

# Magic Quadrant for Service Integration and Management Services

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Cloud computing, AI and automation are reshaping IT services, driving organizations to outsource SIAM to streamline operations and reduce complexity. Sourcing, procurement and vendor management leaders can use this research to evaluate the execution and strategic vision of global SIAM providers.

## Market Definition/Description

SIAM refers to the provision of technology consulting, project implementation and operational management services across IT and business process service providers, internally and externally. These services coordinate, integrate service delivery and align service management processes. SIAM aims to achieve seamless end-to-end service outcomes with a single point of accountability in a multisourced IT services environment. SIAM services can be delivered internally; however, we cater to SIAM functions delivered by external SIAM providers. SIAM is typically used in multisourced infrastructure and application outsourcing initiatives. It also applies to business process outsourcing (BPO) and can integrate other business functions, like finance and HR.

Consumers of service integration and management (SIAM) who want to achieve seamless end-to-end service outcomes from the SIAM provider relinquish the responsibility of managing service delivery quality, resulting in a hybrid IT services ecosystem.

A SIAM provider is usually a third party contracted by an organization to act as its agent for governing and managing services and sources. This operates in an environment that uses a

neutral third party (internal and external) for IT and business process services delivery. The SIAM provider has a direct contractual relationship with the organization, rather than with the external sources engaged (as it would under a prime or general contractor arrangement).

The outcome of SIAM may vary from organization to organization but should focus on at least the following:

- Improved delivery excellence and operational efficiency
- End-to-end governance
- Improved experience
- Improved service velocity
- Better alignment with business outcomes
- Transparent and centralized reporting, and monitoring of all IT service delivery
- Improved and accurate asset and configuration management
- Improved change management outcomes
- Clear and actionable root cause analyses (RCAs)

## **Mandatory Features**

The must-have capabilities for this market include:

- Mature framework for delivering SIAM services with provider management expertise
- SIAM-specific performance dashboard and reporting with the capability to monitor, track, enhance and innovate SIAM capabilities
- SIAM-specific tools and platforms that support the federation of multiple managed service provider (MSP) tools
- Coordination and planning expertise between IT service providers, toolsets and messaging and the ability to drive collaboration and cultural improvement in a multivendor ecosystem
- A clear delineation between SIAM services and any other IT service provided

- Major incident management, change and release management practices, processes and accountability
- Contractual commitments to outcomes, defining expectations that align to the business outcome realization
- The ability to monitor, track and report on SLAs, XLAs, outcomes, etc.

## Common Features

The common features for this market include:

- Lean integrated ITIL processes that support a hybrid digital environment
- Federated service configuration management
- Federated monitoring and observability tooling
- Federated service catalog
- Certifications with respect to SIAM services

## Magic Quadrant

Figure 1: Magic Quadrant for Service Integration and Management Services





Gartner

## Vendor Strengths and Cautions

### Accenture

Accenture is a Leader in this Magic Quadrant. It has provided SIAM offerings for over 16 years. Its top three SIAM service verticals are telecommunications, manufacturing and financial services. Accenture differentiates its SIAM services by positioning itself as a reinvention partner and using a cohesive AI architecture that connects workflows, data and knowledge. This architecture highlights ethical AI and prioritizes human welfare in all AI development and deployment aspects.

*Accenture declined requests for supplemental information. Gartner's analysis is therefore based on other credible sources.*

## *Strengths*

- **Innovation and integration of emerging technologies:** Accenture heavily invests in innovation, and has integrated emerging technologies such as AI, machine learning (ML), robotic process automation (RPA), generative AI (GenAI) and agentic AI into its SIAM solutions. This focus on disruptive technologies helps clients improve efficiency, make informed decisions and reduce operational costs. Accenture's proactive approach to technology adoption ensures that clients benefit from transformative solutions that deliver business value.
- **Global scale and comprehensive service portfolio:** Accenture offers customized SIAM approaches tailored to various industries, including an end-to-end service portfolio (strategy, design, transition, operations and continuous improvement), delivered through an integrated operating model combining capability and understanding of SIAM services. This approach makes Accenture a trusted partner for organizations seeking transformative SIAM solutions worldwide.
- **Mature methodologies and tailored frameworks:** Accenture utilizes industry-specific SIAM frameworks and measures return on value and outcome-based governance methodologies, tailored to client needs, and has strong partnerships with major technology vendors (e.g., ServiceNow, Microsoft, Amazon Web Services). Seamless SIAM tool integration and platforms enhance clients' automation and reporting, and provide real-time service visibility. This proven approach consistently drives superior outcomes.

## *Cautions*

- **Cost and complexity:** As a premium consulting provider, Accenture's services can be perceived as costly and less accessible for midsize organizations. Its solutions can be overly complex for smaller organizations or those with straightforward needs. For potential clients primarily seeking quick cost cuts, Accenture's focus on transformational value over basic cost reduction may be less suitable.
- **Extended timelines and change management challenges:** Accenture's approach, particularly in large or highly customized client environments, can lead to extended SIAM implementation timelines. SIAM transformations often require significant cultural and organizational change, and Accenture's methods may not always sufficiently address

stakeholder alignment and change management. Clients should carefully evaluate whether these methods will meet their specific needs to ensure higher rates of adoption by stakeholders.

