

IDC MarketScape: Worldwide Field Service Management Solutions for Utilities 2023-2024 Vendor Assessment

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THIS IDC MARKETSCAPE EXCERPT FEATURES OVERIT

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Worldwide Field Service Management Solutions for Utilities, 2023-2024



Source: IDC, 2023

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

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Field Service Management Solutions for Utilities 2023-2024 Vendor Assessment (Doc # US50036223). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

This IDC MarketScape provides electric, gas, and water utilities with critical information in assessing field service management (FSM) solutions. Whether due to the need for a new implementation or for catching up with latest developments in this domain, utilities can use this study to get insights into FSM vendors as well as their capabilities and strategies.

After evaluating technology vendors' offerings for utilities companies in the FSM domain, IDC Energy Insights' key findings include:

- **A diverse vendor ecosystem serving different functional needs.** This assessment depicts a diverse FSM vendor ecosystem, spanning across enterprise application software providers and technology vendors, domain, and industry specialists. Offerings range from mature, well-integrated products developed through years of experience to relatively young solutions and niche products designed for asset-centric or utility-specific use cases.
 - Following a long season of acquisitions, the most established enterprise software vendors in the industry have now seamlessly integrated FSM as the last-mile capability of their portfolios, be it enterprise resource, customer experience, or asset life cycle centric. These vendors offer feature-rich solutions, fine-grained configurability, and impressive technology innovation road maps that help to reduce churn among some of the most demanding customers.
 - Specialist vendors have continued to increase the functional depth of their cloud-native or replatformed products while investing greatly in more open architectures, integration, and extensibility. Some have even increased their focus and specialization in this industry, while new ones have emerged and are rapidly expanding their footprint. A few, more regionalized domain players have successfully established functional or price strategies among small and midsize utilities, infrastructure operators, and contractors, and they are pursuing steady growth with an opportunistic market outlook for FSM expansion.
- **Artificial intelligence/machine learning (AI/ML) everywhere.** All vendors have placed AI/ML at the core of their products and offer dynamic resource scheduling and optimization engines and configurators, as well as scheduling automation options that match a utility's complex operating model. Beyond core functionality, intelligent automation has become pervasive in many FSM solutions, from demand forecasting and workload planning, to dispatch support, routing, parts and technical knowledge support, and even contractor management. The most progressive vendors are actively deploying large language models and exploring generative AI to assist service managers, dispatchers, and field technicians, from work order capture to scheduling suggestions, mobile work briefings, and onsite knowledge search.
- **Rapidly maturing technician augmentation.** Investments in the area of field technician enablement have greatly accelerated in the past couple of years. From just a few solutions available in our last assessment, most vendors now offer off-the-shelf remote worker assist and remote site visit via first-party or partner applications. Augmented, mixed, and virtual reality (AR, MR, and VR, respectively) capabilities have also matured significantly, and

most FSM products offer augmented experiences for real-time collaboration, asset visualization, guided work, reporting, and knowledge capture and search. A few vendors have also invested in supporting wearables other than head-mounted displays for crew safety and lone worker support use cases, or extended remote inspection capabilities to drones and robots.

