

Multisourcing Service Integration 2025 RadarView™

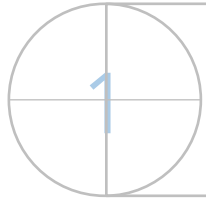
Improving business outcomes with
Gen AI-driven, experience-focused
service integration

July 2025

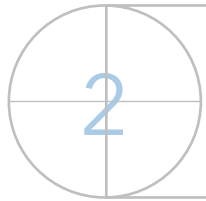
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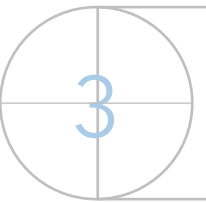
About the Multisourcing Service Integration 2025 RadarView



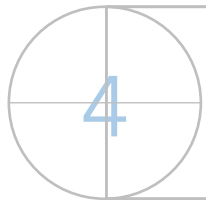
The Multisourcing Service Integration (MSI) 2025 RadarView is a companion report to the Multisourcing Service Integration 2025 Market Insights. While the Market Insights takes a broader perspective, offering a comprehensive overview of the current state of the MSI market, this report concentrates on evaluating service providers.



Avasant used a rigorous methodology to evaluate 32 providers across the key dimensions of practice maturity, partner ecosystem, and investments and innovation. Through our analysis, we recognized 21 providers that brought the most value to the market over the past 12 months.



The *Multisourcing Service Integration 2025 RadarView* aims to offer insights into the leading service providers for MSI services. Based on our methodology, these service providers are categorized into four broad segments: leaders, innovators, disruptors, and challengers.



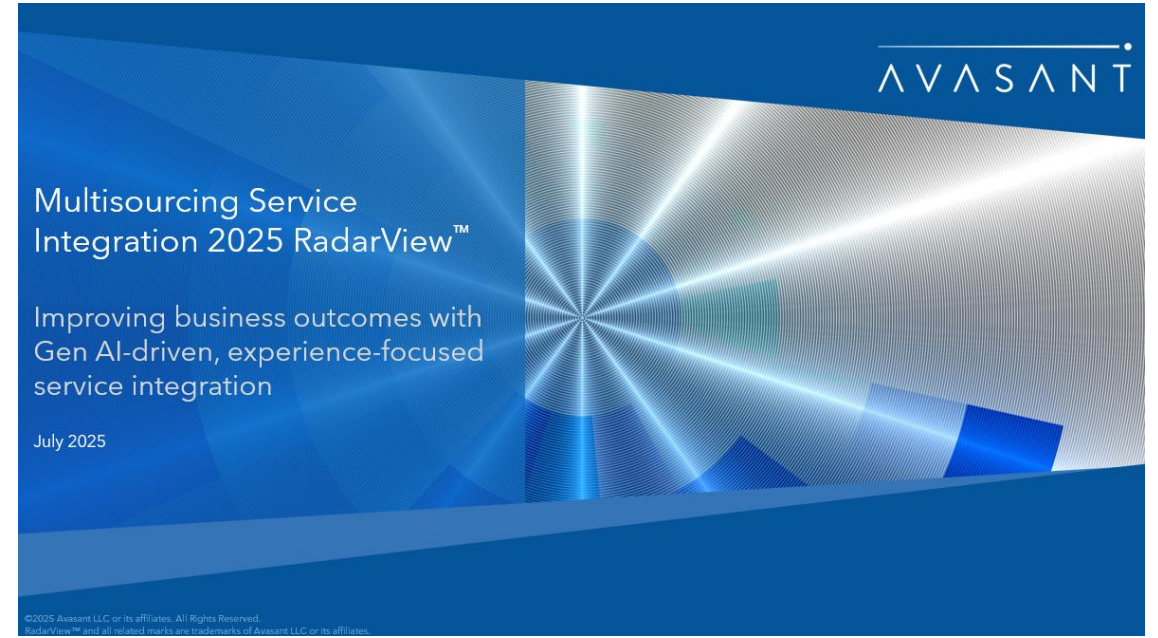
To enable decision-making for enterprises, Avasant has provided an overview of the major service providers in the MSI domain. This includes a list of their top enterprise clients, customer success stories, key IP assets/solutions and partnerships, and major industry verticals they serve. This is supported by an analyst's perspective on the provider across the key dimensions defined in the second point above.