- **Strategic agility and responsiveness:** Accenture's services may be slow to adapt to certain client-driven changes, such as an unplanned integration of new vendors, and may require additional planning to ensure seamless execution, which could impact responsiveness to rapidly evolving client demands within its SIAM offerings. Clients seeking agility and flexibility are encouraged to discuss their specific requirements with Accenture.

## **Capgemini**

Capgemini is a Leader in this Magic Quadrant. It has provided SIAM offerings for 17 years. Its top three SIAM service verticals are energy and utilities, financial services, and the public sector. Capgemini differentiates itself by delivering SIAM services that focus on generating real, measurable business value for clients, extending beyond traditional IT operations.

### *Strengths*

- **Robust maturity model and structured roadmap:** Capgemini consistently utilizes a progressive and robust maturity model and structured roadmap. This model helps it understand a client's current state and establish a unique roadmap for its transformation journey, meeting clients where they are in their SIAM journey.
- **Strong public-sector focus and expertise:** Capgemini continues to exhibit a solid understanding of the regulatory and compliance demands within the public sector, which it offers to clients globally. This understanding is supported by a substantial client base and strong offerings, including integrating sustainability reporting.
- **Focus on large engagements with high client satisfaction:** Capgemini manages over 1,000 active multiregion SIAM engagements globally, particularly targeting large corporations and public-sector clients with complex, multisupplier environments. Capgemini has reported a high client renewal rate for SIAM customers, which indicates client satisfaction.

### *Cautions*

- **Not suited for cost-focused buyers:** For its SIAM offerings, Capgemini does not target clients that prioritize immediate cost reduction or those with minimal investment

appetites. Its vision and approach are designed for clients with significant transformational expectations and that are ready to invest in modernization initiatives.

- **Limited contractual commitment to innovation:** Capgemini has the lowest percentage of SIAM engagements, which include contractual innovation, transformation or continuous improvement commitments, among the evaluated service providers. Additionally, its examples of business outcomes are generally standard operational results rather than industry-specific business outcomes, which suggests a perceived lack of accountability.
- **Limited transparency on staff attrition:** Unlike most vendors that disclose attrition details for staff dedicated to SIAM services, Capgemini does not provide this information. This absence of detailed disclosure may raise concerns for clients that require clear insight into the stability and continuity of the workforce supporting their services. This can impact their ability to assess potential risks related to staff turnover and the ongoing quality of service delivery.

## CGI

CGI is a Niche Player in this Magic Quadrant. It has provided SIAM offerings for over nine years. Gartner has verified that CGI operates in at least three verticals: telecommunications, public sector, and financial services. CGI differentiates itself by its breadth of capabilities, being able to deliver SIAM as a stand-alone offering or part of broader service delivery.

*CGI declined requests for supplemental information. Gartner's analysis is therefore based on other credible sources.*

### Strengths

- **Data-driven SIAM platform strategy:** CGI's platform provides clients with user-centric service integration solutions supported by advanced data analytics. Organizations that have adopted, or are considering adopting, a data-driven SIAM strategy may find this offering particularly appealing, as it enables them to optimize their service delivery, improve operational efficiency and make more informed decisions based on actionable insights derived from data.
- **Significant footprint in Europe and North America:** CGI has established a significant SIAM footprint in Europe and North America. This presence enables CGI to respond swiftly to client needs, adapt to market trends in Europe and North America, and foster long-term client relationships across both regions.

- **Breadth of services:** CGI can deliver on various SIAM models, encompassing consulting and advisory services and fully managed service offerings. This breadth of capability underpins its ability to effectively serve clients' diverse and evolving needs, regardless of their level of SIAM maturity.

### Cautions

- **Limited specialized SIAM expert reach:** CGI may have limited availability of specialized SIAM experts or resources, depending on the region and industry. Clients in niche sectors or remote locations might experience constraints in accessing the full breadth of CGI's SIAM capabilities.
- **Heavy offshore reliance:** CGI maintains a business model that is heavily reliant on offshore delivery centers for the execution of many client projects and operational functions. This significant emphasis on offshore resources can present challenges for clients specifically seeking a nearshore strategy, as it may prioritize closer geographic proximity, time zone alignment and cultural affinity in its service delivery partners.
- **Standardization versus customization:** CGI may favor standardized approaches to SIAM, prioritizing efficiency, consistency and streamlined processes across engagements. While this method can deliver benefits, it may not fully accommodate the unique requirements or specific preferences of clients seeking highly customized SIAM solutions tailored to their individual business environments.

### Cognizant

Cognizant is a Visionary in this Magic Quadrant. It has provided SIAM offerings for 15 years. Its top three SIAM service verticals are health and life sciences, retail and e-commerce, and energy and utilities. Cognizant differentiates itself by utilizing a mature and established framework, SIAMNXT, which is rooted in global market experience and industry best practices designed to accelerate SIAM time to value.

### Strengths

- **Leveraging the SIAM maturity model:** Cognizant utilizes a robust maturity model that incorporates industry best practices and is supported by a significant number of SIAM-certified professionals. This maturity model is designed to assist customers at all stages of their SIAM service journey, ensuring a structured and effective service integration and management approach.

- **Strong focus on achieving business outcomes:** Cognizant demonstrates a good understanding of and track record in helping clients achieve specific business outcomes through its SIAM services. The company focuses on empowering clients to achieve business value and elevate their overall experience, emphasizing collaboration that goes beyond traditional SLAs.
- **Effective governance model promoting SIAM objectivity:** Cognizant's execution is strengthened by its comprehensive governance approach, including a joint accountability governance model. This organizational structure is designed to ensure objectivity and trust across multivendor ecosystems, while its governance model is a preferred method to prevent bias or conflict of interest.

