IDC MarketScape

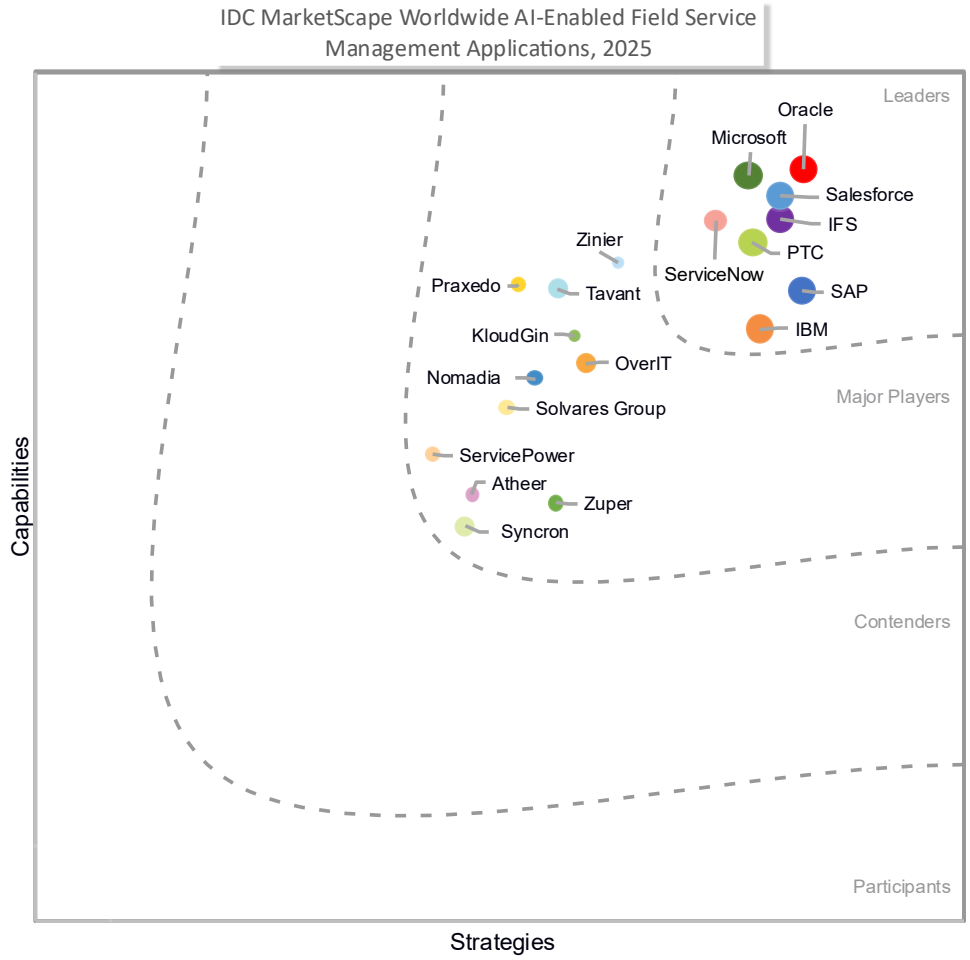
IDC MarketScape: Worldwide AI-Enabled Field Service Management Applications 2025 Vendor Assessment

Aly Pinder

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide AI-Enabled Field Service Management Applications Vendor Assessment



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

IDC OPINION

Excellence in field service management (FSM) has progressed in recent years. Just a few years back, the field service technician was responsible for showing up with actual resolution a by-product of luck in many instances. The field team rarely knew what service part would be needed because they didn't actually know the reason an asset or a piece of equipment wasn't working at the time they were scheduled or dispatched. In IDC's recent *Product Innovation and Aftermarket Services Survey,* the top driver for organization's service efforts is to improve key customer metrics like customer effort, customer retention, and customer satisfaction score (CSAT) (59.1%, n = 447). Arriving within an SLA was good enough, but as the consumer world has informed the business world the expectation for exceptional service outcomes delivered at each interaction point is now the North Star.

Technology advancements and automation tools have accelerated this shift, enabling service teams to cull through volumes of data to find the right insights to make more timely decisions. This is becoming ever more important as field service technicians and the back-office teams that support them are the face of the brand with the customer. However, the race to excel is becoming cluttered with failed experiments and pilots for many field service organizations. The ability to move at the pace of customer expectations has proved to be difficult as field service organizations are fearful of making the wrong bets. This is where IDC believes artificial intelligence (AI) and AI-enabled tools can help organizations move faster and find the right solutions to dynamic pressing challenges. AI should augment these teams and enable them to work more effectively, efficiently, and with the purpose of delivering enhanced experiences to customers.

Key findings include the following:

- Data and intelligence are vastly different aspects of the field service organization. In the advent of the Internet of Things (IoT) and connected products, assets, and equipment, the expectation has long been that field service teams will have the ability to finally shift away from reactive service to more predictive resolution. Unfortunately, data silos, fragmented technology stacks, and misaligned KPI thwart organization's abilities to solve customer issues prior to a failure.
- AI-enabled applications are driving significant advancements in field service management, including scheduling optimization, route planning, and technician support, enabling faster issue resolution and improved customer outcomes. The

vast amount of data, which needs to be analyzed from a variety of applications, demands field service organizations leverage more robust tools that can deliver insights quickly and accurately.

- Challenges across the market include overcoming legacy systems, addressing industry-specific requirements, and navigating fragmented technology landscapes. Organizations must balance scalability, configurability, and integration capabilities to meet diverse service models and needs. In addition, market inertia and risk aversion to AI adoption remain barriers, particularly in industries with slower digital transformation rates.

This "short list" as provided by this IDC MarketScape highlights the variety of future strategies and current capabilities prioritized by technology vendors as these companies enable digital transformation, AI enablement, business model modernization, and customer excellence.

For this IDC MarketScape, all 19 vendors support the end-to-end field service operations and its varied set of processes. This IDC MarketScape explores the evolving needs of the field service market in this current era of AI enablement. The technology vendors in this study have, to varying degrees, invested in and deployed AI functionality in support field service organizations. The market is moving fast and AI-enabled applications will provide the catalyst for a major shift in the field service market.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This IDC study assesses the capabilities and business strategies of technology vendors in the field service management market. For the purpose of this study, we have focused on those vendors that we deem to be notable because of the following characteristics:

- Vendors must have a field service management platform that is currently commercially available.
- Vendors must have demonstrated investments or have already deployed AI-enabled capabilities and functionality in generally available products to support the field service operations.
- Vendors must have customers in at least two industry segments and two geographic regions.
- Vendors must have served the field service management market for at least five years.
- Vendors have referenceable clients using a broad set of field service management functionality as defined.
- Vendors must have capabilities to support a broad range of field service management activities and processes.

ADVICE FOR TECHNOLOGY BUYERS

Digital transformation remains a key initiative for the field service organization. Across a variety of industries, paper-based and manual processes persist slowing innovation, customer excellence, and field service productivity. Service leaders have the opportunity to embrace technology to ensure disruption and change are catalysts for improvement as opposed to a force leading to failure. For aftermarket service and field service organizations intending to automate and improve their field service operations and aftermarket processes, IDC offers the following recommendations:

- **Work with technology vendors that have a clear strategy and vision for the future.** Technology vendors are beginning to establish communities to engage in best practice sharing, new innovation ideation, formalization of standards, and feedback discussions. Field service leaders need to recognize that they can play a role in their own digital transformation journey while leveraging the breadth of a technology vendor's resources and scale. But field service organizations must remain vigilant that their technology partners provide business value–focused innovations and not shiny new objects alone.
- **Human in and on the loop but also get comfortable with trusting AI and automation.** AI and agentic AI are reframing what is possible with regard to customer engagement, issue resolution, and service planning. AI tools should augment field teams and enable them to work more effectively, efficiently, and with the purpose of delivering enhanced experiences to customers. But for this evolution to be lasting, service teams must embrace the technology as an enabler to help focus their efforts on delivering value as opposed to being something to be feared.
- **Assess maturity and determine risk aversion to digital transformation.** Taking stock is crucial to sustained success and positive investments in technology. Service organizations need to be honest with themselves and recognize that it is actually prudent to move at the pace that the business can adjust to. Too much change too fast can set an organization back not only falling behind the competition but also losing the trust of the end customer and the service team.
- **Client centricity, not one size fits all.** Most field service organizations believe themselves to be unique. This isn't necessarily the case, but technology vendors should be flexible and customer obsessed enough to enable industry templates, which can be configured to need. Rigidity in technology initiatives is a recipe for poor adoption and wasted resources and effort.
- **Technology initiatives success requires orchestration.** Decision-makers should consider vendors with robust integration capabilities, such as open APIs

and prebuilt connectors, to ensure seamless interoperability with existing enterprise systems like ERP, CRM, and IoT platforms. This approach minimizes disruption and accelerates time to value during digital transformation initiatives.

VENDOR SUMMARY PROFILES

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

Atheer

Atheer is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide AI-enabled field service management applications.

Atheer is a global technology vendor headquartered in Santa Clara, California, providing support for the aftermarket and field service management markets. Atheer has an end-to-end field service management application that connects original equipment manufacturers' (OEMs') expertise with field technicians through augmented reality (AR)-enabled remote assistance, digital workflows, and real-time collaboration. Atheer has supported the aftermarket for nine years. The company primarily supports FSM clients in North America, Europe, and Asia/Pacific, but it can deliver support globally. Atheer has strategic partnerships with Amazon Web Services (AWS), Autotech Group, British Telecom, CB Technologies Inc., CTC TECHNOLOGY Corp., Google Cloud, KDDI, OpenAI, RealWear, Vuzix, and Westbase.

Atheer offers end-to-end field service management capabilities that have embedded AI functionality. Key functionality includes mobile work order management, warranty/entitlements management, contractor management, augmented/mixed reality, customer portals, business intelligence/analytics, artificial intelligence, machine learning (ML), generative AI, agentic AI, parts management, service collaboration, and wearable support capabilities. Atheer also enables digitized work execution through digital conversion of work instructions, inspections, maintenance, and compliance workflows via no-code AiR Studio, AR-powered remote assistance with real-time video, annotations, and contextual assistance on smart glasses, tablets, and phones. The company also has capabilities in AI copilots and diagnostics, equipment and asset life-cycle management, partner network orchestration, revenue and commercial operations tools, and enterprise integrations with prebuilt connectors/APIs for ERP, CRM, EAM, and MES.

Quick facts about Atheer include the following:

- **Employees:** 55
- **Globalization:** Offering used in 17 countries, offered in 18 languages
- **Industry focus:** Automotive, buildings and infrastructure, oil and gas and energy, pharmaceuticals and biotechnology, process industries, and retail
- **Total number of partners:** Five
- **Deployment and delivery model:** Hosted — private cloud, hosted — public cloud
- **AI enablement:** AI copilots for contextual assistance
- **Large language models (LLMs) supported:** OpenAI

Strengths

- **AR-powered remote assistance, single, unified platform with no-code workflows:** The company's AiR Sessions technology enables remote collaboration with augmented reality annotation features allowing remote experts to interact and guide field technicians in real time. Through this capability, Atheer is able to help its clients improve key metrics such as service resolution time, repair efficiency, and first-time fix rates. Also, through its AiR Studio platform, Atheer is able to help FSM teams configure the application and evolve in support of changing needs without IT dependency or resources.
- **OEM dealer network orchestration and partner compliance:** Atheer is focused on the global deskless workforce market, enabling its digital transformation. Establishing an offering that goes beyond an internal workforce, Atheer addresses the complex challenges of standardizing service quality within dealer and partner networks for its clients. Original equipment manufacturers in particular leverage Atheer's capabilities to deliver consistent, quality outcomes to customers and drive margin for their operations.

Challenges

- **Prebuilt vertical industry offering:** Atheer's primary challenge comes from aftermarket service organizations that prefer industry-specific prebuilt FSM offerings. Atheer supports a broad range of industries; however, it has a horizontal offering that currently isn't prebuilt for a specific industry. Atheer does provide best practice sharing for given industries it has customers in, which provides a road map to success. Atheer does have vertically focused versions of its FSM platform on its near-term road map. Field service organizations expect to work with partners that can support their respective challenges and though

there are many similarities across industries in FSM, industry-specific capabilities prove valuable for a quick return on investment (ROI).

