IDC MarketScape

IDC MarketScape: Worldwide AI-Enabled Aftermarket/Service Life-Cycle Management Platforms 2025 Vendor Assessment

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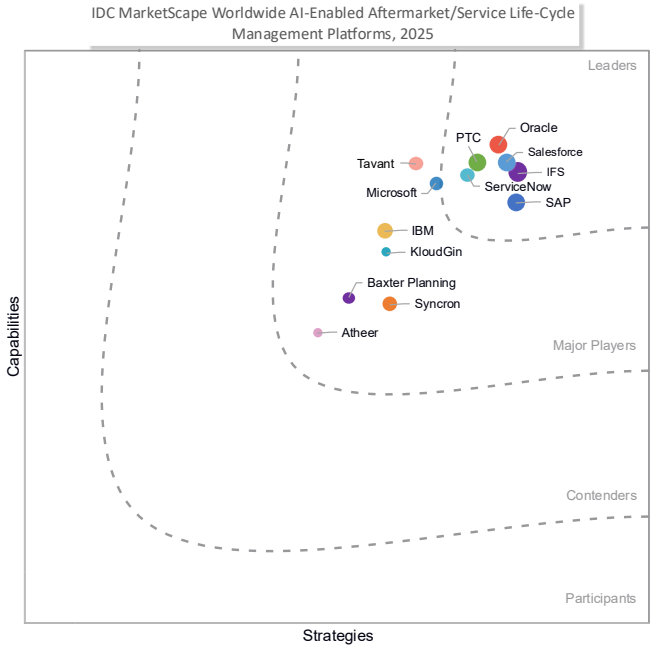
THIS EXCERPT FEATURES IFS AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide AI-Enabled Aftermarket/Service Life-Cycle Management Platforms Vendor Assessment



Source: IDC, 2025

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

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ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide AI-Enabled Aftermarket/Service Life-Cycle Management Platforms 2025 Vendor Assessment (Doc # US52968025).

IDC OPINION

In a renaissance of excitement, the aftermarket is proactively embracing artificial intelligence (AI) and technology modernization to transform and differentiate. The aftermarket has often been an incremental business function, which prods along a digital transformation journey going from paper-based processes to mobile apps with many steps in between. This legacy is rapidly being turned on its head. According to IDC's *Product Innovation and Aftermarket Services Survey,* the top business initiatives driving strategy for service leaders in the next 12–24 months are to adopt AI and generative AI (GenAI) tools and improve service (quality and speed) to customers (45.6% and 43.8%, respectively). AI is revolutionizing aftermarket service operations by breaking down silos, enabling seamless data integration, and driving modernization. AI-enabled tools have the opportunity to transform the aftermarket service life cycle into a dynamic, future-ready ecosystem. This transformation fosters efficiency, enhances customer satisfaction, and positions organizations for sustained innovation in a dynamic market landscape.

Key findings include the following:

- AI, generative AI, and agentic AI are not just an interest of the consumer market or back office. The aftermarket service operation is witnessing excitement around the potential for AI to drive business process and excellence within customer and employee engagements. Furthermore, aftermarket service organizations are exploring innovations beyond the use cases of a few years ago, which were focused on summarization or basic task automation. The future of AI and agentic AI is dynamic and requires consistent evaluation and partnerships for sustained innovations.
- Silos persist in the aftermarket and the adjacent functions that should leverage service data in their respective decision-making. Too often, applications and business functions are walled off from one another leading to missed opportunities to innovate and excel. A number of technology vendors are delivering a wider range of offerings to support multiple business functions or establishing robust partner ecosystems to ensure data can flow seamlessly across teams, suppliers, and customers. The aftermarket is riddled with a fragmented landscape; however, technology vendors are beginning to revel in the coopetition framework that allows for focus on value and user experience.

- The aftermarket and service life cycle is a function of the enterprise that often manages assets or equipment, which are long-lived and critical to the business. These realities demand that the service team has the expertise to deliver at the point of service every time, regardless of tenure, skill set, or ability. This provides a perfect storm of challenges as the workforce is aging while aftermarket service organizations try to meet the demands of a complex environment. To meet the needs of the market, service organizations will need to address the knowledge management challenges facing the workers and equip them with the dynamic tools to capture knowledge, access insights, and accelerate action in a mobile way to meet the needs of the customer.
- This "short list" as provided by this IDC MarketScape highlights the dynamic future strategies and current capabilities displaying advancement by each of these AI-enabled technology vendors, which aid aftermarket service organizations in their pursuit of digital transformation and modernization.