### *Cautions*

- **Strategic growth ambitions:** Cognizant has set highly ambitious growth targets for the next five years, including a goal of reaching \$1 billion in revenue from SIAM services by 2030. While this signals a strong intent to secure larger SIAM engagements, it could potentially result in less accountability or a shift of certain risks and responsibilities onto clients. Clients should remain vigilant regarding potential risks and ensure robust oversight mechanisms are in place to safeguard service quality.
- **Predominance of traditional pricing models:** Cognizant predominantly uses traditional pricing models such as fixed price and time and materials (T&M). Potential clients looking for more innovative pricing models that align with shared risk and reward structures should consider Cognizant's pricing structure carefully.
- **SIAM offerings concentrated on IT services:** Although Cognizant's SIAM portfolio includes offerings for domains beyond IT, such as HR services and finance operations, it has not traditionally targeted these areas and they may not be a strategic priority for the vendor. Its maturity framework is robust, but tactical, in these areas, which may not be a good fit for clients seeking a more strategic SIAM approach.

### **DXC Technology**

DXC Technology (DXC) is a Challenger in this Magic Quadrant. It has provided SIAM offerings for over 16 years. Its top three SIAM service verticals are energy, manufacturing and transportation. DXC differentiates itself through the co-solutioning SIAM approach, fostering more effective collaborative partnerships.

## *Strengths*

- **Business-outcome-oriented and value-driven approach:** DXC aligns IT services directly with its clients' strategic business goals, aiming to deliver measurable improvements in their specific industry or business operations. This approach helps clients see tangible value from their SIAM engagement beyond traditional IT metrics, potentially improving their overall business performance.
- **Co-solutioning collaborative SIAM partnerships:** DXC reported a high percentage of SIAM engagements that incorporate elements co-created with the customer. This means that clients actively participate in designing solutions to meet their needs, resulting in more effective, collaborative partnerships and enhanced satisfaction through customized service integration strategies.
- **Mature operational model:** DXC's SIAM service provides a consistent and unified framework to manage multivendor ecosystems across diverse geographical locations. This allows organizations to integrate and coordinate multiple service providers, ensuring consistent quality regardless of location, which is crucial for global companies managing international operations and compliance.

## *Cautions*

- **Workforce optimization needs:** Clients may experience limitations in DXC's direct delivery capabilities from dedicated SIAM staff for SIAM services. While DXC's use of full-stack resources may offer flexibility, the absence of dedicated SIAM staff could limit the depth of specialized SIAM expertise available to clients. This could potentially impact the consistency and scalability of service delivery, especially for global organizations with complex integration needs.
- **Deficiency of accountability for outcomes:** DXC's contracts should include motivational clauses to ensure accountability for consistently achieving desired outcomes, as the vendor's SIAM engagements currently lack incentives and penalties tied to end-to-end outcomes. Clients should consider integrating financial incentives and penalties into their SIAM contracts to drive desired behaviors, improve accountability and motivate DXC to deliver optimal end-to-end outcomes.
- **Low adoption of centralized integrated dashboards:** Clients may experience insufficient comprehensive, real-time visibility and transparency across their multivendor IT ecosystem due to low adoption of DXC's integrated dashboards. This could lead to

challenges in monitoring performance, managing processes and gaining a unified view of their SIAM operations.

## HCLTech

HCLTech is a Leader in this Magic Quadrant. It has solid experience in the SIAM market, having provided these services for 13 years. Its top three SIAM service verticals are manufacturing, retail and healthcare. HCLTech differentiates itself by delivering measurable value within the first 12 months of implementing its SIAM solutions, reducing high-priority incidents, automating over 35% of service tasks and increasing configuration management database (CMDB) accuracy.

### Strengths

- **Comprehensive and structured SIAM offerings:** HCLTech continues to offer a well-balanced portfolio of comprehensive SIAM offerings, including advisory, operations, design and build, orchestration, and SIAM training. These services are supported by robust presales assessments, which help ensure a standardized approach to SIAM.
- **Strong vision and roadmap for AI-driven analytics:** HCLTech demonstrates a solid roadmap evolving toward AI-driven analytics, with proactive commitment to deploying GenAI and enhancing SIAM offerings with advanced AI capabilities. This includes plans to incorporate agentic AI use cases as the technology matures.
- **Seamless transitioning to SIAM environment:** HCLTech specializes in transitioning clients from legacy, siloed IT setups to integrated SIAM models. Its proven methodologies minimize disruption during migration, and its dedicated transition teams ensure continuity of business operations while integrating new service providers and technologies.

### Cautions

- **Limited penetration in midsize enterprise market:** Despite HCLTech's stated strategic focus on building solutions for midsize clients, its percentage of current SIAM midsize customers is significantly below the average compared to other service providers in this Magic Quadrant. This indicates that HCLTech is still in the initial stages of establishing a presence in the midsize client market.
- **Challenges in operational efficiency:** HCLTech shows areas for improvement in service delivery and operational efficiency, as evidenced by a lower percentage of incidents

managed within agreed-on SLAs compared to its industry peers. This is coupled with one of the highest employee attrition rates among all the service providers evaluated in this research. Both factors indicate potential challenges in maintaining consistent service standards.