Consider Atheer When

Field service and aftermarket service firms should consider Atheer when they are looking for a technology partner that has prioritized supporting the challenges of the deskless workforce. Atheer has established itself as an innovative technology provider in remote collaborative tools for field service, ensuring organizations that work within complex dealer and contractor networks have the insights to achieve resolution and quality customer outcomes.

IBM

IBM is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide AI-enabled field service management applications.

IBM is a global enterprise technology vendor headquartered in Armonk, New York, United States. IBM Maximo's Service Lifecycle Management (SLM) platform is designed to support complex service operations across asset-intensive industries. IBM has served the field service management market for 10+ years and has customers globally, primarily in North America. IBM has strategic partners in the aftermarket that include IBM Consulting, Interloc Solutions, Aquitas Solutions, Vetasi, MACS, Naviam (formerly Projetech), and ITS Partners.

IBM offers an AI-enabled field service management end-to-end application. Key functionality includes mobile workforce management, mobile work order management, scheduling optimization, dynamic route optimization, warranty/entitlements management, installed base management, service fleet management, contractor management, business intelligence, dispatch management, capacity planning, artificial intelligence, machine learning, deep learning, generative AI, crew/workers geolocation, service collaboration, and remote monitoring/triage capabilities.

Quick facts about IBM include the following:

- **Employees:** 282,200 (400+ aftermarket focused)
- **Globalization:** Offering used in 99+ countries, offered in 20+ languages
- **Industry focus:** Aerospace and defense, manufacturing (discrete and process), energy and utilities, retail, healthcare, services, telecommunications, insurance, and consumer goods
- **Total number of partners:** 2,000+
- **Deployment and delivery model:** On premises, hosted — private cloud, hosted — public cloud

- **AI enablement:** Field value recommendations, problem code recommendations, similarity detection, code conversion automation, and intelligent asset management workflow automation
- **Large language models supported:** IBM watsonx.ai and Granite LLMs

Strengths

- **Configurable, offline mobile capabilities:** IBM's FSM offering is highly configurable and has an offline capable experience tuned for the field service workers and their daily needs. IBM's workflow configurability allows field service teams to adapt mobile processes to specific operational needs without the burden of extensive and often costly customizations. This ability to support configurability as opposed to customizations accelerates deployment and customer adoption. Out-of-the-box functionality allows customers to achieve ROI and business value fast, also ensuring minimal disruption to the operations as the organization modernizes.
- **AI services and application innovations:** IBM is investing heavily in AI and the services that enable AI adoption. IBM has and continues to invest 10–25% of revenue annually specifically for the FSM offering, and the company is also making R&D investments in generative AI to augment its offerings. IBM is able to offer predictive maintenance, intelligence work assignment, and natural language processing, enhancing decision-making while aiding field service teams as they automate tasks. IBM has a focus on delivering business outcomes that ensures AI innovations are targeted and drive near-term value.

Challenges

- **Crowded and fragmented FSM competitive market:** IBM's primary challenge is related to the fragmented nature of the FSM competitive market. Field service organizations rely on a variety of technology applications and often have legacy, homegrown solutions, which cobble together a quiltlike IT framework. IBM offers a broad end-to-end FSM and asset management offering and can be challenged by more niche or industry-specific vendors. Field service organizations expect technology vendors to offer configurable solutions and also enable integrations, regardless of the IT footprint in place. IBM will need to continue to highlight its ability to integrate to point solutions while enabling an end-to-end FSM experience if desired by the client.

Consider IBM When

Field service management firms should consider IBM when looking for an enterprise, end-to-end FSM application that supports complex, distributed service operations. In particular, IBM's offering is purpose-built for asset-intensive industries whereby FSM insights are tightly integrated with asset, inventory, and supply chain data. Field service

organizations and IBM customers in this age of disruption expect scalable, intelligent field service offerings that integrate seamlessly with their respective asset and supply chain ecosystems.

IFS

IFS is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide AI-enabled field service management applications.

IFS is a global aftermarket and field service management technology vendor headquartered in Linköping, Sweden. IFS' field service offering is designed to manage and optimize all aspects of field service operations with the goal of operational efficiency and revenue enhancement. IFS has provided field service offerings in the aftermarket for more than 35 years. The company has customers globally, primarily in North America and Europe, with presence also in Asia/Pacific, Latin America, Africa, and the rest of the world. IFS has strategic partner relationships with Accenture, Arcwide, Baker Tilly, Capgemini, CGI, Deloitte, Help Lightning, IBM, Infosys, KPMG, McKinsey & Company, NEC, PwC, Siemens, Tata Consultancy Services, Tech Mahindra, and Wipro.

IFS offers an end-to-end field service management and aftermarket service life-cycle management offering that has embedded AI and specifically industrial AI functionality. Key functionality includes mobile workforce management; mobile work order management; scheduling optimization; dynamic route optimization; warranty/entitlements management; service contract management; installed base management; service fleet management; HCM; contractor management; augmented/mixed reality; customer portal; business intelligence; dispatch management; service demand forecasting; capacity planning; artificial intelligence; machine learning; deep learning; generative AI; agentic AI; parts, material, and returns management; crew/workers geolocation; service collaboration; remote monitoring/triage; and service CPQ capabilities. IFS also offers outbound and inbound service execution, last-mile portal, shift planning, service catalog, service parts logistics, IoT, contact center, project management, ERP integration, pricing, analysis models, failure analysis, and native mobile capabilities.

Quick facts about IFS include the following:

- **Employees:** 7,000+ (2,381 aftermarket and field service focused)
- **Globalization:** Offering used in 90+ countries, offered in 17 languages
- **Industry focus:** Aerospace and defense; construction and engineering; energy, utilities, and resources; manufacturing; service providers; and telecommunications
- **Total number of partners:** >400

- **Deployment and delivery model:** On premises, hosted — private cloud, hosted — public cloud
- **AI enablement:** Industrial AI platform (IFS.ai) incorporating over 200 capabilities augmented by IFS Nexus Black innovation program accelerating AI adoption within industrial organizations
- **Large language models supported:** Azure OpenAI Service, with the ability to plug-in additional models along with RAG

Strengths

- **Industry focused:** IFS is focused on six core industries and has established its offerings to meet the evolving needs of those markets. IFS is also able to deliver last-mile differentiation encompassing industry-specific use cases and over the past few years deployed AI use cases per industry. The company provides success teams dedicated to the industry with asset life-cycle domain expertise to deliver a complete engagement from investment, planning, strategy, operations, and execution.
- **Every service model, one platform for service, projects, and assets:** Whether field, remote, projects, depot, or outcome based, IFS is able to provide technology innovations to support a diverse set of service activities and models. The company is now replacing first-generation scheduling solutions at a number of clients, delivering real-time dynamic scheduling and multi-time horizon planning (MTHP) — from one year, one month, and one week to one day and one minute with capabilities that advance how companies schedule today based on not only hard skills and customer needs but also soft skills that are increasingly part of the transition of a technician to a trusted advisor.

Challenges

- **Brand awareness within IT and the understanding of the value of field service–specific offerings:** The primary challenge facing IFS is brand recognition within IT organizations that are not tuned into the aftermarket or field service space. There are still a number of manufacturers and service organizations that are just now entering the world of digital modernization and transformation. These companies have legacy enterprise technologies and need to be informed of the value and opportunity for rapid innovation when leveraging field service–specific tools and technologies. IFS will need to continue to penetrate functions within organizations beyond the service team to grow awareness around its offerings.

Consider IFS When

Field service and aftermarket service firms should consider IFS when they are looking for a technology partner that is focused on delivering industry-specific offerings to support the complex needs of industrial markets. IFS has established its industrial AI capabilities that are tuned to the specific needs of industrial markets like aerospace and defense; construction and engineering; energy, utilities, and resources; manufacturing; service providers; and telecommunications. These industries have often been considered to be laggards with regard to innovation and specifically AI innovations, but as technology vendors like IFS focus on these markets, transformation can catch up.

KloudGin

KloudGin is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide AI-enabled field service management applications.

KloudGin is a field service management technology vendor headquartered in Sunnyvale, California, United States. KloudGin has delivered capabilities for the field service market for nine years. KloudGin has a unified field service, work, and asset management offering, with a focus on the utility and public sector while delivering capabilities to a variety of other industries. The company primarily has customers in North America and Latin America. KloudGin has built strategic partnerships with Verticals, Amazon Web Services, American Gas Association, American Water Works Association, Black & Veatch, Cognizant, Edison Electric Institute, Esri, EY, NAWC, Oracle NetSuite, Red Clay, SAP, and VertexOne.

KloudGin has AI-embedded functionality in support of its field service management offering. Key functionality includes mobile workforce management; mobile work order management; scheduling optimization; dynamic route optimization; warranty/entitlements management; service contract management; installed base management; service fleet management; HCM; contractor management; customer portal; business intelligence; dispatch management; capacity planning; artificial intelligence; machine learning; generative AI; agentic AI; parts, material, and returns management; crew/workers geolocation; service collaboration; and remote monitoring/triage capabilities.

Quick facts about KloudGin include the following:

- **Employees:** 180+
- **Globalization:** Offering used in six countries, offered in three languages

- **Industry focus:** Manufacturing (discrete and process), services, telecommunications, consumer goods, electric and gas, water and wastewater, and municipalities
- **Total number of partners:** <15
- **Deployment and delivery model:** Hosted — private cloud, hosted — public cloud
- **AI enablement:** Embedded AIQ such as KloudGin Analytics and BI, smart summarize work orders, crew insight, AI/ML scheduling, predictive asset failure, and Sprocket; Agentic AIQ such as AI field tech agent and AI dispatcher agent
- **Large language models supported:** Sonnet, Haiku, and LLaMA

Strengths

- **AI/ML-based scheduling engine:** KloudGin offers a robust AI and machine learning–based field service scheduling optimization engine. KloudGin is able to support both full plan and intraday rapid plan optimization using real-time traffic, weather, crew expertise, SLA requirements, and task types to ensure efficient scheduling and dispatch. KloudGin's offering is also flexible, configurable, and extensible, allowing the company to support a variety of client needs and levels of field service maturity.
- **Built-in GIS integration and advanced capabilities:** KloudGin offers seamless integration with Esri ArcGIS allowing its clients the ability to view and interact with spatial data, assets, and work orders directly from maps via the web or mobile device. KloudGin is able to support its customers that often work in markets that have linear asset needs, which adds a layer of complexity to scheduling, dispatching, and executing on a work order. The ability to have a broad set of data in real time is critical to success in these more complex environments.

Challenges

- **Global reach and brand awareness:** The primary challenge facing KloudGin is its current penetration into global markets and industries beyond its core. KloudGin is growing but still has to overcome awareness issues as it expands beyond the utilities and telecommunications markets. There are a number of incumbents in industries that KloudGin is looking to enter, and the company will need to continue to communicate its capabilities to support a wide range of FSM-specific use cases.

Consider KloudGin When

Field service and aftermarket service firms should consider KloudGin when they are looking for a partner that has a focused offering for the utilities and public sector,

which includes electric and gas, water and wastewater, and municipalities. KloudGin supports its clients with a unified field service, work, and asset management platform, which is intuitive, flexible, and built for the field operations. KloudGin's current core industries provide a road map for how the company can address broader industries and those industries that are rapidly looking to innovate and transform through digital tools.

Microsoft

Microsoft is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide AI-enabled field service management applications.

Microsoft is a global enterprise technology vendor that supports the aftermarket and field service management headquartered in Redmond, Washington, United States. Microsoft is focused on digitalizing the frontline workforce with an AI-driven application suite to manage, schedule, and perform work. Microsoft has provided field service offerings in the aftermarket for more than 20 years. The company has customers globally in North America, Europe, Asia/Pacific, Latin America, Africa, and the rest of the world. Microsoft has strategic partnerships specific to field service and the aftermarket with companies such as Accenture/Avanade, Capgemini, DXC Technology, EY, HCL, Hitachi Solutions, Orbis, Unisys, Velosio, and Velrada.