Key reports of Avasant's Multisourcing Service Integration Research



Market Insights™ 2025

This report provides a comprehensive overview of the multisourcing service integration (MSI) landscape. It delves into the current state of the market and analyzes recent trends shaping the multisourcing service integration industry.



RadarView™ 2025

This report examines how leading service providers are delivering MSI services. It covers key supply-side trends and features a deep-dive analysis of providers that Avasant has recognized for their excellence and innovation in the space.

Defining multisourcing service integration

Multisourcing service integration (MSI)

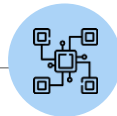
MSI encompasses end-to-end integration, management, and governance of all services provided by multiple vendors to improve visibility and accountability and realize the full value of outsourced services. These services include cloud, security, network, end-user computing, application development, support and maintenance, and other managed services vital for companies to achieve their business outcomes and strategic objectives. Service integration and management (SIAM) serves the same purpose as MSI by enabling organizations to create a unified view through the integration and management of multiple suppliers.

Key dimensions of MSI services



Strategy and consulting

Understanding the business requirements and associated risks, undertaking assessments, and creating an achievable MSI road map



Integration

Facilitating integration among organizations and people, value streams and processes, technology, tools and data, and service providers



Implementation and managed services

Designing prototypes, deployment, training, testing, and rollout, and supporting incident management and monitoring for performance and continuous improvement



Operations agreements

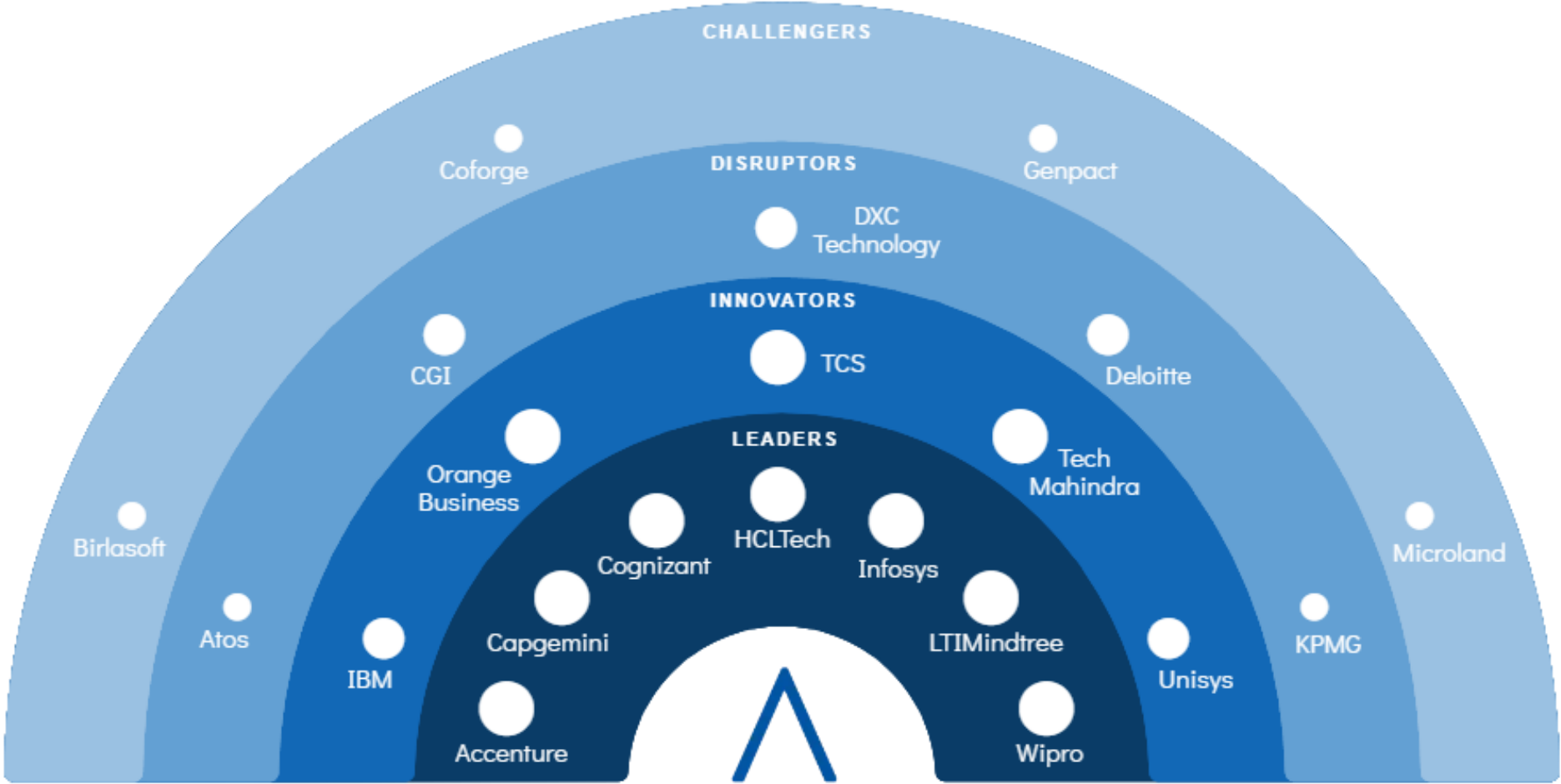
Determining business outcomes and experiences that will drive the establishment of appropriate SLAs, KPIs, XLAs, and OLAs