- **Deepening utility-specific and asset-centric functionality.** Vendors in this assessment offer a growing lineup of utility-specific and asset-centric functionality and dedicated integrations (particularly specialist players) or dedicated preconfigurations. Utility-specific work spans short-, mid-, and long-cycle work, from meter and outage work to vegetation management, linear asset inspection, maintenance, and construction work. Vendors also offer utility-specific resource management capabilities and work modes, such as jobs coupling, crew and capacity management, shift and on-call duty management, contractor management, storm or black-sky modes, and offline-first mobile apps. A few vendors offer integration to utility-specific systems such as advanced distribution management systems (ADMS), customer information systems (CIS), meter data management (MDM), including through deep-linking integrations on mobile, while most will offer out-of-the-box integrations to the most popular enterprise asset management (EAM), customer relationship management (CRM), and enterprise resource planning (ERP) systems in the industry. This adds to increasingly sophisticated asset data integration, from out-of-the-box GIS and mobile GIS capabilities (now a standard feature of many products) to Internet-of-Things (IoT) platform support for real-time asset data integration and last-mile asset performance management (APM) applications, and even building information modeling (BIM) capabilities for advanced asset visualization.
- **Cloud FSM becomes the de facto standard.** For the first time, all vendors included in this assessment offer software-as-a-service (SaaS) delivery models for their FSM products, and less than half still offer on-premises versions. While some of the major vendors have had cloud-only strategies for some time now, those that have more recently replatformed their products are seeing healthy migration rates, as more utilities buy into the value of cloud FSM regardless of their revenue models. We estimate the large majority of the live implementations covered in this study are in the cloud.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

To be considered in this IDC Energy Insights study, firms must be working in the utilities industry at worldwide level. Vendors in this Worldwide Field Service Management Solutions for Utilities Vendor Assessment must meet the following minimum criteria:

- **Utility industry experience.** A minimum market share or revenues is not required. Nevertheless, the vendor has to strategically address the utilities industry's (electricity, gas, water) FSM needs and be an active and reputable international player.
- **Product availability.** The FSM product needs to be commercial off-the-shelf software.
- **Product suitability.** FSM products are not required to be uniquely designed for utilities but need to be capable of supporting industry-specific needs.
- **Geographic footprint.** The vendor must have at least two projects, live implementations, or are pursuing work with utilities in at least two of the following regions: Western Europe, Central and Eastern Europe, Middle East and Africa, Asia/Pacific, North America, and Latin America.

Some vendors did not meet the inclusion criteria and were excluded from this analysis.

ADVICE FOR TECHNOLOGY BUYERS

This IDC MarketScape is meant to support utilities in evaluating FSM solutions. It analyzes vendors addressing utility-specific needs and outlines the criteria by which they were evaluated. As they consider the options available in the market for either greenfield deployments or replacements, in addition to the general FSM domain advances outlined above, utilities should consider the following:

- **Leverage digital FSM to support business and resource evolution.** At least three big shifts are happening in the industry that make investment in modern FSM a priority for utilities:
 - The accelerating electrification and decentralization of energy systems, causing an explosion in the number of new assets that utilities will have to deploy, connect, and manage.
 - The evolution of utility business and operating models from asset- to customer-centric and from "fit and forget" to "as a service," demanding greater customer- and service-centricity.
 - The relative scarcity of resources that utilities will have access to in order to manage the first two shifts, as the pool of technical skills progressively shrinks and there is more competition over those skills.

Companies that have yet to invest in FSM technology should make it one of their absolute priorities, while those that have already purchased FSM solutions should consider adding functionalities that leverage the latest digital technology and innovation to shift to proactive service models and augment field worker capabilities.

- **Prioritize technical knowledge management.** Data and experience accumulated by field technicians and contractors often remain in silos, and only a small portion of it is utilized. Thus, process-specific knowledge remains with the operating team or even individual technicians. Utilities must build capabilities to capture and operationalize field data and technical knowledge to ensure it doesn't leave the company when technical resources retire and that it can be shared across the teams and operating companies, benefiting the broader organization.
- **Evaluate utility-specific domain expertise and capabilities.** The functional depth and feature richness of FSM solutions varies considerably between vendors. It is important that prospective buyers weigh their options between integrating highly specialized utility solutions in their IT landscape; leveraging FSM as part of an integrated asset-, enterprise-resource-, or customer-centric platform; or configure a more agnostic solution to meet their specific needs.
- **Consider adjacent offerings for ecosystem benefits.** FSM touches upon several operational and business systems and processes. Utilities should examine their asset and operational processes and associated technology portfolios to determine whether there is an ecosystem benefit to one provider or another. Integration within a single vendor ecosystem is generally simpler and easier to manage. That said, with confidence in integration capabilities, some utilities are willing to invest in best-of-breed FSM applications that can meet their specific needs.