Microsoft offers an end-to-end field service management and frontline team offering that has embedded AI functionality. Key functionality includes mobile workforce management; mobile work order management; scheduling optimization; dynamic route optimization; warranty/entitlements management; service contract management; installed base management; HCM; contractor management; augmented/mixed reality; customer portal; business intelligence; dispatch management; artificial intelligence; machine learning; deep learning; generative AI; agentic AI; parts, material, and returns management; crew/workers geolocation; service collaboration; wearable support; and remote monitoring/triage capabilities. Microsoft also provides seamless collaboration through Microsoft 365 integrations.

Quick facts about Microsoft include the following:

- **Employees:** 228,000
- **Globalization:** Offering used in 243 countries, offered in 45 languages
- **Industry focus:** Aerospace and defense, manufacturing, energy and utilities, retail, healthcare, services, telecommunications, insurance, and consumer goods
- **Total number of partners:** >250
- **Deployment and delivery model:** Hosted — public cloud

- **AI enablement:** Voice agents and digital agents, AI routing, copilot, consumption-based agent, Scheduling Operations Agent, AI inspection capabilities
- **Large language models supported:** OpenAI, extensibility with Copilot Studio, which integrates with OpenAI foundation models and offers third-party and custom models through Azure Foundry (Customers may use their own foundation model licenses to utilize AI.)

Strengths

- **Autonomous agents and copilot:** Microsoft has been investing and delivering AI functionality for field service within this AI wave, which began in earnest a few years ago. Microsoft has infused AI capabilities and continuous innovation through its copilot and autonomous AI agents with extensibility via Copilot Studio. Microsoft provides an extensible platform designed to empower customers to build and bring their own agents into their unique workflows. The company has also established a Scheduling Operations Agent for field service. From generative AI to agentic AI, Microsoft continues to innovate to help its client achieve tangible value specifically for frontline workers.
- **Fully integrated with IoT out of the box along with breadth of enterprise platform:** Microsoft is focused on delivering a Better Together strategy with its 2025 priorities. The company is not only ensuring it can connect field service with its clients ERP and project management infrastructure but also integrating rich asset data through IoT out of the box. Avoiding the high cost of customization, Microsoft has an enterprise composability framework that delivers quick time to value for its customers. This approach also helps clients stay agile. This agility has also led to Microsoft prioritizing functionality like offline capabilities, ensuring its clients that demand this level of connectivity to achieve safety and continuity in the field.

Challenges

- **Generalist approach to the front line:** Microsoft delivers a broad set of end-to-end functionality for the frontline worker and has established a robust offering. The primary challenge facing Microsoft is ensuring its vast capabilities and rapid innovations in AI are tangible for the specific needs of a given industry use case or client need. As an enterprise vendor, it can be difficult to make each offering granular enough for all customers in all industries and for all company sizes. Microsoft customers can leverage Microsoft's network of partners to help customize the solution to their needs.

Consider Microsoft When

Field service and aftermarket service firms should consider Microsoft when they are looking for a technology partner that has invested heavily in AI and agentic AI for the enablement of the frontline team. Microsoft continues to roll out new functionality and innovations that are integrated in its broader set of tools. Microsoft is an enterprise vendor with the wide range of products that can meet many of the needs of an IT organization that is embarking on an enterprisewide business transformation.

Nomadia

Nomadia is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide AI-enabled field service management applications.

Nomadia is a field service management technology vendor headquartered in Paris, France and has supported this market for more than 30 years. Nomadia primarily has customers in Europe but also has some clients in North America, Asia/Pacific, Latin America, Africa, and the rest of the world. Nomadia has strategic partner relationships with Comarch Healthcare, HERE, Honeywell, Inetum, Logic Lever, Microsoft, Orange Business, Sopra Steria, SUEZ Smart Solutions, WalkMe, and WebFleet.

Nomadia offers an end-to-end field service management offering that has embedded AI functionality. Key functionality includes mobile workforce management, mobile work order management, scheduling optimization, dynamic route optimization, contractor management, customer portal, business intelligence, dispatch management, service demand forecasting, capacity planning, artificial intelligence, machine learning, deep learning, generative AI, crew/workers geolocation, and service collaboration capabilities.

Quick facts about Nomadia include the following:

- **Employees:** 300+ (110 aftermarket service employees)
- **Globalization:** Offering used in 95 countries, offered in 12 languages
- **Industry focus:** Aerospace and defense, manufacturing, energy and utilities, retail, healthcare, telecommunications, insurance, fast-moving consumer goods (FMCG), luxury, ecommerce and distribution, and audit, control, and services
- **Total number of partners:** <50
- **Deployment and delivery model:** Hosted — private cloud, hosted — public cloud
- **AI enablement:** Auto-learning AI travel model, speech AI, vision AI, predictive AI, and generative AI

- **Large language models supported:** Mistral Small, Mistral Medium, Mistral Large, and Pixtral

Strengths

- **Human-centered field service innovation:** Nomadia is focused on delivering field service tools and capabilities that deliver value to the technician. Technician empowerment, engagement, and utility are key drivers for Nomadia's field service application. The company is invested in reinventing mobility for the benefit of the human and not just for operational efficiency. Nomadia's customers can adjust the scheduling algorithm to better balance workloads, reprioritize technician-focused or customer-focused constraints, and set rules to lessen worker travel overall.
- **Building vertical expertise:** Nomadia recently made a few acquisitions that have bolstered its industrial vertical capabilities and domain expertise. These acquisitions combined with organic investments have enabled Nomadia to drive new disruptive innovations that are industry and use case focused for the benefit of a wide variety of customers. These investments have also allowed Nomadia to accelerate time to value and ROI for its customers at the offering is more personalized to solve the challenges of a given industry.

Challenges

- **Global partner ecosystem:** Nomadia's primary challenge is the company's partner ecosystem beyond the European region. Nomadia has a strong presence and a level of awareness in Europe, but the company remains lesser known outside of Europe. To expand at the pace the company has set as a target, it will need to expand its footprint beyond its current markets. One way to accelerate growth into new markets is to formalize strategic partnerships with a wide variety of global systems integrators, managed service providers, application partners, cloud partners, agency partners, resellers, and white label partners. Nomadia's organic and inorganic growth strategy highlights the company's intentions that can only be bolstered with a more robust global partner ecosystem.

Consider Nomadia When

Field service and aftermarket service firms should consider Nomadia when they are looking for partner that can support the needs of large and medium-sized business-to-business (B2B) and B2B2C organizations looking to manage, optimize, and digitize the field operations. Nomadia is able to enhance the beginning of field service processes with planning and route optimizations processes down to the SLA compliance and task completion. Nomadia focuses on the specific needs of each industry, delivering tailored solutions that align with real-world field constraints.

Oracle

Oracle is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide AI-enabled field service management applications.

Oracle is a global enterprise technology vendor, which offers capabilities in the aftermarket and field service management industry, headquartered in Austin, Texas, United States. Oracle has provided field service management capabilities for over 20 years. Oracle's field service management offering is a comprehensive, cloud-native field service management platform designed to help organizations efficiently schedule, route, and support mobile workers. The company have customers globally in North America, Europe, Asia/Pacific, Latin America, Africa, and the rest of the world. Oracle has a strategic partnership relationship with companies specifically in FSM such as Accenture, AmberLeaf, Apex IT, Aquant, CareAR, Deloitte, edX, Esri, eVerge, Front Door, G7, Helix, Leadent, PwC, and Speridian.

Oracle provides an end-to-end field service management and aftermarket offering that has embedded AI functionality. Key functionality includes mobile workforce management; mobile work order management; scheduling optimization; dynamic route optimization; warranty/entitlements management; service contract management; installed base management; service fleet management; HCM, contractor management; customer portal; business intelligence; dispatch management; service demand forecasting; capacity planning; artificial intelligence; machine learning; deep learning; generative AI; agentic AI; parts, material, and returns management; crew/workers geolocation; service collaboration; remote monitoring/triage; service CPQ; and gamification capabilities. Oracle also supports AI-based routing, scheduling, and universal booking; nearby work recommendations; and continuous routing reoptimization. As part of its Oracle Asset-Based Service offering, Oracle also supports installation and projects, self and assisted service, preventative maintenance, depot repair, and field repair.

Quick facts about Oracle include the following:

- **Employees:** 160,000 (18,000 in customer support and service)
- **Globalization:** Offering used in ~175 countries, offered in 34 languages
- **Industry focus:** Aerospace and defense, manufacturing (discrete and process), energy and utilities, retail, healthcare, services, telecommunications, insurance, and consumer goods
- **Total number of partners:** >250
- **Deployment and delivery model:** Hosted — private cloud, hosted — public cloud

- **AI enablement:** Agent-assisted service, AI-based routing, AI-based scheduling, Oracle Digital Assistant, chat summarization, web chat response assistant, service request classification, service request summarization, service request triage agent, service request resolution agent, next best action, knowledge article from service request, AI-powered work duration predictions, AI-powered travel time predictions, and AI-recommended activity duration and travel keys
- **Large language models supported:** Cohere and Meta; Oracle has its own LLM (Customers may use their own foundation model licenses to utilize AI.)

Strengths

- **The Fusion platform:** Oracle has recently completed the expansion of its Fusion platform user interface to its FSM offering. The field service application connects natively to other Oracle Fusion applications and integrates without friction to third-party cloud or on-premises systems through an open API framework. The platform is highly configurable, allowing organizations of various size and across any region or complexity level to tailor the offering to their unique field service needs. Oracle has a Plug-in Library that provides prebuilt, out-of-the-box plug-ins that can be used as-is or modified. Oracle has also prioritized AI-embedded functionality within the offering ensuring it supports a robust list of field service–specific use cases, which continue to evolve.
- **End-to-end customer experience (CX) platform:** Oracle includes field service management in its broader CX framework along with sales, customer service, and marketing. This alignment enables Oracle to aid its clients in the shift to more customer-centric field service operations. Historically, field service organizations have struggled with information siloed from the rest of the enterprise. Oracle, through its end-to-end CX approach, is looking to help its clients break down silos of data and insights to better inform decisions across the business for the benefit of the service organization and the customer experience.

Challenges

- **Market awareness and industry perception:** Oracle's primary challenge is market awareness of the company's value proposition. The company has long been seen primarily as an ERP provider with a broad portfolio of additional products. In recent years, however, Oracle has significantly enhanced its Redwood user interface and expanded its CX capabilities, helping shift perceptions of its role in the market. Even with these advancements, Oracle must continue to clearly demonstrate its ability to address aftermarket needs and ensure awareness of its Field Service offering. While the solution integrates with any third-party system, Oracle also provides an out-of-the-box, end-to-end suite that requires no integration when used in full. In today's dynamic environment, it is essential for Oracle to reinforce that it can support FSM operations in any IT landscape.

Consider Oracle When

Field service and aftermarket service firms should consider Oracle when they are looking for a technology partner that can scale seamlessly, supporting organizations with as few as 5 to as many as 100,000 field service resources, without compromising performance. Oracle's flexibility, scalability, configurability, offline functionality, and backward compatibility have consistently enhanced field productivity. This approach has led to innovations like AI-based routing, scheduling, and universal booking. Oracle's out-of-the-box functionality is primed to support a variety of industries and maturity levels within the field service landscape.

OverIT

OverIT is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide AI-enabled field service management applications.

OverIT is a field service management technology company headquartered in Fiume Veneto, Italy and has served the FSM market for over 25 years. OverIT is 100% focused on the field service market providing integration with CRM, enterprise asset management, ERP, GIS, IoT, smart grid, and billing. The company has clients primarily in Europe but also has some customers in North America and Latin America. OverIT has strategic partnerships with Accenture, Accruent, Almaviva, Atos, Ayesa, BIP, BVS, Cadsyst, CBT Technologies, Celerity, CGI, Cima Data Analytics (RCI), Cognizant, DXC, DX Global Services Engineering, Epson, Euclides, Esri, Eviden, Factor CX, Geoxite, IBM, Implemental Systems, Indra, Inetum, Infosys, Iriun, Leadent, Lutech, NTT, PwC Realwear, Reply, SAP, Siemens, Soft Strategy, TCS, Tech Mahindra, Telespazio, and Wipro.