Executive summary

Avasant's Multisourcing Service Integration 2025 RadarView recognizes 21 top-tier providers supporting the enterprise adoption

Practice maturity 

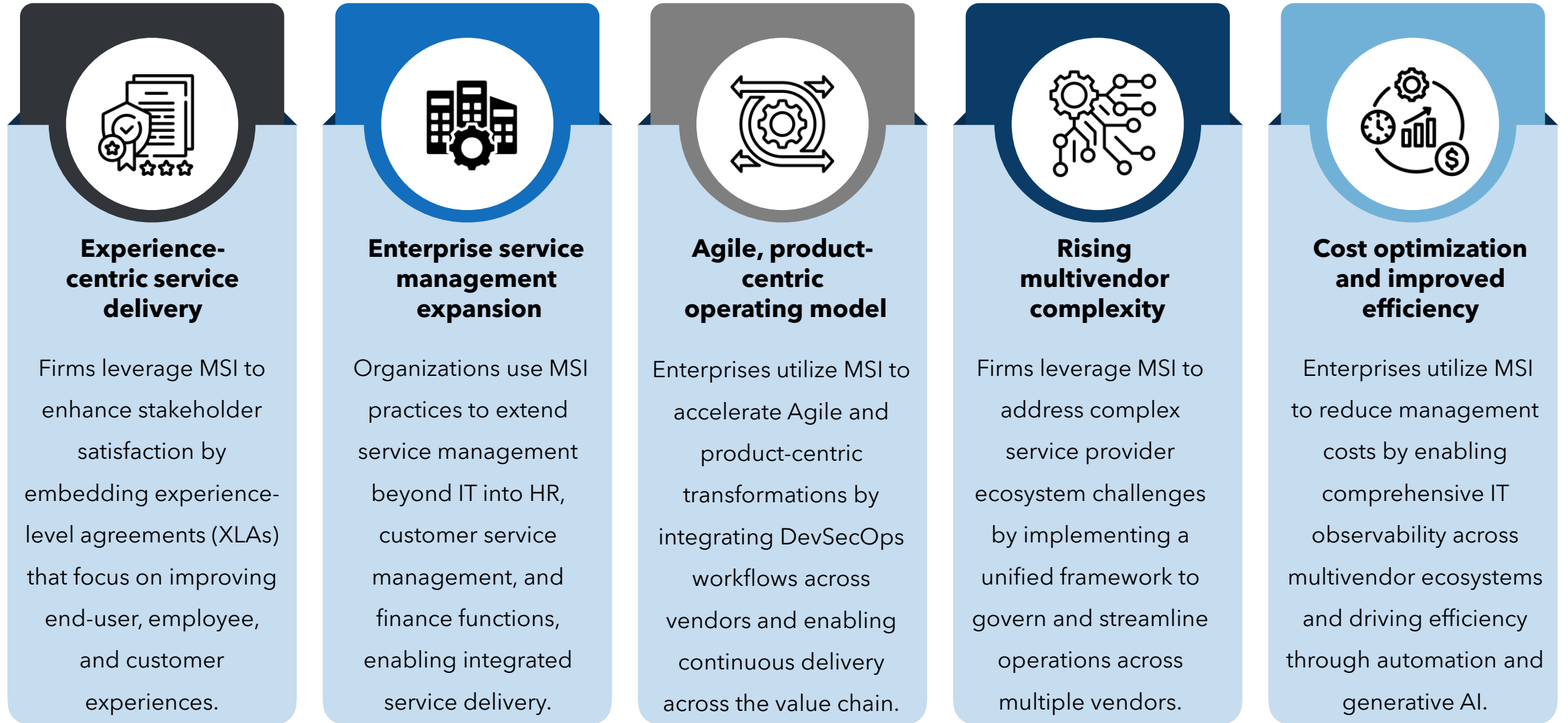


Note: Please refer to Avasant's [Multisourcing Service Integration 2025 Market Insights™](#) for demand-side trends.