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 opportunities.

OverIT

OverIT is positioned in the Leaders category in the 2023-2024 IDC MarketScape for Worldwide Utilities Field Service Management Solutions.

OverIT is a global software specialist headquartered in Italy, with almost 25 years of experience in FSM. In 2021, the company was spun off from local systems integrator Engineering Group and became an independent entity controlled by Bain Capital and NB Renaissance (part of Neuberger Berman). Operating through seven offices in Italy, the U.K., and the U.S., the company employs over 680 professionals, more than half of whom are dedicated to FSM for utilities.

OverIT's new Next-Gen FSM Platform is a specialized solution designed for full coverage of utilities' FSM processes across customer- and asset-facing workflows. It offers advanced features for integration with utilities' IT and OT landscapes, from EAM, APM, and GIS to CRM and billing, ERP, and HCM, in addition to smart grid systems, from supervisory control and data acquisition (SCADA) and ADMS to IoT infrastructure. This includes out-of-the box connectors and integration accelerators for established software companies in the industry, from SAP to Maximo, Esri, Smallworld, Oracle, and Siemens.

OverIT's Next-Gen FSM Platform key architectural principles are designed to provide flexibility and reduce implementation cost while making the solution easy to configure and seamlessly upgradable, and strongly oriented to feature extensibility by partners. The platform's infrastructure foundation and codebase provides clients with the option of procuring the software as SaaS; deploying in a private cloud environment on Azure, AWS, or a Kubernetes infrastructure; or installing on-premises. Based on OverIT's decades-long experience with implementing with midsize and large service organizations covering sometimes very complex technical FSM scenarios, Next-Gen FSM Platform places particular emphasis on linear asset operations, resource optimization, and mobile empowerment:

- Maintenance and service of highly complex and hierarchical assets such as linear utility assets and mission-critical processes, including through integrations with GIS, EAM, and APM systems. OverIT has also been pushing the envelope on real-time asset connectivity and information visualization via IoT and BIM integration.
- Resource and schedule optimization for managing high volumes of planned and unscheduled work orders with variable dispatchable resources and skills across staff technicians and contractors (and dynamic crews). Native GIS technology and a precision ML engine help customers accurately predict task duration as well as skill and material requirements based on parameters such as the type of work order, its location, the customer and asset types, and the technician dispatched. The scheduling engine can accommodate complex sets of technical constraints, SLAs, and local regulations (e.g., customer service, meter management, emergency response).
- Mobile empowerment, providing technicians with a feature-rich mobile app for end-to-end work order management, from safety checklists through data collection and debriefing, including AR-powered field collaboration, knowledge capture/dissemination, and wearables support.

Over the past decade, on the back of successful deployments across large Italian utilities, OverIT's solutions have been implemented outside the company's home market in Europe, the Middle East, as well as South and North America. Today, OverIT's solutions are live across 76 utilities and span 28 countries, with a well-balanced footprint across electricity, gas, and water operations.

OverIT goes to market globally with a growing partner ecosystem. This includes channel partners, comprising established technology service providers in the industry (e.g., Accenture, Atos, CGI, Cognizant, Deloitte, Infosys, PwC) and technology partners (e.g., Esri, RealWear, SAP, and

Siemens). OverIT has also recently initiated a formal utility customer co-innovation program featuring Enel, Hera, Italgas, and SDGE. Worth mentioning is the recent long-term strategic tie-up with Siemens Smart Infrastructure in which OverIT will become the preferred field service extension to the Siemens Grid Software portfolio through a dedicated connector to be released in 2023.