OverIT offers an end-to-end field service management and aftermarket service life-cycle management offering that has embedded AI functionality. Key functionality includes mobile workforce management; mobile work order management; scheduling optimization; dynamic route optimization; installed base management; service fleet management; HCM; contractor management; augmented/mixed reality; customer portal; business intelligence; dispatch management; service demand forecasting; capacity planning; artificial intelligence; machine learning; deep learning; parts, material, and returns management; crew/workers geolocation; service collaboration; wearable support; and remote monitoring capabilities. OverIT also provides capabilities for GIS and FSM integration and also industry templates.

Quick facts about OverIT include the following:

- **Employees:** 600
- **Globalization:** Offering used in 30 countries, offered in 15 languages
- **Industry focus:** Aerospace and defense, manufacturing (discrete and process), energy and utilities, retail, healthcare, services, telecommunications, insurance, consumer goods, and transportation
- **Total number of partners:** <75
- **Deployment and delivery model:** On premises, hosted — private cloud, hosted — public cloud
- **AI enablement:** Scheduling optimization, spare parts recommendation, meter reading assistant, virtual assistant, vision debrief, AI-driven knowledge management, and real-time translation
- **Large language models supported:** NA at this time

Strengths

- **Industry focus and depth:** OverIT is primarily focused on supporting linear asset industries with field service offerings. The company has a direct sales organization focused on its core industries. OverIT has also established close alignment with linear asset industry associations to ensure it can align with industry trends and build that into its generally available products. This organizational approach to tackling the challenges of this industry allows OverIT to enhance a level of depth of knowledge and expertise, which ensures customers can rapidly see value from the partnership.
- **Platform built together with customers:** OverIT prides itself on working with its customers around product innovation, which is built for the needs of the market. OverIT's road map is customer driven and the company is invested in a culture of coinnovation. This culture allows OverIT to build simple solutions that can be easily adopted. In complex industries it is imperative that technology vendors provide tailored offerings that can meet the unique needs of the marketplace.

Challenges

- **Transactional or commodity-focused buyers:** The primary challenge is that OverIT is a technology buyer that primarily views digital tools as a commodity or a transaction. This mindset permeates some decisions even in a B2B environment as buyers bring in their own consumer biases. OverIT deems itself to be a relationship partner and not a transactional application provider. Despite this model, OverIT will need to overcome buyer trends as it looks to expand into broader markets globally.

Consider OverIT When

Field service and aftermarket service firms should consider OverIT when they are looking for a technology partner that is focused in managing linear asset industries. OverIT supports business-to-business organizations of medium to large sizes that operate in medium to highly complex scenarios in technical and commercial field service models. Companies should consider OverIT if they are looking for a vendor that is 100% focused on field and want to partner with an enterprise-grade FSM offering, which is innovating solely on driving efficacy in the field service market.

Praxedo

Praxedo is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide AI-enabled field service management applications.

Praxedo is a field service management technology vendor headquartered in Paris, France and has served this market for 20 years. Praxedo is a 100% SaaS multitenant offering for the field service market. The company has customers primarily in Europe but also has clients globally. Praxedo has strategic partner relationships with Accenture, Atos, Bearing Point, Boston Consulting Group, Capgemini, EY, IBM, KPMG, McKinsey, Microsoft, Sage, SAP, and Wavestone.

Praxedo offers an end-to-end field service management and aftermarket service life-cycle management offering that has embedded AI functionality. Key functionality includes mobile workforce management; mobile work order management; scheduling optimization; dynamic route optimization; warranty/entitlements management; service contract management; installed base management; contractor management; augmented/mixed reality; customer portal; business intelligence; dispatch management; service demand forecasting; capacity planning; artificial intelligence; machine learning; deep learning; generative AI; parts, material, and returns management; crew/workers geolocation; service collaboration; wearable support; service CPQ; and gamification capabilities.

Quick facts about Praxedo include the following:

- **Employees:** 182
- **Globalization:** Offering used in 40 countries, offered in 8 languages
- **Industry focus:** Telecommunications, services, energy and utilities, among others
- **Total number of partners:** <75
- **Deployment and delivery model:** Hosted — private cloud, hosted — public cloud

- **AI enablement:** Praxedo Automatic SmartScheduler — that continuously optimize technician's workloads in real-time, AI-enabled photo analysis
- **Large language models supported:** Gemini 2.5 Flash supported by Vertex AI (Customers may use their own foundation model licenses to utilize AI.)

Strengths

- **Rapid deployment and offering rollout:** Praxedo's field service offering has a typical implementation duration of approximately two months with more complex projects averaging between three and six months. This implementation process requires minimal workforce training or extensive configuration using a single, integrated web interface. In an environment where one of the top concerns for organizations is achieving fast time to value, the ability to deploy an FSM application quickly can be a crucial success factor. Praxedo is able to also support an out-of-the-box offering that doesn't require the support of a professional services partner for customizations or implementation.
- **Openness, integrations, and a robust public API:** Praxedo recognizes field service organizations have a wide range of technology applications within their respective IT infrastructure. The ability to integrate data sets and processes enabling insight across the enterprise can be a challenge and when executed well a differentiator. Praxedo's open architecture allows the company's clients the flexibility to work in a variety of technology environments and still provide the field service team with the insights to execute work efficiently.

Challenges

- **Enterprise vendors versus niche players:** The primary challenge facing Praxedo is enterprise applications that offer field service management capabilities along with a broader suite of technology offerings like CRM, enterprise asset management, supply chain, or ITSM. Despite market willingness to accept a niche technology offering, some IT teams are reluctant to partner with a large number of vendors and are looking to consolidate their respective technology spend. This shift in the market will require Praxedo to highlight the benefits of having an FSM-focused technology partner and also the ease to which its offering can be integrated with other applications within an organization's given technology infrastructure.

Consider Praxedo When

Field service and aftermarket service firms should consider Praxedo when they are looking for a technology partner that is focused on the field service market and specifically those field service organizations that have a mix of installation, maintenance, and emergency jobs. Praxedo offers a rapid deployment process and helps its clients achieve value quickly. The company is R&D focused and works with field service organizations to establish an environment of innovation, collaboration, and transformation without the need for integration partners or consultants.

PTC

PTC is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide AI-enabled field service management applications.

PTC is an enterprise software provider supporting the intelligent product life cycle with deep service and aftermarket solutions and expertise, headquartered in Boston, Massachusetts, United States. PTC has provided field service offerings in the aftermarket for more than 20 years. PTC enables the service and maintenance of physical products allowing organizations to plan and execute critical work. The company has customers globally, primarily in North America and Europe, with presence also in Asia/Pacific, Latin America, and the rest of the world. PTC has key strategic partnerships specifically for the aftermarket and field service with Accenture-OnProcess, Amazon Web Services, Capgemini, Cognizant, Deloitte, Infosys, ITC Infotech, Kalypso, L&T Technology Services, Microsoft, Rusty Beetle, Salesforce, Tata Consultancy Services, Tech Mahindra, and Trax.

PTC offers an end-to-end field service management and aftermarket service life-cycle management offering that has embedded AI functionality. Key functionality includes mobile workforce management; mobile work order management; scheduling optimization; dynamic route optimization; warranty/entitlements management; service contract management; installed base management; service fleet management; HCM; contractor management; augmented/mixed reality; customer portal; business intelligence; dispatch management; service demand forecasting; capacity planning; artificial intelligence; machine learning; deep learning; generative AI; agentic AI; parts, material, and returns management; crew/workers geolocation; service collaboration; wearable support; remote monitoring/triage; service CPQ; and gamification capabilities. PTC's FSM brings AI into the flow of work with the company's AI assistant for insights via chat and its AI actions that automates service processes. Whether on mobile or web, technicians and service teams get context-specific insights on assets, parts, and service history while AI agents coordinate tasks to speed resolution and reduce manual effort. The FSM product also operates as a hub of as-maintained data on customer or owner/operator assets leveraging data from PLM systems and IoT-connected asset data.

Quick facts about PTC include the following:

- **Employees:** >7,000 (850+ aftermarket service focused)
- **Globalization:** Offering used in 100+ countries, offered in 20+ languages
- **Industry focus:** Aerospace and defense, manufacturing (discrete and process), energy and utilities, retail, healthcare, services, telecommunications, and consumer goods

- **Total number of partners:** 1,000+ global partners
- **Deployment and delivery model:** hosted — private cloud, hosted — public cloud
- **AI enablement:** AI assistant for field service knowledge, asset information, and scheduling; AI action workflow automation for work order summarization, installed base insights, among other capabilities
- **Large language models supported:** Microsoft GPT models and AWS Claude

Strengths

- **Seamless integration with PTC's digital thread and enterprise platform:** PTC has long supported the concept of a closed-loop digital thread of data that flows between the physical and digital process for manufacturers and asset-focused organizations. PTC continues to innovate to ensure the aftermarket, and the field service industry in particular, not only can take action based on real-time, intelligence-driven insights from engineering, design, and quality teams but also can deliver critical feedback to those teams to drive continuous improvement. PTC is now also offering enterprise-grade AI-enabled innovations specific for the aftermarket that are delivering new revenue streams, enhanced field service outcomes, and higher levels of operational efficiency.
- **Asset-centric model tuned to support complex work in regulated industries:** PTC has a long-standing history of supporting asset-intensive industries. These industries come with complex challenges and customer requirements. PTC delivers an offering built to support field workforces across multiple models — OEM only, OEM with dealer networks, OEM with partners or contractors, or independent service organizations — and to address long life-cycle assets, mission-critical equipment, and complex service processes involving both short-duration and long-duration work. In addition, PTC has developed the integration and flow of data from service back to engineering, creating a continuous feedback loop that strengthens further design and quality decisions.

Challenges

- **Field service data that informs competitive engineering solutions/platforms:** PTC has been able to integrate data within its products like Windchill. As PTC's field service offering continues to expand into asset-centric service organizations that have legacy PLM or non-PTC products, the ability to seamlessly integrate data from the field to the engineering team will need to continue to be addressed. Too often data from the field is siloed off from other functions and this is a clear opportunity for exponential value creation. As the field service market and service organizations continue to operate in a fragmented technology landscape, vendors that can excel in integrations will be differentiated.

Consider PTC When

Field service and aftermarket service firms should consider PTC when they are looking for a partner that is focused on organizations that produce or service complex long life-cycle assets and have dedicated service teams often of 100+ technicians. PTC is not solely focused on scheduling but on ensuring that field service decisions such as scheduling are connected with the right asset data to improve issue resolution. PTC recognizes it is no longer good enough for a technician to show up to a customer site on time if they don't have the data-driven insights to make the right decisions to achieve resolution on that visit.

Salesforce

Salesforce is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide AI-enabled field service management applications.

Salesforce is a global enterprise technology provider headquartered in San Francisco, California, United States. Salesforce has provided field service management offerings in the aftermarket for 16 years. Salesforce is a comprehensive, AI-powered platform that enables organizations to deliver quality onsite service experiences. The company supports customers globally and has a global partner ecosystem, which includes Accenture, Capgemini, Deloitte, McKinsey, and PwC.

Salesforce offers an end-to-end aftermarket and field service management offering that has embedded AI functionality. Key functionality includes mobile workforce management; mobile work order management; scheduling optimization; dynamic route optimization; warranty/entitlements management; service contract management; installed base management; contractor management; customer portal; business intelligence; dispatch management; service demand forecasting; capacity planning; artificial intelligence; machine learning; generative AI; agentic AI; parts, material, and returns management; service collaboration; remote monitoring/triage; service CPQ; and gamification capabilities. Salesforce also is able to provide a natively unified offering embedded within the Salesforce Customer 360 platform, which incorporates insights from CRM, sales, and service, as well as Salesforce Data Cloud, Revenue Cloud, Commerce Cloud, Marketing Cloud, Slack, and Tableau.