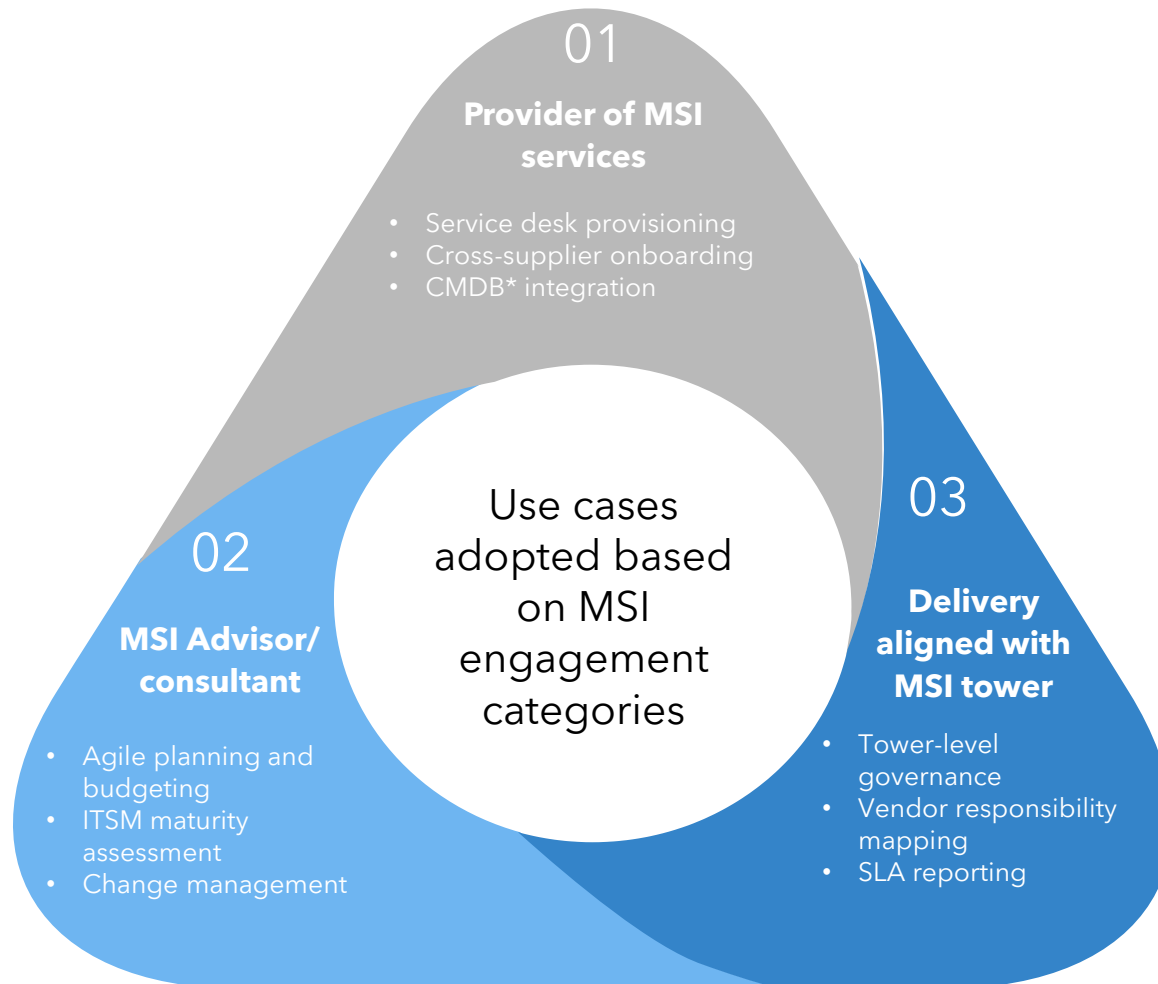


State of the market

Experience-centric service delivery and service management expansion into non-IT functions are the critical drivers that are accelerating MSI adoption



Use cases such as CMDB integration, change management advisory, and tower-level governance are strategic enablers across various MSI engagement types



A global manufacturing company

1

The company implemented an SIAM framework integrated with a digital command center, CMDB, and