- **SIAM-as-a-Service offering terms and conditions transparency:** Clients must conduct thorough due diligence on HCLTech's SIAM-as-a-service offering terms, including service scope, shared responsibilities and pricing models. Insufficient clarity may result in unforeseen costs, restricted subscription flexibility or potential vendor lock-in.

## **Infosys**

Infosys is a Challenger in this Magic Quadrant. It has provided SIAM offerings for 17 years. Its top three SIAM service verticals are manufacturing, retail and finance. Infosys differentiates itself by its global reach in consulting, advisory and managed services for SIAM through its NextGen SIAM offerings.

### *Strengths*

- **Advanced agentic AI roadmap:** Infosys' strategic roadmap centers on developing its agentic AI orchestrator SIAM framework, designed to seamlessly integrate all service domains, leveraging Infosys's NextGen SIAM capabilities and embedding advanced technologies like GenAI and agentic. This approach includes numerous automation and workflow initiatives as part of its transformation for SIAM engagements.
- **Operational performance:** Infosys has consistently delivered robust outcomes across key operational metrics, as evidenced by its track record of meeting end-to-end SLA targets and driving productivity improvements. Furthermore, the company's extensive experience managing multiple vendors is highlighted by its ability to maintain an optimal average number of vendors involved in each engagement, ensuring streamlined operations.
- **Strategic partnerships:** Infosys fosters strategic partnerships with industry leaders like Scopism, ServiceNow, EXIN, Celonis and BMC. These partnerships enhance knowledge, improve customer experience and support Infosys' comprehensive service integration offerings with its SIAM maturity model.

### *Cautions*

- **Legacy pricing models:** Infosys primarily adopts traditional pricing models like T&M and fixed price, with most SIAM engagements utilizing these approaches over other models. This conflicts with its transformational approach; clients looking for transformation should request nontraditional pricing models that favor outcomes.
- **Heavy reliance on offshore delivery:** Infosys continues to primarily operate from offshore delivery centers, with SIAM business in regions like the Americas and EMEA predominantly (90%) supported by a workforce located in the Asia/Pacific region. This can be a challenge for clients in certain geographies that are cautious about offshore outsourcing or seeking local SIAM delivery.
- **Lower rate of co-solutioning in engagements:** Infosys reports that a low percentage of its current SIAM engagements are based on co-solutioning. This percentage is below average compared to other service providers in this research, which could reflect a less interactive approach to designing solutions with clients.

## Kyndryl

Kyndryl is a Visionary in this Magic Quadrant. It has provided SIAM offerings for eight years. Its top three SIAM service verticals are banking and financial services, travel and transportation, and energy and utilities. Kyndryl differentiates itself through its advanced AI and automation capabilities embedded in its Kyndryl Bridge platform.

### *Strengths*

- **Strong market understanding:** Kyndryl demonstrates a good understanding of the SIAM market, presenting a clear vision and roadmap for its evolution over the next three years, which includes balancing customer business outcomes with the day-to-day management of multivendor ecosystems, and reflects a strong, evolving vision for transformation.
- **Focus on experience and value-based KPIs:** Kyndryl is preparing to shift toward user-centric models prioritizing intuitive and responsive service experiences, often measured through experience-level agreements (XLAs) and real experience metrics. It also utilizes total cost of consumption (TCC) and return on value KPIs as differentiators, providing customers with a better view of how their business objectives are being achieved.
- **SIAM enhanced by institutional partnerships:** Kyndryl maintains robust partnerships with recognized institutions specializing in SIAM and experience management, such as Scopism and the XLA Institute. These collaborations enable Kyndryl to provide greater

leadership and guidance within SIAM communities. In addition, Kyndryl works closely with leading service management providers, including ServiceNow, GLPI and BMC, further strengthening its capabilities in the field.

## Cautions

- **Minimal engagement in build-operate-transfer (BOT) model:** Kyndryl's BOT as an engagement model has very low adoption, with only 1% of deals following this approach. Clients increasingly seek ways to govern and manage independently in a SIAM environment, and a BOT model supports this objective. Kyndryl's limited experience and focus in this area may not align with the needs of clients seeking this model.
- **Lack of dedicated SIAM staffing:** Despite an investment in dedicated SIAM staff and the creation of a new business unit dedicated to SIAM, there is a lack of transparency regarding the exact numbers of dedicated SIAM staff or how this unit is staffed for delivery and future growth. This makes it challenging for potential clients to assess Kyndryl's capacity and resource commitment.
- **Limited contractual accountability:** Kyndryl has the lowest percentage of contractually committed SIAM deals, including incentives and penalties, among the other service providers in this Magic Quadrant. This business decision can indicate a lower inclination to make hard contractual commitments to outcomes promised during the sales process.

## LTIMindtree

LTIMindtree is a Visionary in this Magic Quadrant. It has provided SIAM offerings for over eight years. Its top three SIAM service verticals are banking and financial services, high tech, and hospitality. LTIMindtree differentiates itself by leveraging its CloudXperienz platform, which facilitates efficient supplier integration and enhances performance across organizational processes.

## Strengths

- **Strong operational execution and dedicated SIAM focus:** LTIMindtree maintains a strong focus on and commitment to operational excellence in service integration and management. Its core SIAM processes are efficient, well-governed and consistently optimized. LTIMindtree has a considerable team of dedicated SIAM personnel, allowing it to deliver tailored SIAM solutions that align with clients' complex service integration requirements and strategic business objectives.