Strengths

- After almost 25 years in the business and over 150 implementations in the industry, OverIT is widely recognized as an expert in addressing utility needs in the FSM space. The vendor is growing its commitment to the industry and is praised for having a highly competent team.
- Customers consistently recognize the quality of OverIT's solution, the company's ability to productize innovation (including through its co-innovation program), and the quality of the relationship – both institutionally and from a support standpoint – across project and operations.

Challenges

- While the new product strategy is proving successful (60% of customers migrated or migrating to the new platform in just one year), by focusing on the core product and delegating services to partners, OverIT risks losing some of that personalized approach it has become known for.
- Having spent a lot of resources on the product's replatforming and on a very targeted geographic expansion strategy that is slowly bearing fruit, OverIT has grown less over the past two years than some of its direct competitors.

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 with 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.

This IDC study gives more weight to the capabilities criteria versus the strategies criteria using a 60:40 ratio. A higher weight to capabilities criteria – such as current functionalities, adjacent offering, delivery and pricing model, and crucially, customer satisfaction – offers readers a better view of how FSM products can deliver for their businesses, today.

The size of the individual vendor markers in the IDC MarketScape represent the vendor footprint in the market based on IDC Energy Insights' estimates of the worldwide utility client base and revenues of each vendor within the specific market segment being assessed.

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

In this IDC MarketScape, IDC Energy Insights evaluates field service management (FSM) solutions for utilities globally. The focus is on solutions that support utilities' personnel in their asset-related work, including metering installation and maintenance, inspections, short- and long-cycle maintenance work, and construction work. FSM is often also referred to as mobile workforce management or mobile field force management.

For the purpose of this study, IDC Energy Insights defines field service management software as the set of applications used by utilities to schedule, optimize, and dispatch work orders to the field force, providing them with all the information needed to safely perform the work and then report on execution.

LEARN MORE

Related Research

- *IDC FutureScape: Worldwide Utilities 2024 Predictions* (IDC #US50062023, October 2023)
- *IDC's Worldwide Digital Transformation Use Case Taxonomy, 2023: Electric, Gas, and Water Utilities* (IDC #US51219422, September 2023)
- *IDC Energy Insights: Energy as a Service – DX Use Cases and Horizons, September 2023* (IDC #US51219323, September 2023)
- *Cloud Deployment Trends in Utilities* (IDC #US51218823, September 2023)
- *Utilities Asset Operations Quarterly Update: April-June 2023* (IDC #US50062123, August 2023)
- *Turning Utilities' Purpose into Outcomes for People, Prosperity and the Planet: Highlights from the IDC European Utilities Xchange 2023* (IDC #US49141023, August 2023)
- *Future Challenges and Opportunities for Utilities Field Service Management* (IDC #EUR151010823, July 2023)
- *Enhancing Utility Operations Using Artificial Intelligence* (IDC #US50852123, June 2023)
- *Utilities Asset Operations Quarterly Update: January-March 2023* (IDC #US49142022, May 2023)
- *Utilities Economic and Tech Spending Outlook and IT Budget Expectations for 2023* (IDC #US46520121, April 2023)
- *IT-OT Convergence Survey: Implications for Utility Asset Operators – Part 2* (IDC #US50061623, March 2023)
- *IT-OT Convergence Survey: Implications for Utility Asset Operators – Part 1* (IDC #EUR150437523, March 2023)

Synopsis

This IDC MarketScape evaluates vendors in the field service management (FSM) space for the utilities industry through a qualitative and quantitative assessment of their capabilities and strategies. It aims to aid utilities in deciding on their current or future FSM implementations, as well as to assist vendors in deepening their understanding of the competitive landscape.

"Field service and mobile workforce management are areas of critical innovation for industries such as utilities that need to handle growing complexity and volumes in the field in the face of a creeping technical talent crunch," said Jean Francois Segalotto, associate research director, IDC Energy Insights. "Vendors in this space are leveraging technology innovation to support assisted and automated decision making, technician augmentation, and deeper utility- and asset-centric functionality, all wrapped up in cloud delivery."

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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