For this IDC MarketScape, all 13 vendors either directly offer or enable through partners the end-to-end aftermarket/service life-cycle management (SLM) set of capabilities. The service life cycle is a complex set of processes that enable aftermarket organizations to effectively, or if done poorly ineffectively, install, manage, maintain, and support assets, equipment, or products. The broad set of functionality and processes needed to excel in the aftermarket demands organizations to take a strategic approach to digital modernization and business model transformation. This evolution has made it critical that aftermarket service organizations identify the role of automation, digital tools, and now artificial intelligence to ensure the business processes across the entire service life cycle can be tuned to deliver the right set of outcomes for customers, dealers, distributors, partners, and the service team.

This IDC MarketScape highlights the distinct capabilities and future strategies of each of the technology vendors that provide offerings to aftermarket service organizations or technology buyers enabling digital automation and AI-enabled business transformation.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The aftermarket/service life-cycle management market consists of a broad set of activities and processes that enable operations, customer outcomes, issue resolution, dealer and customer satisfaction, revenue streams, operational efficiency, and cost containment. For the purpose of this study, we have focused on those technology vendors that currently focus on aftermarket/service life-cycle management, namely the business processes that enable the installation, maintenance, service, support, and issue resolution of assets, equipment, machinery, products, or vehicles that we deem to be notable because of the following characteristics:

- Technology vendors must have a global support footprint, with engagements in at least two major geographic regions.
- Technology vendors must have customers in at least three vertical industry segments.
- Technology vendors must have served the aftermarket/service life-cycle management market for at least five years.
- Technology vendors must have capabilities or strategic partner relationships to support end-to-end service life-cycle management activities and processes.
- Technology vendors must have demonstrated investments or have already deployed AI-enabled capabilities and functionality in a generally available product to support the aftermarket service operations.
- Technology vendor has referenceable clients that are using a broad set of aftermarket/SLM functionality as previously defined.

Each of the 13 aftermarket/service life-cycle management vendors included in this study meets the aforementioned requirements. There are technology vendors that provide offerings or capabilities for a subset of the aftermarket service life-cycle operations or support adjacent processes that are notable but not included because they do not meet the "end to end" requirement. This may change in the future, and future publications of this study will have additional inclusions.

ADVICE FOR TECHNOLOGY BUYERS

No longer an afterthought, the aftermarket service operation is a critical function for many businesses. Service leaders are looked upon to drive new and recurring revenue streams, ensure service teams can deliver exceptional service experiences and outcomes to customers, and efficiently resolve issues within the context of sometimes restrictive cost constraints. The ability for aftermarket service organizations to leverage enhanced technology innovations ensures continuous innovation and evolution can occur. This is no more true than the current technological environment whereby AI-enabled applications for the aftermarket are accelerating innovations, actionable insights, and enhanced experiences for customers and service workers. AI, generative AI, and agentic AI are more than an interesting advancement; it is transforming the way service can operate.

For aftermarket service organizations aiming to modernize and digitally transform their service operations and aftermarket processes with the aid of AI-enabled technologies, IDC offers the following recommendations:

- **Don't recreate the wheel — sometimes good enough is just that.** In this AI everywhere world, many organizations currently find themselves navigating

delayed deployments, and poor technology decisions can be a death knell. Decades ago, enterprises prided themselves on their uniqueness causing their digital investments to require high levels of customization. The key word here is uniqueness, not differentiation. Aftermarket service organizations should revel in their differentiation, but this shouldn't come with it a need to highly customize technology, which in turn slows innovation. The technology vendor market has embraced configurability and industry templates that often can aid an organization along the digital journey. Service leaders need to recognize technology vendors often have a breadth of deployment knowledge and, in many cases, customizations will constrain their ability to deliver rapid innovation.

- **Don't invest in automation or AI just for the sake of the board.** AI, generative AI, and AI agents have entered the realm buzzwords. But this is more so a byproduct of excitement both from the consumer world and from the business world. But aftermarket service leaders need to remain practical and focus on the strategic impact of AI on achieving business goals and KPI. AI, GenAI, and agentic AI like any other past technology advancements will only be as impactful as the business processes that they augment and inform. If even the boardroom seemingly just wants to hear what is happening around AI, what they really care about are business results, and the service organization mustn't lose sight of that.
- **Focus on value, not just interesting or siloed use cases.** Customer expectations continue to rise. Whether in a business-to-business (B2B), business-to-customer (B2C), or business-to-business-to-consumer (B2B2C) model, the ability to meet the needs of the customer remains to be the key determinant of success. As aftermarket organizations explore and invest in technology associated with AI enablement and automation, getting enamored by siloed use cases becomes a short-sighted endeavor. Use cases are very tangible and highlight near-term opportunity. But individual and functional AI use cases continue the long lineage of disconnected technology initiatives that fail to enable enterprisewide transformation. Aftermarket leaders should prioritize investments, whether AI related or not, that optimize the service life-cycle operations and provide a positive impact on the enterprise. Success in AI should be measured on how well the service team can deliver value to the customer and the enterprise.
- **Track engagement and adoption.** Digital technology modernization is a journey. The journey should be led by the users of the technology and your customers, not the IT organization. Often service leaders and the C-suite measure time to value in relation to technology investments made. However, one crucial determinant of time to value is whether or not the frontline team is using the technology within their business process or simply working around it to

get work done. The service worker should be involved in technology decisions and clearly understand how automation, AI, and digital capabilities will provide value through augmentation of their work. Otherwise, the service team will be a roadblock to success, value, and digital transformation.