- **Clear and continuous development roadmap:** LTIMindtree is strongly committed to growth and innovation, maintaining a comprehensive development roadmap for its SIAM services, deliverables and solution portfolio. This underscores the organization's proactive, forward-looking approach, such as leveraging its CloudXperienz platform to drive automation, enable efficient supplier integration and continually improve service delivery to meet evolving client and market needs.
- **Significant adoption of the BOT model:** LTIMindtree has seen widespread use of the BOT engagement model, with 35% of deals adopting this approach. Clients are increasingly interested in using the BOT model to independently manage and administer SIAM environments. LTIMindtree's experience and expertise in this area are well-aligned with the needs of clients seeking this model.

### Cautions

- **Heavy reliance on offshore delivery:** LTIMindtree relies mainly on offshore delivery, with its primary delivery centers concentrated in India. This approach, while cost-effective, may concern clients seeking strong onshore capabilities. The lack of a clear geographic expansion strategy suggests limited investment in developing localized expertise and infrastructure to support global client needs.
- **Low percentage of SIAM-certified staff:** Forty percent of LTIMindtree's SIAM technical staff possess formal SIAM certification, which falls short of the industry average of 60% among top service providers in this Magic Quadrant. This gap could influence the vendor's capability to provide top-tier SIAM solutions.
- **Low inclusion of performance-based incentives and penalties:** LTIMindtree includes performance-based incentives and penalties in only a small proportion of SIAM contracts. It is recommended that clients encourage greater alignment between LTIMindtree accountability and their objectives.

### Microland

Microland is a Niche Player in this Magic Quadrant. It has provided SIAM offerings for over 15 years. Its top three SIAM service verticals are manufacturing, banking and financial services, and energy and utilities. Microland differentiates itself through its proprietary agentic AI-powered platform, Intelligeni, which delivers observability across business processes, applications and IT infrastructure.

## *Strengths*

- **Robust conflict of interest (COI) mitigation:** Microland mitigates COI in its SIAM framework through rigorous organizational ring-fencing to create clear operational boundaries, independent governance structures to ensure objective oversight and clear contractual safeguards. These measures ensure effective management of COI, especially when Microland acts as both the SIAM provider and an IT tower vendor, assuring clients of integrity in complex multivendor environments.
- **Proprietary AI/automation platform:** Microland's Intelligeni platform provides SIAM clients with advanced AI and ML capabilities to automate incident and problem management processes. By streamlining IT operations through intelligent automation, Intelligeni boosts efficiency and operational autonomy, positioning clients for future AI-driven service management advancements.
- **Comprehensive unified dashboards and analytics:** Microland's SIAM offering includes an advanced, integrated dashboard and analytics platform that delivers granular control of multivendor IT environments. Its unified dashboards and dynamic vendor scorecards consolidate data, enabling stakeholders to monitor KPIs, evaluate vendor compliance and ultimately enhance operational efficiency.

## *Cautions*

- **Stagnant growth in stand-alone SIAM services:** Microland's integration of SIAM within its managed service portfolio has limited the growth of stand-alone SIAM engagements, making it less suitable for clients seeking pure-play SIAM. This focus restricts innovation and exposure to a broader spectrum of SIAM-only projects, impacting market agility and depth of experience in specialized SIAM implementations. Potential clients should evaluate Microland's pure-play SIAM capabilities to meet specialized stand-alone SIAM needs.
- **Modest market position and client suitability:** Compared to other service providers in this research, Microland has a modest market presence and limited brand awareness. While it targets larger enterprises, its service offerings and operational maturity are currently better-suited to midsize organizations. Large enterprises should assess Microland's maturity and ability to deliver SIAM services tailored to organizations of their scale.
- **Limited presence of strategic partnerships:** Microland has fewer strategic partnerships with industry-leading vendors than others evaluated in this research, which may limit its

ability to scale specialized SIAM solutions and access broader technical expertise. This could reduce co-innovation opportunities. Clients should evaluate Microland's ability to innovate and be competitive in a rapidly evolving market.

## Tata Consultancy Services

Tata Consultancy Services (TCS) is a Leader in this Magic Quadrant. It has provided SIAM offerings for 14 years. Its top three SIAM service verticals are retail, manufacturing, and life sciences and healthcare. TCS differentiates itself by taking a consulting-first approach to enable clients to define and accelerate their SIAM transformation journeys.

### Strengths

- **Extensive use of proprietary AI and automation frameworks:** TCS's extensive use of automated tasks and robust management that utilizes AI frameworks allows clients to anticipate increased operational efficiency and potential cost reductions (10% to 15% full-time equivalents [FTEs]). Leveraging advanced, integrated technologies enables faster service delivery and more-consistent outcomes.
- **Managing multivendor environments with centralized visibility:** TCS offers customers comprehensive oversight of their entire service ecosystem with its platform and dashboards, facilitating better decision making and performance monitoring across various vendors. This centralized visibility helps ensure SLAs are met and identifies areas for improvement within a complex IT landscape.
- **Focus on business outcomes:** SIAM services align with TCS's strategic business objectives, extending beyond traditional IT functions to areas like HR and business process services. TCS sees this as a strategic emphasis that can enhance value, especially for clients contracting for business outcomes.