Quick facts about Salesforce include the following:

- **Employees:** 76,453 (as of January 31, 2025)
- **Globalization:** Fully supported in 18 languages
- **Industry focus:** Field service offering specifically focused on manufacturing and automotive, energy and utilities, telecommunications, healthcare and life sciences, technology, financial services, retail, and installation services

- **Total number of partners:** 16,000+
- **Deployment and delivery model:** Hosted — public cloud
- **AI enablement:** Prebuilt industry-specific actions, consumption dashboards and transparency of digital wallet, dedicated resources to coinnovate and help with adoption of AI agents, partner enablement and adoption of Agentforce, dedicated AI specialist certification, and 80+ modules on Trailhead
- **Large language models supported:** Anthropic (Bedrock), AzureOpenAI, OpenAI, and Google (VertexAI); support for customer bring your own (BYO) LLM

Strengths

- **Unified platform for the customer life cycle:** Salesforce's field service offering, while available standalone, is natively built on the Salesforce CRM platform, enabling connected experiences across functions of work within the customer life cycle. This framework provides FSM organizations with a seamless experience connecting customer interactions, from initial contact and sales to service delivery and follow-up. This unified data model has the ability to eliminate silos, provide a 360-degree view of the customer and asset data, and enable intelligent decision-making across the entire customer life cycle.
- **Agentforce AI in the field service workflow:** Salesforce has heavily invested in its AI, encapsulating predictive AI, generative AI, and agentic AI capabilities. Field service organizations can adopt out-of-the-box solutions or create custom agents to support their unique business processes. The AI innovations are rooted in field service processes, enabling organizations to transform their operations, improving efficiency and the customer and worker experience. Salesforce continuously rolls out new AI innovations and is able to ensure customers can rapidly adopt these new capabilities, which is crucial to value realization.

Challenges

- **Market inertia and risk aversion to digital transformation:** The field service market is currently at a point of digital modernization and change. The primary challenge facing Salesforce is the relative reluctance for some organizations within field service and industrial markets to adopt rapid change. Specifically in AI, the aftermarket consists of a variety of industries that may take a "wait and see" approach to technology investments. To combat this, Salesforce will need to continue to highlight the near-term impact and opportunity with agentic AI and the value it can provide to enhancing the field service operation. Salesforce has launched programs supported with forward deployed engineers who are embedded with customers to support implementation and large-scale adoption efforts.

Consider Salesforce When

Field service and aftermarket service firms should consider Salesforce when they are looking for a technology vendor that has the ability to integrate the end-to-end customer life cycle and also deliver support for individual field service processes if preferred. The full value of Salesforce comes from connecting the end-to-end customer life cycle whereby field service, sales, marketing, and commerce teams can leverage insights to deliver a 360-degree view of experiences. Salesforce works with clients to provide both a customer and an asset focus that can drive revenue streams, efficiency, and customer satisfaction.

SAP

SAP is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide AI-enabled field service management applications.

SAP is a global enterprise technology vendor headquartered in Walldorf, Germany and has supported the field service management market for over 50 years. SAP is a cloud-based offering designed to optimize field service operations. The company supports clients globally in North America, Europe, Asia/Pacific, Latin America, and Africa. SAP has major strategic partnerships with Accenture, Deloitte, EY, Proaxia, and Vass along with a large, globally diverse partner ecosystem.

SAP offers end-to-end aftermarket and field service management capabilities that have embedded AI functionality. Key functionality includes mobile workforce management; mobile work order management; scheduling optimization; dynamic route optimization; service contract management; installed base management; HCM; contractor management; customer portal; business intelligence; dispatch management; service demand forecasting; capacity planning; artificial intelligence; machine learning; generative AI; parts, material, and returns management; crew/worker geolocation; remote monitoring/triage; and service CPQ capabilities.

Quick facts about SAP include the following:

- **Employees:** 109,000+
- **Globalization:** Offering used in 60 countries, offered in 35 languages
- **Industry focus:** Industrial manufacturing, utilities, professional services, engineering, construction operations, mill products and mining, wholesale distribution, automotive, telecommunications, high-tech, life sciences, public sector, healthcare, oil and gas, travel and transportation, and retail
- **Total number of partners:** >250
- **Deployment and delivery model:** Public cloud

- **AI enablement:** AI-based scheduling optimization, Business AI, and SAP Joule
- **Large language models supported:** Aleph Alpha, Anthropic, AWS, Cohere, Google Cloud, IBM, OpenAI, Meta, Microsoft, and Mistral AI

Strengths

- **End-to-end FSM offering as part of the full enterprise suite:** SAP field service management is a fully integrated component of the SAP Business Suite, enabling end-to-end business process execution across planning, logistics, operations, finance, and customer service. It connects seamlessly with core SAP solutions such as SAP S/4HANA, customer experience, asset management, and supply chain management, ensuring that service delivery is fully aligned with enterprisewide processes. This deep integration eliminates silos, enables real-time collaboration across departments, and supports consistent, efficient service execution across the entire value chain.
- **AI innovations and generative AI capabilities:** SAP FSM is infused with AI and generative AI to simplify and accelerate service delivery. SAP is able to support generative summaries of equipment history, work orders, and past service activities. SAP has established an embedded AI copilot for field service that enables users to execute commands, automate actions, and retrieve context-aware insights using conversational language with the benefit of boosting productivity and responsiveness across the service life cycle. SAP also has a robust auto-scheduling engine designed for complex, high-volume service operations.

Challenges

- **Perceived cost and value realization:** The primary challenge facing SAP is that smaller or midmarket field service organizations may have a perception that SAP is only suited for enterprise organizations that leverage the entire suite inclusive of ERP and other SAP applications. SAP will need to address this perception effectively communicating and demonstrating the cost competitiveness and value of SAP's offerings to potential customers. Educating the market about the cost-effectiveness and the comprehensive benefits, such as integration capabilities and long-term efficiency gains, can help overcome this perception and highlight SAP's value proposition.

Consider SAP When

Field service and aftermarket service firms should consider SAP when they are looking for a partner that is suitable for all sizes of field service operations across various industries and work types. SAP is able to support field service organizations with a wide range of users and currently has customers ranging from 10 to 15,000 users. SAP can deliver support for FSM organizations that are looking for a standalone offering or a

vendor, which offers its own additional enterprise applications such as ERP. SAP recognizes the opportunity of this current AI era and also is keen to embed AI innovations into FSM and help service organizations innovate for the future.

ServiceNow

ServiceNow is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide AI-enabled field service management applications.

ServiceNow is a global enterprise technology provider headquartered in Santa Clara, California, United States. The company has provided support for the field service and aftermarket service industries for over 20 years. ServiceNow offers a single platform delivering end-to-end offerings online or offline. The company supports clients globally in North America, EMEA, Asia/Pacific, and Latin America. ServiceNow has strategic partnership relationships specifically in the aftermarket with over 900 certified implementation partners including Accenture, Cognizant, and Deloitte.

ServiceNow offers end-to-end field service management capabilities that have embedded AI functionality. Key functionality includes mobile workforce management; mobile work order management; scheduling optimization; dynamic route optimization; warranty/entitlements management; service contract management; installed base management; contractor management; customer portal; business intelligence; dispatch management; service demand forecasting; capacity planning; artificial intelligence; machine learning; deep learning; generative AI; agentic AI; parts, material, and returns management; crew/worker geolocation; service collaboration; remote monitoring/triage; service CPQ; and gamification capabilities. The company is also able to support territory management and a field service marketplace.

Quick facts about ServiceNow include the following:

- **Employees:** 27,000
- **Globalization:** Offered in 24 languages
- **Industry focus:** Public sector, technology, manufacturing, healthcare, retail, telecommunications, and financial services
- **Total number of partners:** >250
- **Deployment and Delivery Model:** On premises, hosted — private cloud, hosted — public cloud
- **AI enablement:** Agentic Workflow, AI Agent Orchestrator with AI Control Tower, AI agent, AI Agent Studio, AI tools, and AI and consumption license dashboard (Customers may use their own foundation model licenses to utilize AI.)

- **Large language models supported:** Azure OpenAI, OpenAI, Aleph Alpha, IBM watsonx, Amazon Bedrock, Google Vertex AI, and Google Gemini AI Studio; support for customer bring your own LLM

Strengths

- **Integrations and composability out of the box:.** ServiceNow delivers out-of-the-box AI-powered, digital workflows to help customers realize rapid ROI, faster go-lives, and reduced complexity among applications. An increasing number of field service organizations deal with fragmented technology stacks as more of the IT infrastructure is being modernized from legacy, outdated systems. ServiceNow has also ensured that its core product offerings are industry enabled, further highlighting the need for solutions to meet the specific requirements of a given market or industry vertical.
- **Closed-loop service operations and innovation:** ServiceNow offers a unique combination of capabilities to support the call center, asset management, dispatch, and debrief for field service operations. ServiceNow accelerates the execution of work and also closes the loop in service operations, which can unearth the quick identification of process problems and expedite fixes through automated root cause analysis. Broken processes negatively impact customer experience and revenue. ServiceNow helps customers take corrective and preventive actions through intelligent insights, which can lead to escalations, knowledge creation, product recalls, and field change orders.

Challenges

- **Incumbency bias:** The primary challenge facing ServiceNow is IT teams that are reluctant to change their incumbent vendor relationships. Field service is a relatively immature technology space in comparison with functions like supply chain and finance, which have been modernizing for decades. For this reason, field service transformations often occur after technology investments are made across the organization. To address this incumbency challenge, ServiceNow must continue to adopt an open approach toward technology integrations and ecosystem partnerships.

Consider ServiceNow When

Field service and aftermarket service firms should consider ServiceNow when they are looking for a technology partner invested in continuous innovation, including the application of AI to optimize service operations and expand capabilities to suit industry needs. ServiceNow has delivered rapid advancements in field service management and maintains a culture of organic growth buoyed by strategic acquisitions to enhance its offerings. The company is committed to establishing partnerships with its customers, nurturing a mutually beneficial community of best practice and innovative ideas sharing aligned with real-world needs.

ServicePower

ServicePower is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide AI-enabled field service management applications.

ServicePower is a global technology vendor headquartered in McLean, Virginia, United States, providing support for the field service market for over 25 years. ServicePower has an end-to-end field service management application that automates and optimizes field service workflows. The company primarily supports FSM clients in North America and Europe. ServicePower has strategic partnerships with Cognizant, DRK Resources Tech, and Field Service in Motion.

ServicePower's FSM offering is made up of the following modules: scheduling, mobile access, dispatch, contractor reimbursement, contractor management, customer self-service, work order management, and analytics. ServicePower is able to partially support artificial intelligence, machine learning, and agentic AI capabilities currently with additional embedded AI functionality on its road map. ServicePower is also able to deliver key functionality in dynamic route optimization, warranty/entitlements management, service contract management, and parts, material, and returns management. ServicePower also have additional capabilities in Vision AI, compliance, and background checking as a result of the recent acquisitions of Inveniam and PlusOne Solutions.

Quick facts about ServicePower include the following:

- **Employees:** 170 (145 aftermarket-focused employees)
- **Globalization:** Offering used in 27 countries, offered in 10 languages
- **Industry focus:** Manufacturing (discrete and process), energy and utilities, retail, services, insurance, consumer goods, and other
- **Total number of partners:** <20
- **Deployment and delivery model:** Hosted — public cloud
- **AI enablement:** Partially supports customers to use their own foundation model licenses to utilize AI

Strengths

- **Vision AI innovation:** ServicePower recognized the rapid innovations that are required within the field service market where organizations are being disrupted at a rapid pace. ServicePower acquired Inveniam, which now provides the company with AI computer vision capabilities. This offering differentiates ServicePower, as often field service offerings are primarily focused on the schedule or work order and not the adjacent unstructured data sets enabled by computer vision. The acquisition of Inveniam accelerates these capability

integrations and enhances the end-to-end FSM experience that ServicePower can offer to its current and future customers.