omnichannel service catalog. This enabled centralized service visibility, improved configuration tracking, and more consistent service delivery across business units.

A European public sector agency

2

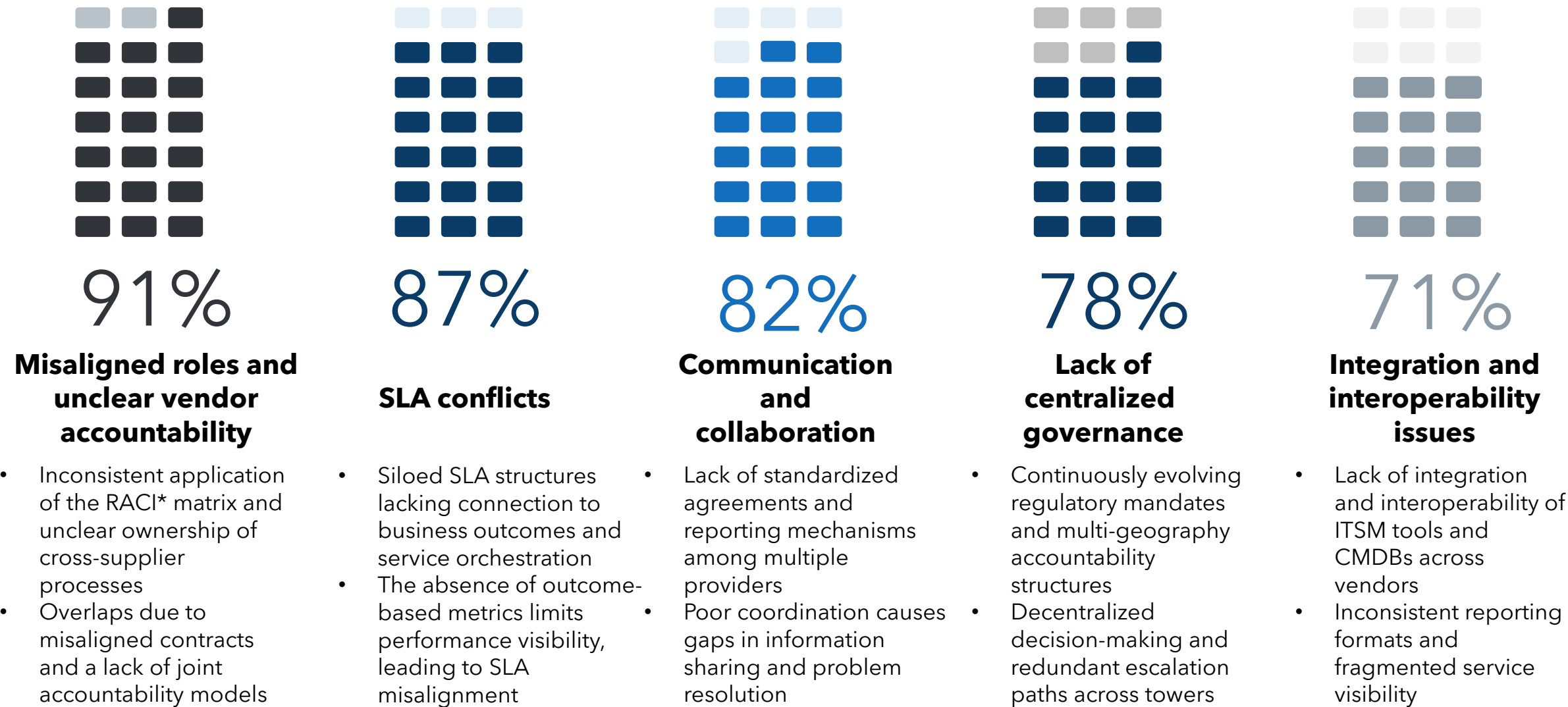
The agency engaged a provider to deliver MSI advisory support focused on redesigning the IT operating model. The initiative improved change management, streamlined service governance, and optimized multisupplier service delivery outcomes.