### Cautions

- **Hybrid nature of SIAM offerings:** Clients may encounter challenges when evaluating TCS's SIAM offerings, as the available models can be complex and may not always be distinctly differentiated. This may prolong the decision-making process and increase the risk of selecting a service that does not fully align with the client's strategic objectives. Clients should review and seek clarification on the specific features and benefits of each SIAM model to ensure that the chosen solution best fits their organizational needs.

- **Low percentage of SIAM-certified technical staff:** Only 10% of TCS's staff hold SIAM-specific training and certification; this percentage is significantly lower than other service providers in this Magic Quadrant. While TCS is investing in its certified talent pool as part of its roadmap, this could result in less specialized guidance and expertise in complex SIAM implementations, potentially impacting the overall quality and effectiveness of the service.
- **Blurring of SIAM with broader managed services:** TCS's SIAM engagements frequently combine SIAM offerings with other service tower managed services, resulting in minimal adoption of purely stand-alone SIAM services. This can blur the lines between SIAM governance and general service management. Indeed, 90% of TCS's SIAM engagements involve it serving as both the SIAM provider and one or more other IT tower vendors within the same ecosystem. Prospective clients that desire a stand-alone SIAM service should challenge TCS to provide this offering.

## **Tech Mahindra**

Tech Mahindra is a Niche Player in this Magic Quadrant. It has provided SIAM offerings for over 13 years. Its top three SIAM service verticals are communications, banking and financial services, and manufacturing. Tech Mahindra differentiates itself by utilizing sustainability metrics, integrating eco-conscious practices, and tracking energy usage, carbon footprint and waste reduction to support green IT goals.

### *Strengths*

- **Expansion of centers of excellence and innovation:** Tech Mahindra is expanding its centers of excellence and innovation, investing in IT service management and integrating AI and automation technologies, such as AI-driven automation solutions and comprehensive workflow tools, across its SIAM offerings. This approach delivers value to SIAM services by fostering innovation.
- **Focus on SIAM consulting services:** Tech Mahindra tailors SIAM methodologies to meet client needs and maintains a higher proportion of consulting-only SIAM engagements than other service providers in this Magic Quadrant. Its SIAM portfolio includes consulting and BOT models, ensuring solutions align with client requirements.
- **Empowering data-driven decisions:** Tech Mahindra enhances its SIAM solutions with its proprietary analytics platform, Snoopy. This platform provides comprehensive real-time

health statistics and advanced forecasting, enabling data-driven decision making, operational efficiency and predictive analytics across various business verticals.

## Cautions

- **SIAM roadmap immaturity:** Key elements of Tech Mahindra's SIAM roadmap are still in development and not yet available, indicating that its capabilities are not fully mature to meet industry best practices and may not satisfy buyers seeking comprehensive, mature and forward-looking SIAM solutions.
- **Reliance on traditional and limited pricing models:** Tech Mahindra mainly relies on conventional fixed-price and T&M models, which may be less appealing to organizations seeking flexible or outcome-based commercial arrangements that directly correlate costs with measurable business results. This could limit opportunities for enhanced cost-efficiency and value realization linked to achieving specific business objectives.
- **Comparatively lower CMDB accuracy:** Tech Mahindra reported an average percentage accuracy of the CMDB CIs under its management as 85%, which rises to over 90% in mature environments. This figure is lower compared to many other evaluated vendors — they reported CMDB accuracy ranging from 94% to 98% — suggesting a potential area for improvement in Tech Mahindra's configuration management precision relative to industry peers.

## Wipro

Wipro is a Leader in this Magic Quadrant. It has provided SIAM offerings for 16 years. Its top three SIAM service verticals are financial services, healthcare and life sciences, and manufacturing. Wipro differentiates itself by extending its SIAM capabilities beyond traditional IT-centric services to integrate functions like HR and finance, allowing it to handle complex integration.

## Strengths

- **Strong adoption of XLAs and experience management offices:** Wipro offers clients improved service quality and user satisfaction as it prioritizes experience-centric outcomes and uses XLA frameworks to analyze and enhance services. This focus on experience management means services are designed and delivered with the end-user's perception and needs in mind.

- **Strategic expansion of SIAM capabilities into non-IT domains:** Clients stand to gain from holistic enterprise-wide service management, extending beyond traditional IT into operational technology and broader business processes. The integration of AI, GenAI and agentic AI services suggests innovative and efficient solutions for complex, cross-functional service challenges. Wipro's SIAM capabilities encompass functions like HR and finance, enabling the integration of a wide range of capabilities beyond traditional IT.
- **Modular approach to SIAM:** Wipro has developed a modular approach to SIAM, with specific SIAM processes and frameworks tailored for requirements such as digital business, platform-centric, cloud and operational technology. This approach allows customizable choices to meet specific customer needs, which may appeal to clients seeking flexible and futuristic approaches to SIAM.