- **Ability to optimize for the blended field service workforce:** ServicePower leverages an AI-powered schedule optimization system that is able to optimize for intraday changes to needs of diverse field forces. With 25+ years of schedule optimization domain knowledge, ServicePower's offering is robust and intelligent with the ability to automate contractor dispatching and reimbursement. The ability to automate contractor reimbursements improves engagement with this set of resources that are becoming more critical to the operations. The application is built to manage internal employees and contractors, enabling customers to navigate a variety of customer, dealer, or partner preferences. The size and strength of the ServicePower Premier Network, now combined with the contractor intelligence on over 80,000 service companies and 220,000 technicians from the PlusOne Solutions acquisition, present a robust ecosystem.

Challenges

- **All-in-one enterprise offerings:** ServicePower's primary challenge comes from field service companies that are looking for a single provider to support the technology stack that extends beyond field service management. ServicePower is considered a niche vendor due to its focus on the field service market, which provides value in its specialized innovations. However, this focus is also a gap as the company is not able to support a broader range of IT needs. To mitigate this gap, ServicePower has established some strategic partnerships and also an open architecture, which allows for API, SDKs, and plug-ins for integrations with other enterprise systems.

Consider ServicePower When

Field service and aftermarket service firms should consider ServicePower when they are looking for a technology partner that can support employed, contracted, or a blended workforce, which is supported by a real-time optimization tool to manage the dynamic nature of a field service workday. More and more field service teams incorporate contractors, and these resources are having a bigger impact on the end customer experience. Engagement with these resources can't be overlooked. Field service organizations with a minimum of 50–100 field service technicians tasked with completing tens of thousands of work orders annually can be supported by ServicePower.

Solvares Group

Solvares Group is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide AI-enabled field service management applications.

Solvares Group is a technology provider headquartered in Germany enabling the field service management industry for over 30 years. Solvares' field service offerings were established with the acquisition and combination of FLS (FAST LEAN SMART) and Mobile X. Solvares is focused on real-time scheduling and mobile functionality for field service management with clients across a variety of industries primarily in Europe, with some customers also in North America and Asia/Pacific. Solvares has strategic partnerships with Microsoft and multiple Microsoft global and regional partners for Dynamics, IBM Maximo partners, SAP partners, MRI Software, and Zinier.

Solvares has established machine learning and AI capabilities embedded in the FSM offering and is developing these further. Key functionality for the FSM product includes mobile workforce management, mobile work order management, scheduling optimization, dynamic route optimization, business intelligence/analytics, dispatch management, capacity planning, machine learning, and crew/workers geolocation capabilities.

Quick facts about Solvares Group include the following:

- **Employees:** 350 (200 aftermarket field service)
- **Globalization:** Offering used in 30 countries, offered in 8 languages
- **Industry focus:** Facilities management and housing, manufacturing (discrete and process), energy and utilities, retail, healthcare, services, inspections, telecommunications, insurance, and other
- **Total number of partners:** <75
- **Deployment and deliver model:** SaaS — private or public cloud
- **AI enablement:** Machine learning (subset of AI techniques that enable computer systems to learn without programming by a human)
- **Large language models supported:** NA

Strengths

- **Real-time, continuous schedule optimization:** Solvares offers real-time schedule optimization throughout the day with in-depth rules and constraints that calculate best appointment choices and guide field service teams according to cost, efficiency, and customer outcome. The company also offers predictive traffic–based route optimization, insights, and live ETA routing based on actual GPS-fed traffic and speed data. The dynamic nature of Solvares' field service offering enables high flexibility in planning that can adapt to changes in resource capacity, customer availability, or organizational priorities.
- **Partnerships and complimentary offerings with the aftermarket technology ecosystem:** Solvares recognizes its value and is keen to partner when it is in the best interest of its customers and prospects. The company has established deep partnerships with a wide variety of technology vendors to support customers at a variety of stages of digital maturity.

Challenges

- **Broad enterprise offering:** Solvares' primary challenge is the fact that the company's offering is focused on scheduling optimization best suited to integrate with an ERP, a CRM, a contact center, or an enterprise asset management application. Field service organizations that prefer a single solution to meet their broad digital transformation and modernization needs will have unmet needs with just Solvares. However, the company is keen to establish partnerships and shared go-to-market strategies to avoid getting into deal cycles that are misaligned.

Consider Solvares Group When

Field service and aftermarket service firms should consider Solvares when they are looking for a technology partner that establishes a holistic approach to real-time scheduling and technical field service. Solvares has over 30 years of experience in field service scheduling optimization and has established a scalable offering to handle complex scheduling requirements providing efficiency. The company is focused in solving the challenges scheduling for large field service workforces. Solvares helps its customers achieve benefits in critical KPI such as costs savings, travel time, capacity, SLA adherence, and first-time fix, among other metrics.

Syncron

Syncron is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide AI-enabled field service management applications.

Syncron is a global aftermarket service technology provider headquartered in Stockholm, Sweden, which has served the aftermarket for 35 years. Syncron's SaaS field service management capabilities optimizes field service delivery for manufacturers and service organizations, with the goal of improving overall service efficiency, service technician utilization, productivity, and maximizing revenue streams. Syncron primarily supports customers in North America and Europe, with some clients in Asia/Pacific. The company has a strategic partnership relationship with 4flow, 7Sages, Accenture, Amazon Web Services, ARK, Boston Consulting Group, Bristlecone, Capgemini, CPQ Finland, Cognizant, CONET ISB, Converteo, Ducker Carlisle, Dunn Harland, Genpact, NexZ Pty Ltd., Noventum, SnapLogic, Star Cooperation, TopMonks, and Valcon.

Syncron provides end-to-end field service management capabilities with embedded AI functionality. Key functionality includes mobile work order management; warranty/entitlements management; installed base management; customer portal; business intelligence; artificial intelligence; parts, material, and returns management; crew/worker geolocation; and service collaboration capabilities. Syncron is also able to support inspection, knowledge recommendations, generative AI tech assist for field technicians, and integrated work order-claim-return workflow capabilities.

Quick facts about Syncron include the following:

- **Employees:** 765
- **Globalization:** Offering used in >100 countries, offered in 8 languages
- **Industry focus:** Agriculture equipment, automotive, construction and mining, industrial equipment, manufacturing (discrete and process), retail, services, insurance, and consumer goods
- **Total number of partners:** <50
- **Deployment and deliver model:** Hosted — private cloud, hosted — public cloud
- **AI enablement:** Generative AI technician assist
- **Large language models supported:** Claude

Strengths

- **Profitability engine from the aftermarket:** Syncron has established a robust platform that can identify revenue leakage within an aftermarket business and help these organizations execute on the opportunity to drive innovations and new revenue streams. Syncron often works with customers that operate in dealer networks or complex aftermarket environments where downtime is measured in millions of lost dollars. Syncron has been able to help its customers transform by improving service parts availability to the benefit of increased profitability and repeatable, predictable revenue streams.
- **Orchestration of data and insights:** Syncron is focused on the link between service, inventory, and price of parts and service contracts. Often in the aftermarket organizations are forced to manage disparate functions and siloed data that constrict innovation. Syncron is able to leverage aftermarket intelligence and insights to drive not just the delivery of quick wins but also big opportunities to innovate in markets that are often being disrupted. Syncron enables a 360-degree view of the aftermarket service operations that drives innovation and value creation.

Challenges

- **Cost-centric and volume scheduling field service operational models:** The primary challenge facing Syncron comes from attempting to partner with organizations that are focused on cost containment or that operate in a model that is high volume but not complex work. Industries that prioritize scheduling more jobs in a given day with automation around simple tasks will not gain the full value of Syncron's orchestrated approach to assets and parts knowledge, which can drive unearth revenue opportunities from the aftermarket. The challenge for Syncron is that there are still a number of organizations that for the

foreseeable future will be cost focused, which will constrain Syncron's growth potential as these organizations will not be a good fit.

Consider Syncron When

Field service and aftermarket service firms should consider Syncron when they are looking for a partner that recognizes the field service operation requires orchestration across a number of processes and data sets within the operation. Excellence is achieved not just by having the best schedule or efficient route. Syncron helps its customers connect disparate functions, execute on repeatable revenue opportunities, and increase loyalty beyond the life of the asset.

Tavant

Tavant is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide AI-enabled field service management applications.

Tavant is a global technology provider headquartered in Santa Clara, California, United States. Tavant has supported the aftermarket and field service for over 25 years. Tavant's mission is to enable, improve, and transform relationships among customers, OEMs, suppliers, channel partners, and machines. Tavant not only supports customers globally primarily in North America but also has clients in Europe, Asia/Pacific, and Latin America. Tavant has strategic partnerships with Salesforce, Microsoft, MuleSoft, ServiceNow, S-Docs, Adobe, Kentico, Amazon Web Services, WNS, enosix, Vigience, Zenkraft, Shipmates, Tecnos Corp., and Abilex.

Tavant offers an AI-enabled field service management end-to-end product along with a core broader service life-cycle management suite. Key functionality includes mobile workforce management; mobile work order management; scheduling optimization; dynamic route optimization; warranty/entitlements management; service contract management; installed base management; HCM; contractor management; customer portal; business intelligence; dispatch management; service demand forecasting; capacity planning; artificial intelligence; machine learning; deep learning; generative AI; parts, material, and returns management; crew/worker geolocation; service collaboration; remote monitoring/triage; service CPQ; and gamification capabilities.

Quick facts about Tavant include the following:

- **Employees:** 3,000+ (550+ aftermarket and field service focused)
- **Globalization:** Offering used in 186 countries, offered in 21+ languages
- **Industry focus:** Aerospace and defense, agriculture/farm equipment, automotive, commercial bus and truck, industrial equipment, building/construction, electrical appliances, HVAC, manufacturing (discrete and process), healthcare, services, and consumer goods

- **Total number of partners:** 20+
- **Deployment and delivery model:** On premises, hosted — private cloud, hosted — public cloud
- **AI enablement:** Warranty.AI, Quality.AI, Field.AI, Price.AI, Contract.AI, Connect.AI, and Knowledge.AI (Customers may use their own foundation model licenses to utilize AI.)
- **Large language models supported:** Support for customer to bring your own LLM

Strengths

- **AI-driven automation and knowledge delivery:** Tavant's agentic AI engine is embedded across the service life cycle, enabling optimized scheduling, triage, and dispatch. Tavant Field.AI is an AI-powered field service solution and a core part of Tavant's broader service life-cycle management suite, helping aftermarket service organizations digitally transform. Tavant's field service management capabilities combine proactive, context-aware knowledge delivery, driving higher technician efficiency and improved first-time fix rates. Tavant is constantly rolling out a consistent set of embedded AI capabilities within its technology, which are focused on not just exploring the potential of AI but also delivering business value.
- **Strategic cloud partnerships and ecosystem:** Tavant has been a long-standing partner within the Salesforce ecosystem and has also established a number of other strategic partnerships to support its entrance into the FSM market. Tavant Manufacturing Analytics Platform (TMAP) is listed on Microsoft Azure and AWS Marketplaces giving customers the benefit from deployment flexibility and native integration within their enterprise cloud environments. This approach leverages existing investments clients have already made enabling a quicker deployment.

Challenges

- **Navigating complex IT landscapes and dealer networks:** One of the primary challenges facing Tavant lies in deploying its field service offering across diverse IT environments, ranging from modern cloud platforms to legacy CRM and ERP systems. This challenge is particularly acute with OEMs that are often riddled with technical debt that can make change and digital modernization cost prohibitive. Also, as Tavant is focused on industrial markets with its field service offering, which often operate with a dealer/distributor networks, the company needs to navigate independent technology preferences requiring tailored strategies and closer stakeholder alignment.

Consider Tavant When

Field service and aftermarket service firms should consider Tavant when they are looking for a technology partner that is attentive and can have a close relationship of shared innovation and technological advancements. Tavant has embraced AI and has invested heavily in AI, generative AI, and agentic AI capabilities, with a focus on use cases specific to the aftermarket. Tavant looks to help its clients migrate from incumbent technology offerings or manual processes to explore AI innovations and digital modernization.

