IDC MarketScape

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

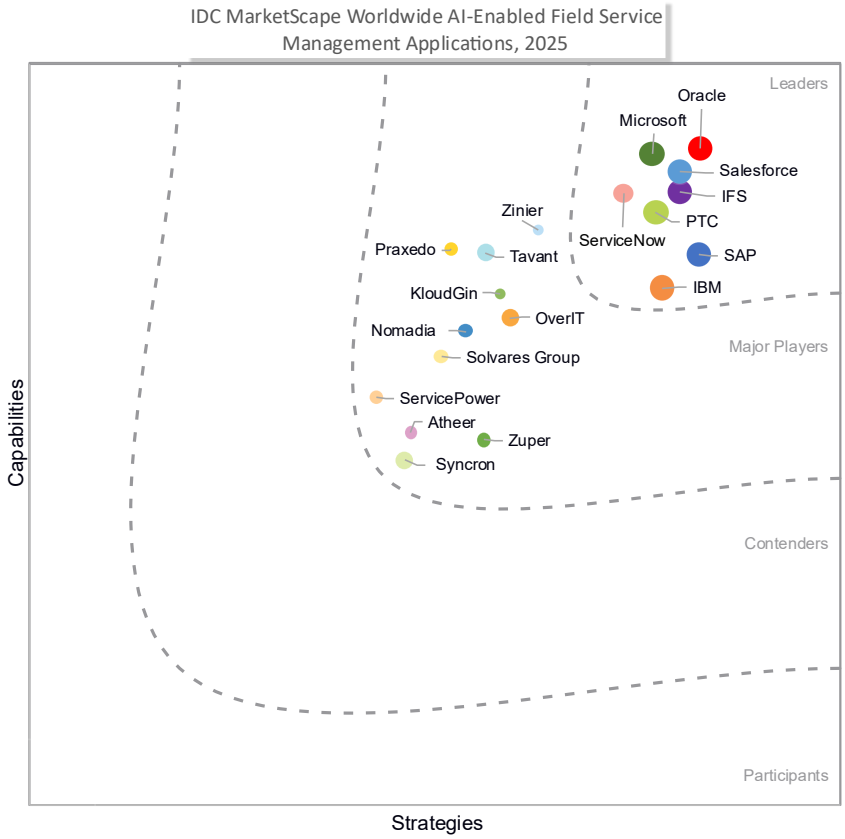
Aly Pinder

THIS EXCERPT FEATURES SAP AS A LEADER

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.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide AI-Enabled Field Service Management Applications 2025 Vendor Assessment (Doc # US52967825).

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 PROFILE

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.

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.

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

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

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

Global Headquarters

140 Kendrick Street
Building B
Needham, MA 02494
USA
508.872.8200
Twitter: @IDC
blogs.idc.com
www.idc.com