## Cautions

- **Unclear differentiation between enterprise service management (ESM) and SIAM:** Potential clients might face ambiguity in understanding Wipro's specific SIAM focus, potentially leading to solutions that lean more toward general ESM principles rather than dedicated SIAM needs. As ESM focuses on managing services across the enterprise business functions, while SIAM specializes in integrating and coordinating multiple service providers for seamless delivery. This lack of clarity could complicate service agreement definitions and the actual scope of integration management provided.
- **Higher global staff attrition percentage:** Wipro's reported global attrition percentage for its staff dedicated to SIAM services is 10%. Although staff attrition is an industrywide challenge, this figure is higher than the average of 8% among the other service providers in this Magic Quadrant. A higher attrition rate could potentially lead to challenges in maintaining consistent knowledge, experience and team continuity within long-term SIAM engagements.
- **Prevalence of traditional pricing models:** Only about 5% of Wipro's deals include incentives or penalties for end-to-end outcomes. Potential clients may experience less flexibility in pricing structures and a reduced shared risk-reward model. This could limit direct financial incentives for Wipro to achieve specific client outcomes or take on significant risk ownership, which could result in a more transactional relationship than a true partnership focused on shared success and end-to-end outcomes.

# Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

## Added

- CGI
- DXC Technology
- Microland

## Dropped

- Unisys is an IT services and consulting company headquartered in the U.S. It has provided SIAM offerings for more than 10 years and offers services in almost all industry verticals, including retail, healthcare and life sciences. Unisys was dropped from this Magic Quadrant because it did not meet the inclusion criteria, requiring SIAM services, management and consulting to at least 10 clients.
- Stefanini is a global tech company headquartered in Brazil. It has been providing SIAM offerings for 11 years. Stefanini provides services in almost all industry verticals, including manufacturing, retail and healthcare. Stefanini was dropped from this Magic Quadrant because it did not meet the inclusion criteria, which requires providing BOT SIAM services as part of the company's offering.

# Inclusion and Exclusion Criteria

To qualify for inclusion in this Magic Quadrant, service providers need to fulfill all of the following requirements:

- Provide and deliver SIAM services for five years or more. To qualify, SIAM services must encompass the following core services and operating models:

- SIAM consulting services, including advisory, BOT, design and development, organizational change management, etc.
- SIAM mixed managed services, including SIAM governance and management of all other service providers (internal and external), while also having a separate contract responsibility to manage one or more service towers.
- Provide operational SIAM services (both consulting and managed) with a presence in at least two of the following regions:
  - The Americas
  - EMEA
  - Asia/Pacific

To avoid doubt, we do not consider the presence of a legal entity or sales office alone as fulfillment of this criterion.

- Provide SIAM services and management, and consulting services, to at least 10 clients. To avoid doubt, a client must have either offices with staffing or technology for services (e.g., data centers, network, etc.) where SIAM services are performed.
- Provide SIAM services performed by the providers' own FTE staffing resources at a minimum ratio of 80% FTE to 20% third party or subcontracting. To avoid doubt, an internal FTE must be a badged, full-time employee on the provider's payroll. Any temporary employees, contingent employees, contracted workers, or other third-party firms and partners delivering any aspects of SIAM services would not be considered as FTE staffing resources.
- Have a centralized platform for integration across all providers managed for all processes, reporting, dashboards, etc.

## Evaluation Criteria

### **Ability to Execute**

**Product or Service:** This refers to the core goods and services offered by the vendor that compete in/serve the defined market. It includes current product/service capabilities,

quality, feature sets, skills, etc., whether offered natively or through OEM agreements/partnerships as defined in the Market Definition and the subcriteria.

**Overall Viability:** Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood of the individual business unit to continue to invest in the product, continue offering the product and advancing the state of the art within the organization's portfolio of products.

**Sales Execution/Pricing:** This refers to the vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

**Market Responsiveness/Record:** This criterion assesses the ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. We also consider the vendor's history of responsiveness.

**Marketing Execution:** This refers to the clarity, quality, creativity and efficacy of programs designed to deliver the organization's message in order to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This mind share can be driven by a combination of publicity, promotional, thought leadership, word-of-mouth and sales activities.

**Customer Experience:** This criterion assesses the products and services and/or programs that enable customers to achieve anticipated results with the products evaluated. Specifically, this includes quality supplier/buyer interactions, technical support or account support. This may also include ancillary tools, customer support programs, availability of user groups, service-level agreements, etc.

**Operations:** This refers to the ability of the organization to meet goals and commitments. Factors include quality of the organizational structure, skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently.

**Table 1: Ability to Execute Evaluation Criteria**

<i>Evaluation Criteria</i>	<i>Weighting</i>
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	Medium
Marketing Execution	Low
Customer Experience	High
Operations	Medium

Source: Gartner (October 2025)

## Completeness of Vision

**Market Understanding:** This refers to the ability to understand customer needs and translate them into products and services. Vendors that show a clear vision of their market listen, understand customer demands, and can shape or enhance market changes with their added vision.

**Marketing Strategy:** This refers to clear, differentiated messaging consistently communicated internally, and externalized through social media, advertising, customer programs and positioning statements.

**Sales Strategy:** This refers to a sound strategy for selling that uses the appropriate networks, including direct and indirect sales, marketing, service, and communication. It includes having partners that extend the scope and depth of market reach, expertise, technologies, services and the vendors' customer base.

**Offering (Product) Strategy:** This refers to an approach to product development and delivery that emphasizes market differentiation, functionality, methodology and features as they map to current and future requirements.

**Business Model:** This criterion assesses the design, logic and execution of the organization's business proposition to achieve continued success.

**Vertical/Industry Strategy:** This criterion assesses the strategy to direct resources (sales, product, development), skills and products to meet the specific needs of individual market segments, including verticals.