A UK-based construction firm

3

The firm adopted a structured SIAM model to enable tower-level visibility and governance. The engagement included standardized OLAs, risk management forums, and vendor accountability frameworks that helped reduce incidents and improve service performance.

Vendor accountability, SLA conflicts, and collaboration are the top challenges enterprises face while implementing MSI services



*RACI: Responsible, Accountable, Consulted, and Informed
Source: Avasant MSI Services RadarView Survey, April-June 2025

Enterprises are integrating Gen AI and agentic AI into MSI services for governance, incident resolution, service desks, and knowledge management

In 2025, enterprises are increasingly adopting generative AI and agentic AI across core MSI activities to accelerate decision-making, automate incident resolution, and improve user experience.



Gen AI use cases mapped across key dimensions of MSI service delivery

Service orchestration and governance	Incident resolution	AI service desk and virtual agents	Knowledge and experience management
Orchestrate change, incident, and SLA workflows across providers using multi-agent Gen AI platforms	Auto-triage tickets and recommend resolution steps using LLMs trained on historical incidents	Use multilingual Gen AI agents to deliver 24/7 user support	Summarize and translate knowledge base articles, solution repositories, and best practices across service towers
Generate proactive risk assessment briefs and service performance summaries for leadership	Generate RCA* summaries through postmortem bots and reduce recurrence of issues	Deploy AI assistants that provide real-time recommendations during ticket handling	Enable personalized agentic AI-based search by integrating enterprise knowledge with user context
Produce policy compliance checklists aligned with evolving regulatory standards	Prioritize incidents based on impact and urgency using AI models to reduce alert fatigue	Enable agentic workflows to streamline provisioning, access requests, and vulnerability communication	Create tailored learning paths for support staff based on interaction history and resolution gaps

*RCA: Root cause analysis
Source: Avasant MSI Services RadarView Survey, April-June 2025



Future outlook

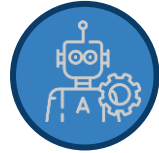
MSI is evolving into a strategic orchestration layer that drives business value, agility, and innovation across multivendor environments



MSI will pivot into experience-centric value delivery. Enterprises will expect providers to move beyond SLA-based governance to focus on XLAs, enabling outcome-driven delivery that enhances employee, customer, and end-user experiences across the digital ecosystem.



MSI pricing models will adapt to rising cost and profitability pressures. As enterprises push for efficiency, MSI contracts will shift toward outcome-based pricing, with increased focus on automation, lean operations, and shared accountability for financial outcomes.



The integration of Gen AI and agentic AI into MSI processes is expected to further accelerate. Companies will continue to leverage Gen AI and agentic AI to automate coordination tasks, predict service disruptions, and provide real-time decision support, making service integration faster and more autonomous.



MSI will expand beyond IT into business and operational functions. Organizations will extend MSI capabilities into finance, HR, procurement, and sales to unify governance, manage complexity, and optimize service delivery across business functions.



Product-centric operating models will redefine MSI delivery. Enterprises adopting agile, product-aligned structures will require MSI providers to integrate with cross-functional teams, support faster release cycles, and align service management with product outcomes.



Regulatory compliance and data sovereignty will reshape MSI governance. MSI will expand its scope to address evolving global and industry-specific regulatory requirements, with integrated risk and compliance frameworks embedded across vendor ecosystems.

AVASANT

Cognizant profile

Cognizant: RadarView profile



- Practice maturity ★★★★★
- Partner ecosystem ★★★★★
- Investments & innovation ★★★★★

Has built the SIAMNXT platform using Neuro® AI and CFS.AI for autonomous SIAM and ITSM. Integrates AI, cloud, and FinOps to drive hyperautomation across complex IT environments.