Zinier

Zinier is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide AI-enabled field service management applications.

Zinier is a field service technology software provider headquartered in San Mateo, California, United States. Zinier is an AI-native workflow-driven customizable software platform enabling the management of workforces, assets, and customers in the field. The company offers end-to-end field service management capabilities and has served this market for eight years. The company has customers globally in North America, Europe, Asia/Pacific, Latin America, Africa, and the rest of the world. Zinier has strategic partnerships with Hexagon, Siemens, Accenture, CGI, Cyient, Inetum, NetCracker, NTT Data, among others.

Zinier offers field service capabilities that have embedded AI functionality at every level. Key functionality includes mobile workforce management; mobile work order management; scheduling optimization; dynamic route optimization; warranty/entitlements management; service contract management; installed base management; service fleet management; contractor management; customer portal; business intelligence; dispatch management; service demand forecasting; capacity planning; artificial intelligence; machine learning; generative AI; agentic AI; parts, material, and returns management; crew/workers geolocation; service collaboration; and remote monitoring/triage capabilities. Zinier also supports capacity management, parts and inventory, tools management, asset management, and maintenance management systems.

Quick facts about Zinier include the following:

- **Employees:** 200
- **Globalization:** Offering used in 17 countries, offered in 8 languages
- **Industry focus:** Telecom, energy and utilities, oil and gas, renewables, industrials, manufacturing, and services, among other industries. (Configurable platform and prebuilt modules enable support for all industries.)

- **Total number of partners:** <50
- **Deployment and delivery model:** Hosted — public cloud or hosted — private cloud
- **AI enablement:** AI-native, event-driven workflows that allow AI to be enabled at any level (Z-Sidekick AI agents can be deployed for any persona.)
- **Large language models supported:** Has built-in support for popular models and also integrates with any AI provider — from OpenAI to customer's proprietary models — giving flexibility and control over AI strategy without vendor lock-in (Customers may use their own foundation model licenses to utilize AI.)

Strengths

- **FSM-first flexible platform:** Zinier's FSM offering is extensible, configurable, and customizable for the specific business needs of field service, which enables organizations to adapt to the changing needs of their operations. The platform is cloud native, event driven, and workflow based, allowing FSM companies the ability to innovate and avoid the rigidity of inflexible offerings that can't evolve as business needs change. Zinier is also able to partner with its customers to ensure evolution can happen as the technology market shifts, not being weighed down by legacy IT infrastructure, which can at times anchor a company in place.
- **Built for AI and automation for service delivery and execution:** The goal of Zinier is to achieve the business goals of its customers and allow for a touchless experience with autonomous workflows, which can enable management by exception. Zinier looks to aid its clients in a fast time to value, which is imperative in this current era of AI innovation and digital model transformation.

Challenges

- **Legacy enterprise platform incumbents:** The primary challenge facing Zinier is breaking into organizations that have an enterprise solution incumbent. Zinier is focused on the field service market and there are service organizations that are looking for a broad enterprise partner that can support the needs of the back office, middle office, and front office. Vendors like Zinier struggle to break through in these environments as Zinier delivers an integrated and focused FSM offering as a part of a technology stack as compared with a single-vendor solution.

Consider Zinier When

Field service and aftermarket service firms should consider Zinier when they are looking for an enterprise field service platform that delivers value quickly while maintaining the flexibility to adapt as the business evolves. Field service teams need

intelligent support for complex asset installation and maintenance tasks, while the back office requires automated scheduling and resource optimization. Organizations managing critical infrastructure and essential services need technology solutions that combine prebuilt field service modules with unlimited configurability. Zinier also helps its clients build their own AI agents with an AI Agent Builder, enabling businesses to train and deploy AI agents for a variety of use cases across domains through a no-code interface.

Zuper

Zuper is positioned in the Major Players category in this 2025 IDC MarketScape for worldwide AI-enabled field service management applications.

Zuper is a field service technology software provider headquartered in Seattle, Washington, United States. The company has provided offerings for the end-to-end field service management market for over six years. The company primarily supports field service customers in North America but also has clients in EMEA, Asia, South America, and Oceania. Zuper has strategic partnerships with Nagarro, Premium Plus, RevOdyssey, RevPartners, Three Ventures, and Unlimited Technology Solutions.

Zuper offers field service capabilities that have embedded AI functionality. Key functionality includes mobile workforce management; mobile work order management; scheduling optimization; dynamic route optimization; service contract management; installed base management; service fleet management; customer portal; dispatch management; parts, material, and returns management; crew geolocation; and service collaboration capabilities.

Quick facts about Zuper include the following:

- **Employees:** 200
- **Globalization:** Offering in use in 36 countries, with support for 11 languages
- **Industry focus:** Manufacturing, energy and utilities, retail, healthcare, services, telecommunications, insurance, and consumer goods, among others
- **Total number of partners:** <250
- **Deployment and delivery model:** Hosted — public cloud
- **AI enablement:** AI-assisted dispatching, workflow builder, expense scanner, job summary, AI responder, voice notes, call summary, job walkthrough
- **Large language models supported:** OpenAI GPT-4

Strengths

- **Robust AI road map:** Zuper has invested in embedded AI capabilities establishing features with the offering such as job summary generation, smart scheduling, and report automation. Zuper has a weekly release schedule with major releases occurring monthly. Zuper's built-in AI tools enable teams to capture job updates and notes more efficiently with smart suggestions, automatically generate job summaries and service reports, and instantly respond to customer inquiries through AI-powered communication tools. The company has a culture of continuous innovation and dynamic product enhancements. Zuper also works closely with its customers to evolve its offerings to align with customer needs.
- **Configurability and integrations:** Zuper's FSM offering is flexible and configurable with open APIs with over 60 integrations. The FSM offering provides unlimited custom workflows, fields, statuses, and reports. Zuper is able to enable customers to leverage drag-and-drop workflow and report builders. The company has joint sales motions with its ecosystem partners. The company also offers out-of-the-box integrations with partners. The company recognizes the complex nature of digital transformation and the necessary orchestration of partners to aid in the digital journey for field service organizations to achieve faster time to value, lower cost of ownership, and ease of use.

Challenges

- **Industry-specific customization requirements can take time:** Zuper's primary challenge is in quickly delivering offerings that are highly tuned to specific industry needs. Field service organizations share many similarities across industries, yet each vertical also has unique challenges. Zuper has a horizontal approach to the field service market with technology that's designed to be highly adaptable and configurable. While this can extend implementation timelines to ensure requirements are fully met, it ultimately provides a stronger long-term value for clients.

Consider Zuper When

Field service and aftermarket service firms should consider Zuper when they are looking for a technology partner that prioritizes the field technician's needs and experience. The field service industry is going through a rapid transformation where digital tools are at the forefront of change. Organizations need a partner that delivers a cohesive end-to-end experience across every role, powered by flexible, modern software that adapts to their business. Zuper innovates at the speed and scale required to deliver the right outcomes to the end customer.

APPENDIX

Reading an IDC MarketScape Graph

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

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

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

In lieu of market share, this IDC study measures vendor footprint within the specific market segment based on publicly available data or analyst analysis to represent the relevant bubble sizes in the chart.

Each of the 19 aftermarket and field service management vendors in this IDC MarketScape support the broad range of capabilities needed within the end-to-end field service management and issue resolution process. This study is also focused on the impact of AI-enabled applications, and each vendor in this study has deployed AI, generative AI, or agentic AI capabilities in support of the field service operation. All vendors in this study ended up in the Leaders or Major Players categories because of the ability to deliver across the variety of functional areas needed to execute field service and support within a variety AI-enabled use cases.

IDC MarketScape Methodology

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

Market Definition

This study assesses the capability and business strategy of many notable field service management (FSM) and aftermarket and service life-cycle management technology vendors.

Please keep in mind the following definitions:

- **Field service management:** The set of activities or processes to manage the field service operation, including work order management, scheduling optimization, route optimization, fleet management, human capital management, contractor management, augmented/mixed reality, among other capabilities
- **Aftermarket service/service life-cycle management:** The process of servicing a product or an asset through its lifetime (This includes customer support, service request, service planning, service execution and field service, spare parts management, warranty management, and recalls.)
- **Artificial intelligence:** Techniques that help computers mimic human behavior
- **Machine learning:** Subset of artificial intelligence techniques that enable computer systems to learn without programming by humans
- **Deep learning:** Subset of machine learning techniques that makes the computational multilayer neural networks feasible
- **Generative AI:** Subset of deep learning techniques that enable computers to create new content using previously created content, such as text, audio, video, images, and code
- **AI agents:.** LLM-powered autonomous software entities that perceive their environment, make decisions, act upon them, and interact with users or other systems in a manner like a human

Strategies and Capabilities Criteria

Tables 1 and 2 provide key strategy and capability measures, respectively, for the success of selecting an FSM application.

TABLE 1

Key Strategy Measures for Success: Worldwide AI-Enabled Field Service Management Applications

Strategies Criteria	Definition	Weight (%)
Functionality or offering strategy	The vendor has a number of R&D employees (or full-time equivalents) dedicated to FSM-related applications.	2.0
Delivery	The vendor has a number of current partners.	45.0
	The vendor has an expected growth percentage of new partners.	
	The vendor has delivery centers in North America.	
	The vendor has a number of delivery centers in North America.	
	The vendor has delivery centers in Western Europe	
	The vendor has a number of delivery centers in Western Europe.	
	The vendor has delivery centers in Central and Eastern Europe.	
	The vendor has a number of delivery centers in Central and Eastern Europe.	
	The vendor has delivery centers in Asia/Pacific.	
	The vendor has a number of delivery centers in Asia/Pacific.	
	The vendor has delivery centers in Middle East and Africa (MEA).	
	The vendor has a number of delivery centers in Middle East and Africa.	
	The vendor has delivery centers in South America	
	The vendor has a number of delivery centers in South America.	
	The vendor has delivery centers in China.	
	The vendor has a number of delivery centers in China.	
	The vendor has delivery centers in Japan.	
	The vendor has a number of delivery centers in Japan.	
	The vendor has delivery centers in Australia and New Zealand.	
	The vendor has a number of delivery centers in Australia and New Zealand.	
	The vendor has a number of partners in North America for the FSM product.	
	The vendor has a number of partners in Western Europe for the FSM product.	
	The vendor has a number of partners in Central and Eastern Europe for the FSM product.	

TABLE 1

Key Strategy Measures for Success: Worldwide AI-Enabled Field Service Management Applications

Strategies Criteria	Definition	Weight (%)
	The vendor has a number of partners in Asia/Pacific (APAC, excluding China, Japan, Australia, and New Zealand) for the FSM product.	
	The vendor has a number of partners in Middle East and Africa for the FSM product.	
	The vendor has a number of partners in South America for the FSM product.	
	The vendor has a number of partners in China for the FSM product.	
	The vendor has a number of partners in Japan for the FSM product.	
	The vendor has a number of partners in Australia and New Zealand for the FSM product.	
	The vendor has a number of service/consulting/implementation partners.	
	The vendor has a number of systems integrators (SIs) with a formal agreement.	
	The vendor has a number of managed service partners with a formal agreement.	
	The vendor has a number of application partners with a formal agreement.	
	The vendor has a number of (public) cloud partners with a formal agreement.	
	The vendor has a number of sales/channel partners with a formal agreement.	
	The vendor has a number of agency partners with a formal agreement.	
	The vendor has a number of reselling partners with a formal agreement.	
	The vendor has a number of white labelling partners with a formal agreement	
	The vendor offers partners a marketplace for curated partner content and plug-ins.	
	The vendor offers professional implementation or expert services to support customer's implementation project.	
	The vendor has typical duration of an implementation of the FSM offering.	
	The vendor has direct industry-specific consultants for the FSM product.	