**Innovation:** This refers to the direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or preemptive purposes.

**Geographic Strategy:** This criterion assesses the provider's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries, as appropriate for that geography and market.

**Table 2: Completeness of Vision Evaluation Criteria**

<i>Evaluation Criteria</i>	<i>Weighting</i>
Market Understanding	High
Marketing Strategy	Low
Sales Strategy	Low
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	High

<i>Evaluation Criteria</i>	<i>Weighting</i>
Innovation	Medium

Source: Gartner (October 2025)

## Quadrant Descriptions

### Leaders

Leaders perform skillfully. They have a clear vision of the market's direction (i.e., digital transformation, cloud-first, intelligent automation, agile operations and their own ecosystem) and develop competencies to maintain their leadership. They shape the market rather than follow it.

### Challengers

Challengers execute well today but have a less well-defined view of the market's direction. They need to be more aggressive in outlining and communicating their strategy for the future.

### Visionaries

Visionaries have a clear vision of the market's direction and focus on providing services to meet future market needs. They need to improve their ability to deliver and penetrate the global market.

### Niche Players

Niche Players successfully focus on a particular service, a limited number of geographical markets or both. This narrow focus may affect their ability to outperform or innovate.

## Context

When examining the individual revenue generated by the service providers in this Magic Quadrant, the contribution of SIAM-related services ranged from 1% to 15% of total revenue

for most of them. This illustrates the varying levels of dependence on this segment across the industry.

In terms of client focus, the primary target for most providers continues to be large enterprise clients. On average, each vendor manages approximately 11 different providers under the SIAM model. While fixed-price and T&M contracts remain the preferred commercial models, some providers have started incorporating outcome-based and other innovative pricing structures, such as XLA-based, to better align with client expectations and performance metrics.

From an industry perspective, sectors such as manufacturing, retail, banking and financial services, and energy and utilities emerge as the most prominent consumers of SIAM services, reflecting their strong demand for scalable and efficient solutions. It is important to point out that only a limited number of providers reported offering stand-alone SIAM services, indicating a relatively lower market maturity for completely independent delivery models within this space. This also indicates that SIAM service providers tend to prioritize clients that require direct contractual relationships across a broader range of services, as this approach facilitates operational efficiency and enhanced oversight of delivered activities.

## Market Overview

The landscape of SIAM service offerings is changing quickly, with big differences between providers and regions, showing that the market is still developing. While a comprehensive, independent assessment of the total addressable market size for SIAM solutions has not been conducted by Gartner, preliminary projections suggest that the market could potentially increase revenue by 20% by the end of 2026. Despite the variability in maturity and adoption, SIAM solutions remain a critical component within the broader service portfolios of providers.

The ever-increasing interest from enterprise end users indicates recognition of the value that SIAM service capabilities deliver in enhancing operational efficiency.

In the last year, the SIAM market has seen an increased focus on technological advancements and the rise in AI/ML integration into SIAM solutions to achieve outcomes such as task automation, improved performance and enhanced service delivery. The adoption of automation tools within SIAM frameworks has become increasingly prevalent.

The increase in managed service demand is driving the need for structured service governance and coordinated service management through SIAM. End users struggling with growing regulatory requirements are using SIAM to ensure compliance with relevant industry regulations across different service providers and to address the increasing cybersecurity threats faced by the organizations.

As the demand for SIAM continues to rise significantly, the emphasis has shifted toward monitoring and understanding the growing number of clients actively expressing interest in either SIAM-only and SIAM services.

In summary, in the past few years, the SIAM market has centered around technological advancements for business value alignment and outcome realization.

In line with the accelerating pace of change in client expectations and the increasing complexity of customer engagement requirements, service providers have proactively engineered and operationalized technological capabilities designed to address the multifaceted demands associated with SIAM services.

As of 2025, the key aspects of SIAM include:

- **Strategic vertical integration of SIAM service offerings:** Client organizations increasingly prioritize SIAM providers that possess deep domain expertise and demonstrate understanding of their specific industry requirements. The service providers evaluated in this Magic Quadrant deliver technology platforms and specialized tools purpose-built to address the distinct operational and strategic needs of specific industries. Clients seek comprehensive, end-to-end SIAM solutions that deliver value according to their unique business objectives to ensure both operational efficiency and cost-effectiveness.
- **Dashboards and tools:** Providers reported the availability of purpose-built toolkits designed to streamline and standardize a variety of critical operational processes. These toolkits are typically developed using established best practices and industry benchmarks to ensure consistency, accuracy and scalability across engagements. Most providers have deployed dashboard interfaces integrated into their broader service delivery frameworks that offer real-time visibility into their suite of SIAM offerings.
- **AI/GenAI/agentic AI integration:** A majority of suppliers have made significant investments in automation technologies to enhance operational efficiency, deliver service consistency, and improve cost competitiveness, which are key considerations in SIAM supplier selection and ongoing vendor performance management.

- **Limited offering of stand-alone SIAM services:** The constrained availability of stand-alone SIAM service offerings within the supplier landscape, including those undergoing digital transformation, can be attributed to prevailing market dynamics, wherein demand for isolated SIAM services is relatively infrequent. Instead, the majority of clients exhibit a pronounced preference for procuring SIAM capabilities as an integrated component within a comprehensive suite of end-to-end IT service management frameworks, influencing providers to align their service portfolios accordingly.
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## ⊕ Evidence

## ⊕ Evaluation Criteria Definitions

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