partner integrations, and strategic acquisitions.

Its strategic shift in positioning beyond ITSM into broader enterprise workflows (customer service, HR, procurement, and operations) has seen ServiceNow become increasingly competitive with platforms like Salesforce in some enterprise functions and complementary to ERP systems for workflow automation.

Enterprises are using ServiceNow to unify fragmented operations across IT and business functions. Vendors are responding with domain-aligned offerings and accelerators across all workflow types.

Two trends are reshaping ServiceNow services:

- Rising demand for industry-specific and customer-facing workflows, especially in regulated sectors, which requires deeper domain expertise
- GenAI integration across the platform, enabling use cases like content generation, agentic automation, and faster workflow design.

ServiceNow is increasingly being used to support customer- and employee-facing workflows, which is raising demand for certified talent and closer coordination with business teams.

While offshore delivery remains the norm, some workflows now require more onshore involvement. Going forward, vendors will need to integrate AI capabilities with industry expertise and robust delivery execution to remain competitive.

Buy-Side Dynamics

The key drivers for buyers of ServiceNow services are:

- To achieve operational efficiency and automation
- **Modernization:** instead of rewriting heavily customized modules, ServiceNow is used to create modern, user-friendly interfaces that interact with the core ERP backend, preserving logic but improving experience
- **Improving user experience:** by creating consistent user-friendly experiences for employees and customers across departments
- **Accelerating implementation:** faster go-live is becoming a selection criterion, especially for clients with fixed budgets or deadlines.



Market Size & Growth

The global ServiceNow professional services market is estimated to be worth ~\$9.1bn in 2024. Spending will reach ~\$16.2 billion by 2027, a 21% CAGR (2024-27), driven by expansion beyond IT workflows into customer, industry, and employee-facing use cases.

Growth will be led by North America, as well as sectors such as BFSI and healthcare. The fastest growth is expected to come from customer and industry workflows, which are projected to outpace technology workflows through 2027.

Agentic AI and GenAI capabilities embedded in ServiceNow will drive a new wave of demand from 2025, especially for experience-led and autonomous workflow deployments.

Success Factors

Key vendor success factors for ServiceNow services are:

- **Selling beyond IT to business functions:** vendors must show they can drive outcomes beyond IT, as clients now use ServiceNow across business domains like procurement and finance. Without domain expertise and industry-aligned solutions, vendors risk being seen as limited to legacy ITSM work
- **Evolving AI and data capabilities:** ServiceNow is shifting to an AI-driven operations platform, requiring vendors to support strong data architecture, governance, and readiness across integrated workflows
- **Accelerator assets and IP:** clients expect faster, standardized implementations using reusable assets and IP, pushing vendors to deliver with accelerators that improve speed and predictability
- **Overcoming talent constraints:** vendors face a shortage of experienced, cross-trained ServiceNow talent, with certification alone falling short amid high attrition and fast release cycles, risking delays and inconsistent delivery.

Outlook

The total addressable market for ServiceNow will grow beyond IT to encompass workflows across the enterprise value chain, from suppliers to employees and customers. Organizations will utilize ServiceNow for industry and sub-industry use cases with AI capabilities integrated.

The key adoption drivers will be:

- NowAssist's integration across workflows
- Domain-specific data models
- Consistent experience across customer and employee workflows
- Autonomous IT operations driven by GenAI agents and self-healing infrastructure
- Expansion in geographies such as Australia, Japan, India, and the Middle East.



NEAT Methodology for ServiceNow Services

NelsonHall's (vendor) Evaluation & Assessment Tool (NEAT) is a method by which strategic sourcing managers can evaluate outsourcing vendors and is part of NelsonHall's *Speed-to-Source* initiative. The NEAT tool sits at the front-end of the vendor screening process and consists of a two-axis model: assessing vendors against their 'ability to deliver immediate benefit' to buy-side organizations and their 'ability to meet future client requirements'. The latter axis is a pragmatic assessment of the vendor's ability to take clients on an innovation journey over the lifetime of their next contract.

The 'ability to deliver immediate benefit' assessment is based on the criteria shown in Exhibit 1, typically reflecting the current maturity of the vendor's offerings, delivery capability, benefits achievement on behalf of clients, and customer presence.

The 'ability to meet future client requirements' assessment is based on the criteria shown in Exhibit 2, and provides a measure of the extent to which the supplier is well-positioned to support the customer journey over the life of a contract. This includes criteria such as the level of partnership established with clients, the mechanisms in place to drive innovation, the level of investment in the service, and the financial stability of the vendor.

The vendors covered in NelsonHall NEAT projects are typically the leaders in their fields. However, within this context, the categorization of vendors within NelsonHall NEAT projects is as follows:

- **Leaders:** vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements
- **High Achievers:** vendors that exhibit a high capability relative to their peers to deliver immediate benefit but have scope to enhance their ability to meet future client requirements
- **Innovators:** vendors that exhibit a high capability relative to their peers to meet future client requirements but have scope to enhance their ability to deliver immediate benefit
- **Major Players:** other significant vendors for this service type.

The scoring of the vendors is based on a combination of analyst assessment, principally around measurements of the ability to deliver immediate benefit; and feedback from interviewing of vendor clients, principally in support of measurements of levels of partnership and ability to meet future client requirements.

Note that, to ensure maximum value to buy-side users (typically strategic sourcing managers), vendor participation in NelsonHall NEAT evaluations is free of charge and all key vendors are invited to participate at the outset of the project.



Exhibit 1

'Ability to deliver immediate benefit': Assessment criteria

Assessment Category	Assessment Criteria
Offering	<ul style="list-style-type: none"> Advisory and consulting services Implementation services Managed services Technology Workflow services Employee Workflow services Customer and industry Workflow services Creator Workflow services
Delivery	<ul style="list-style-type: none"> ServiceNow North America delivery capabilities ServiceNow EMEA delivery capabilities ServiceNow APAC delivery capabilities ServiceNow LatAm delivery capabilities Team expertise, CTAs, CMAs, CIS Dedicated GenAI / NowAssist CoEs
Presence	<ul style="list-style-type: none"> Scale of Ops - Overall Scale of Ops - NA Scale of Ops - EMEA Scale of Ops - APAC Scale of Ops -LatAm Number of clients overall for ServiceNow
Benefits Achieved	<ul style="list-style-type: none"> Level of cost savings achieved Timely implementation Improved access to next-generation ServiceNow capabilities Increased end-user/business satisfaction Improved Service Management



Exhibit 2

‘Ability to meet client future requirements’: Assessment criteria

Assessment Category	Assessment Criteria
Overall Future Commitment to ServiceNow Services	Financial Security Market Momentum
Investments in ServiceNow Services	Investment in AI capabilities including NowAssist and GenAI Investments in IPs and accelerators in support of Technology Workflows Investments in IPs and accelerators in support of Employee Workflows Investments in IPs and accelerators in support of Customer and Industry Workflows Investments in IPs and accelerators in support of Creator Workflows
Ability to Partner and Evolve Services	Strength of ServiceNow Partnership Strength of partner ecosystem

For more information on other NelsonHall NEAT evaluations, please contact the NelsonHall relationship manager listed below.



research.nelson-hall.com

Sales Inquiries

NelsonHall will be pleased to discuss how we can bring benefit to your organization. You can contact us via the following relationship manager:
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