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.

IFS

IFS is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide AI-enabled aftermarket/service life-cycle management platforms vendor assessment.

IFS is a global aftermarket service management technology vendor headquartered in Linköping, Sweden. IFS' aftermarket 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 aftermarket service operations offerings 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 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 AI-enabled service life-cycle management end-to-end platform suite. Key functionality includes customer support/contact center/dispatch management, service request, service planning, field service work order management, spare parts planning, spares logistics, repairs and refurbishment, warranty management/entitlements management, service contract management, recalls management, augmented/mixed reality, customer portal, business intelligence/analytics, service-specific analytics, service demand forecasting, capacity planning, artificial intelligence, machine learning, deep learning, generative artificial intelligence, agentic AI, contractor/partner portal, install base management, service collaboration, Internet of Things, remote monitoring/triage, service fleet management, and service CPQ 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, telecommunications
- **Total number of partners:** >400
- **Deployment and delivery model:** On premises, hosted — private cloud, hosted — public cloud
- **AI enablement:** Industrial AI platform, IFS Nexus Black, activation and consumption, industrial agents, knowledge management, first-time fix recommendations, resource forecasting for service
- **Large language models supported:** Azure OpenAI Service

Strengths

- **Industrial AI innovations:** IFS has established embedded AI capabilities directly for industrial markets, which manage complex equipment. IFS looks to make adoption of AI tools seamless and not a series of pilot projects that requires heavy internal IT resources. In this early wave of AI excitement, industrial markets have somewhat lagged behind other industries in adoption. IFS works with its clients to enable AI functionality specific to the complex workflows of the aftermarket and field service achieving near-term value.
- **Industry expertise and focus:** IFS has a level of focus in its core industries and ensures these clients have the technological advancements to innovate at the right speed. Adoption is one of the most critical determinants for a successful technology or digital modernization investment. Too often, IT teams force technology down the organization with limited buy-in or relevance. IFS, due to its strict focus on six industries, ensures its aftermarket service life-cycle management offerings deliver the specific capabilities to meet the needs of its clients while also being IT friendly.

Challenges

- **Speed to market:** The primary challenge facing IFS is the speed with which the company can lead new innovations to the market. IFS has embraced AI and other innovative technologies specific to the industrial markets it serves. Despite the organic and inorganic investments IFS has recently made, the company must remain tempered as the industries it supports can be risk averse and don't often look for a first-mover advantage when it comes to technology. IFS is navigating this quandary and will need to continue to show a near-term road map of innovation even if its clients aren't ready right away to adopt.

Consider IFS When

Aftermarket service firms should consider IFS when they are looking for a strategic technology partner that is invested in delivering innovations for industrial markets in

support of driving efficiency, revenue, and operational outcomes. IFS has an aggressive M&A and organic growth strategy looking to rapidly innovate while remaining true to the industries it serves. This era of AI is challenging organizations to figure out which investments are interesting and which ones will deliver value. IFS works with its clients to solve its respective problems of today with an eye to 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 13 aftermarket/service life-cycle management vendors in this IDC MarketScape either deliver or have established a partner ecosystem to support the broad range of capabilities needed within the end-to-end service life cycle. Also, each vendor in this study has deployed AI, generative AI, or agentic AI capabilities in support of the aftermarket and service life cycle. 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 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 IDC study assesses the capability and business strategy of many notable aftermarket/service life-cycle management technology vendors.

Please keep in mind the following definitions:

- **Aftermarket service/service life-cycle management —** the process of servicing a product or 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
- **Agentic workflow —** an iterative, interactive approach to AI development, where the AI agent is empowered to engage in a more dynamic and self-reflective process (This contrasts with the traditional "non-agentic" approach, where AI models are simply prompted to generate outputs in a single pass.)
- **Servitization —** product as a service (This includes selling usage, uptime, and power by the hour.)

LEARN MORE

Related Research

- *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 methodology to evaluate the capabilities and strategies of aftermarket technology vendors for 2025. The study highlights the transformative role of AI, including generative and agentic AI, in modernizing aftermarket service operations.

"Generative AI, AI, and agentic AI are reshaping aftermarket service, breaking down silos, enabling seamless dataflow, and driving transformative efficiency and customer satisfaction across the service life cycle," says Aly Pinder, research vice president, Aftermarket Services Strategies, IDC. "The future of service innovation lies in AI-enabled ecosystems that redefine operational excellence and strategic outcomes."

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.).

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