TABLE 1

Key Strategy Measures for Success: Worldwide AI-Enabled Field Service Management Applications

Strategies Criteria	Definition	Weight (%)
Environmental, social, and governance (ESG) strategy	The vendor has a process to regularly evaluate relevant ESG issues and those issues are incorporated into the organization's strategic planning process.	1.0
Financial/funding	This includes the company's revenue from the last fiscal year.	8.0
	This includes the company's revenue from the fiscal year before last year.	
	This includes the company's revenue from the fiscal year two years ago.	
	The number of years the company has been profitable in the past five years (based on GAAP or IFRS).	
	It includes total revenue for the FSM product in the last fiscal year.	
	It includes total revenue for the FSM product in the fiscal year before last year.	
	It includes total revenue for the FSM product in the fiscal year of two years ago.	
Growth	The company has a sales organization presence in Western Europe.	24.0
	The company has a sales organization presence in Central and Eastern Europe.	
	The company has a sales organization presence in Asia/Pacific (APAC excluding China, Japan, Australia, and New Zealand).	
	The company has a sales organization presence in the Middle East and Africa.	
	The company has a sales organization presence in South America.	
	The company has a sales organization presence in China.	
	The company has a sales organization presence in Japan.	
	The company has a sales organization presence in Australia and New Zealand.	
	The company has expected change in revenue growth from sales/channel partners over the coming 12 months.	
	There is expected change in revenue growth from service/consulting/implementation partners over the coming 12 months.	
	There is expected change in revenue growth from systems integration partners over the coming 12 months.	

TABLE 1

Key Strategy Measures for Success: Worldwide AI-Enabled Field Service Management Applications

Strategies Criteria	Definition	Weight (%)
	There is expected change in revenue growth from public cloud partners over the coming 12 months.	
	There is expected change in revenue growth from application partners over the coming 12 months.	
	There is expected change in revenue growth from reselling partners over the coming 12 months	
	There is expected change in revenue growth from white labelling partners over the coming 12 months	
	The vendor offers a partner certification program.	
	It refers to the percentage of vendor's partners certified.	
	The vendor's FSM product is a profitable product.	
	It includes the vendor's CAGR (compound annual growth rate) associated with the FSM product from the prior five years.	
	It refers to the vendor's FSM product anticipated growth percentage in the next one to two years.	
	It includes the vendor's FSM product anticipated growth percentage in the next three to five years.	
Innovation	The vendor uses road map priority assessment to prioritize road map items.	8.0
	The vendor uses customer feedback to prioritize road map items.	
	The vendor uses cost/benefit analysis to prioritize road map items.	
	The vendor uses competitive analysis to prioritize road map items.	
	The vendor uses customer process improvement to prioritize road map items.	
	The vendor uses research innovation to prioritize road map items.	
	The vendor provides access to innovation labs to work with the FSM offering and develop it.	
	The vendor's FSM client would say the vendor would lead its innovation strategy.	

TABLE 1

Key Strategy Measures for Success: Worldwide AI-Enabled Field Service Management Applications

Strategies Criteria	Definition	Weight (%)
R&D pace/ productivity	The company is aggressively investing in its FSM capabilities.	12.0
	The vendor actively supports/manages a partner community (training, products, and campaigns) for the FSM offering.	
	The vendor actively supports/manages a developer community/platform for sharing and discussing solution information (discord and code share) for the FSM offering.	
	The vendor actively supports/manages a private community/platform for sharing and discussing solution information (advisory council, member site, and wiki) for the FSM offering.	
	The vendor actively supports/manages a public community/platform for sharing and discussing solution information (knowledge base and forum) for the FSM offering.	
	The vendor currently makes R&D investments in generative AI to augment the vendor's software processes.	
	This is the organization's estimated percentage of revenue to be spent on R&D in the current fiscal year specific to the FSM product.	
	This is the company's percentage of revenue spend on R&D in the previous fiscal year specific to the FSM product.	
	The vendor plans a new release of the FSM product.	
Total		100.0

Source: IDC, 2025

TABLE 2

Key Capability Measures for Success: Worldwide AI-Enabled Field Service Management Applications

Capabilities Criteria	Definition	Weight (%)
Artificial intelligence	The vendors allow customers to use their own foundation model licenses to utilize AI.	17.0
	Customers use solution vendor's foundational models to utilize AI.	
	The solution supports a bring your own large language model for customers.	
	The vendor offers artificial intelligence capabilities and has customers that have adopted this offering.	
	The vendor offers machine learning capabilities and has customers that have adopted this offering.	
	The vendor offers deep learning capabilities and has customers that have adopted this offering.	
	The vendor offers generative artificial intelligence capabilities and has customers that have adopted this offering.	
	The vendor offers agentic AI capabilities and has customers that have adopted this offering.	
Customer satisfaction	Frequency of customer council meetings (in-person and virtual)	14.0
	The overall Net Promoter Score (NPS) for the past 12 months	
	The overall customer satisfaction score for the past 12 months	
	The overall customer retention rate (in percentage) for the past 12 months	
	Ability of the vendor to meet and exceed evolving customer/business needs	
	Ability of the vendor to manage the customer relationship and keep customers happy	
	Ability of the vendor's application to integrate with other enterprise systems/applications within the customer's technology stack	
	Ability of the vendor to offer expertise in aftermarket service	
	Ability of the vendor to offer expertise within a client's respective industry	
	Ability of the vendor to clearly convey to clients what is the near- and long-term product road map and company direction	

TABLE 2

Key Capability Measures for Success: Worldwide AI-Enabled Field Service Management Applications

Capabilities Criteria	Definition	Weight (%)
	Ability of the vendor to quickly incorporate new features and build into the product	
	Ability of the vendor to offer AI, machine learning, and generative AI innovations within the product	
	The vendor's overall value taking everything into account including the price the client is paying	
Customer service delivery	The vendor has functional support included in customer support and is available globally.	8.0
	The vendor has technical support included in customer support and is available globally.	
	The vendor has FSM engagements/customers in multiple regions.	
	The vendor has a global support footprint.	
	The vendor has domain expertise support outside of IT.	
	It includes the number of countries vendor's offering is currently being used in.	
	It includes the number of languages vendor's offering is supported.	
ESG	The organization has a formalized environmental, social, and governance program or set of policies and procedures.	8.0
	The vendor's formalized environmental, social, and governance program aligned to its enterprise risk management framework approved by executive management and the board of directors.	
	The vendor has key performance indicators (KPIs) to measure ESG progress.	
	The vendor's ESG performance has been rated by a rating agency (EcoVadis or similar).	
	The vendor's ESG performance is tied to bonus payout.	
	The vendor's ESG performance is tied to executive pay.	
	The vendor has conducted a baseline assessment of its carbon/greenhouse gas (GHG) footprint in alignment with the greenhouse gas protocol.	
	The vendor reports on or publicly discloses its carbon/greenhouse gas emissions.	

TABLE 2

Key Capability Measures for Success: Worldwide AI-Enabled Field Service Management Applications

Capabilities Criteria	Definition	Weight (%)
Functionality or offering	The application can be deployed globally and information can be accessed and normalized across regions.	25.0
	Application workflow can be configured.	
	The vendor offers mobile workforce management capabilities and has customers that have adopted this offering.	
	The vendor offers mobile work order management capabilities and has customers that have adopted this offering.	
	The vendor offers scheduling optimization capabilities and has customers that have adopted this offering.	
	The vendor offers dynamic route optimization capabilities and has customers that have adopted this offering.	
	The vendor offers warranty/entitlements management capabilities and has customers that have adopted this offering.	
	The vendor offers service contract management capabilities and has customers that have adopted this offering.	
	The vendor offers installed base management capabilities and has customers that have adopted this offering.	
	The vendor offers service fleet management capabilities and has customers that have adopted this offering.	
	The vendor offers HCM specific to FSM needs and has customers that have adopted this offering.	
	The vendor offers contractor management capabilities and has customers that have adopted this offering.	
	The vendor offers augmented/mixed reality application and has customers that have adopted this offering.	
	The vendor offers customer portal/applications and has customers that have adopted this offering.	
	The vendor offers business intelligence/analytics capabilities and has customers that have adopted this offering.	
	The vendor offers dispatch management capabilities and has customers that have adopted this offering.	
	The vendor offers service demand forecasting capabilities and has customers that have adopted this offering.	

TABLE 2

Key Capability Measures for Success: Worldwide AI-Enabled Field Service Management Applications

Capabilities Criteria	Definition	Weight (%)
	The vendor offers capacity planning capabilities and has customers that have adopted this offering.	
	The vendor offers parts, material, and returns capabilities and has customers that have adopted this offering.	
	The vendor offers crew/workers geo-location capabilities and has customers that have adopted this offering.	
	The vendor offers service collaboration capabilities and has customers that have adopted this offering.	
	The vendor offers wearable support capabilities and has customers that have adopted this offering.	
	The vendor offers remote monitoring/triage capabilities and has customers that have adopted this offering.	
	The vendor offers CPQ capabilities and has customers that have adopted this offering.	
	The vendor offers gamification/performance dashboard capabilities and has customers that have adopted this offering.	
Portfolio benefits	The line-of-business organization can apply business rules without involving IT.	25.0
	The vendor frequently educates customers and noncustomers on field service products/offerings.	
	The vendor has the typical customer ROI for the field service product.	
	The vendor shares relevant industry best practices with the client for a given industry.	
	The vendor shares best practices from other industries with the client.	
	The vendor offers digital transformation road mapping for clients.	
	The vendor offers digital maturity assessment for clients.	
	The vendor offers innovation path and/or new business model exploration and implementation.	
	The vendor has an industry-specific version of the FSM offering.	
	The vendor has active/production datacenter or cloud hosting presence for the solution in global regions.	
	The vendor offers a variety of customer training resources.	

TABLE 2

Key Capability Measures for Success: Worldwide AI-Enabled Field Service Management Applications

Capabilities Criteria	Definition	Weight (%)
	The solution supports and/or is in compliance with a variety of standards.	
	The FSM solution offers APIs, SDKs, or plug-ins to enable customization or integration with other tools in the development workflow.	
	The vendor offers built-in dashboards and reporting of application data.	
	The vendor offers built-in dashboards for operational reporting.	
	The vendor makes application database schema definitions available for customer-built dashboards and reporting.	
	The vendor provides data lineage and tracing for compliance reporting.	
	The vendor has FSM customers in a wide breadth of industries.	
	It refers to the number of new releases of the offering in the past three years.	
	The vendor provided ROI analysis and justification.	
	The vendor offers an evaluation version or trial period of the offering.	
Pricing model or structure of product/offering	The vendor offers a revenue-based pricing model.	3.0
	The vendor offers risk/profit sharing contract.	
	The vendor offers outcome-based pricing models.	
Total		100.0

Source: IDC, 2025

LEARN MORE

Related Research

- *IDC MaturityScape Benchmark: Aftermarket Services* (forthcoming)
- *Market Analysis Perspective: Worldwide Aftermarket Services Strategies Applications, 2025* (IDC #US52011225, forthcoming)

- *2025 Product Innovation and Aftermarket Services Global Survey — Key Findings* (IDC #US52848825, July 2025)
- *To Get Past AI Hype, What Barriers Does Your Aftermarket Organization Need to Mitigate?* (IDC #US53580325, June 2025)
- *IDC Market Glance: Aftermarket Services, 1Q25* (IDC #US53094025, March 2025)
- *IDC FutureScape: Worldwide Manufacturing Product and Service Innovation 2025 Predictions* (IDC #US51483123, October 2024)
- *IDC FutureScape: Worldwide Future of Customer Experience 2025 Predictions* (IDC #US51610124, October 2024)

Synopsis

This IDC study uses the IDC MarketScape model to provide an assessment of technology vendors participating in field service management. The study explores the impact of AI-enabled applications in the digital transformative journey of field service organizations.

"AI-enabled tools are revolutionizing field service management, transforming reactive operations into predictive excellence," says Aly Pinder, research vice president, Aftermarket Services Strategies, IDC. "As customer expectations soar, the integration of AI empowers service teams to deliver timely, efficient, and exceptional outcomes, redefining the face of brand customer interactions. The race to meet these demands is fraught with challenges, but AI offers the agility and insights needed to navigate complexity and drive innovation."

ABOUT IDC

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