Practice overview		Client case studies		
<ul style="list-style-type: none">Practice size: 3,300+Active clients: 140+Certified/trained resources: 19,500+Delivery highlights: 90+ delivery centers worldwide		<ul style="list-style-type: none">Established an SIAM office for a global Fortune 100 retail company and automated risk management using the SIAMNXT framework and ServiceNow Gen AI. This reduced major incidents by over 21% and improved operational efficiency by 40% and change success rates by 30%.Implemented SIAM transformation for a life sciences firm to streamline multivendor operations using hybrid processes and generative AI (Gen AI). This helped the client achieve 99% SLA adherence, 50% faster cell therapy turnaround, and over 90% forecasting accuracy.Unified fragmented IT processes and vendor tools for a central bank in the Nordics by using SIAMNXT and ServiceNow ITSM integration. It achieved zero P1 incidents, ensured high availability of critical applications, and improved customer satisfaction.Transformed adverse event case processing for an American biopharmaceutical company. It automated intake workflows and streamlined operations. This led to \$1.1M in annual cost savings, 45% faster processing, 64% reduction in manual intervention, and 20% fewer IT SLA breaches.		
\$250M-\$500M	20%-30% YOY			
Practice revenue, FY 2024	Revenue growth, FY 2024			
Key IP and assets		Partnerships/alliances	Sample clients	Industry coverage
<ul style="list-style-type: none">Cognizant Process Space: A centralized repository of SIAM and ITIL-aligned processesProblem management life cycle tool: A tool that enables vendor-related problem tracking and root cause analysis reportingSIAMNXT Framework: A framework that supports service integration using Gen AICognizant Neuro® IT: An AI-powered observability tool		<p>Cloud platform providers</p> <p>aws Google Cloud Microsoft</p> <p>Solution providers</p> <p>servicenow vmware bmc</p> <p>DELL Technologies dynatrace flexera</p> <p>MuleSoft Grafana Power BI</p>	<ul style="list-style-type: none">A global Fortune 100 retail companyA life sciences firmA central bank in the NordicsAn American biopharmaceutical companyAn APAC-based retail organizationA postal services firm in EuropeA North America-based steel manufacturer	<p>Aerospace & defense</p> <p>Banking</p> <p>Financial services</p> <p>Government</p> <p>Healthcare & life sciences</p> <p>High-tech</p> <p>Insurance</p> <p>Manufacturing</p> <p>Nonprofits</p> <p>Retail & CPG</p> <p>Telecom, media & entertainment</p> <p>Travel & transportation</p> <p>Utilities & resources</p>

Darkener color indicates higher industry coverage through digital services

Cognizant: RadarView profile

Analyst insights

Practice maturity



- Cognizant provides a SIAM Readiness and Maturity Assessment framework to define tailored strategies, business cases, road maps, and change models across IT, HR, finance and accounting, and supply chain functions. It includes operating model design with clear role separation among retained teams, integrators, and providers, along with contracting guidance on SLAs, metrics, and governance alignment.
- Cognizant's SIAMNXT framework simplifies platform integration with standardized blueprints, enabling plug-and-play connectivity across ITSM, operations, observability, APIOps, orchestration, and dashboards. It supports workflow automation, SLA/OLA alignment, governance, and engagement across DevOps, hybrid cloud, continuous integration and continuous delivery (CI/CD), FinOps, and business processes.
- Cognizant's Service Maturity Framework enables enterprises to assess SLAs and service performance across technical, process, and people layers. It enables continual improvement through automation, problem management, and corrective actions. It offers basic and predictive monitoring capabilities with corrective and preventive action integration.

Partner Ecosystem



- Cognizant has developed the Neuro® IT Operations platform, a cloud-native platform, in collaboration with ServiceNow, Dynatrace, Zenoss, and Vault. This platform integrates automation, observability, and AI-led incident management. It delivers automated triaging and remediation capabilities by leveraging ServiceNow to support ITSM workflows, Dynatrace and Zenoss for telemetry and correlation, and Vault to manage credentials.
- Cognizant has launched a dedicated ServiceNow Experience Center in Bengaluru to showcase its joint capabilities and solutions. As a strategic partner, Cognizant has developed joint go-to-market offerings and ITSM solutions with ServiceNow.
- It collaborates with Datadog to monitor application performance and observability across industries in North America, Continental Europe, the UK, and Ireland.

Investments and Innovation



- Cognizant has launched Neuro IT Operations, an AIOps-enabled platform that tracks and optimizes the financial performance of multivendor IT services. The platform ensures cost transparency, budgeting, and chargeback alignment and collaborates with suppliers to validate consumption-based pricing and cost controls while ensuring financial governance, cost optimization, and transparency.
- Cognizant is developing CFS.AI, a generative AI-powered solution that automates ITSM-specific tasks by allowing systems to autonomously make decisions and take actions. Through this solution, it intends to streamline operations, improve accuracy to up to 50%, and enhance compliance, standardization, and delivery quality. CFS.AI is being piloted with large customers.



Appendix: About RadarView

The Multisourcing Service Integration 2025 RadarView assesses service providers across three critical dimensions

Practice maturity

- This dimension considers the current state of a provider's multisourcing service integration practice in terms of its strategic importance for the provider, the maturity of its offerings and capabilities, and client engagement.
- The crucial aspects in this dimension are the width and depth of the client base, usage of proprietary/outsourced tools and platforms, and quality of talent and execution capabilities.

Partner ecosystem

- This dimension assesses the nature of the provider's partnerships, their objectives (codevelopment and co-innovation), and engagement with solutions providers, startup communities, and industry associations.
- Vital aspects in this dimension are joint development programs around offerings, go-to-market approaches, and the overall depth of partnerships.

Investments and innovation

- This dimension measures the strategic direction of the provider's investments and resultant innovations in the offerings and commercial model and how it aligns with the future direction of the industry.
- The critical aspects of this dimension include both organic and inorganic investments toward capability and offering growth, technology development, and human capital development, along with innovative solutions developed with strategic partners.

Research methodology and coverage

Avasant based its analysis on several sources:

Public disclosures	Publicly available information such as Securities and Exchange Commission filings, annual reports, quarterly earnings calls, and executive interviews and statements
Market interactions	Discussions with enterprise executives leading outsourcing initiatives and influencing service provider selection and engagement
Provider inputs	Inputs collected in May 2025 through an online questionnaire and structured briefings in May-June 2025

Of the 32 service providers assessed, the final 21 featured in the Multisourcing Service Integration 2025 RadarView are:



Reading the RadarView

Avasant has recognized service providers in four classifications:



Leaders show consistent excellence across all key dimensions of the RadarView assessment (practice maturity, partner ecosystem, and investments and innovation) and have had a superior impact on the marketplace. These providers have shown true creativity and innovation and have established trends and best practices for the industry. They have proven their commitment to the industry and are recognized as thought leaders in their space, setting the standard for the rest of the industry to follow. Leaders display a superior quality of execution and a reliable depth and breadth across verticals.



Innovators show a penchant for reinventing concepts and avenues, changing the very nature of how things are done from the ground up. Unlike leaders, innovators have chosen to dominate a few select areas or industries and distinguish themselves through superior innovation. These radicals are always hungry to create pioneering advancements in the industry and are actively sought after as trailblazers, redefining the rules of the game.



Disruptors enjoy inverting established norms and developing novel approaches that invigorate the industry. These providers choose to have a razor-sharp focus on a few specific areas and address those at a high level of granularity and commitment, which results in tectonic shifts. While disruptors might not have the consistent depth and breadth across many verticals like leaders or the innovation capabilities of innovators, they exhibit superior capabilities in their areas of focus.



Challengers strive to break the mold and develop groundbreaking techniques, technologies, and methodologies on their way to establishing a unique position. While they may not have the scale of the providers in other categories, challengers are eager and nimble and use their high speed of execution to great effect as they scale heights in the industry. Challengers have a track record of delivering quality projects for their most demanding Global 2000 clients. In select areas and industries, challengers might have capabilities that match or exceed those of the providers in other categories.

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Note: We would also like to acknowledge the contribution of Asmita Gaur, who interned with us from April to July 2025, to this RadarView.

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