IDC MarketScape

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

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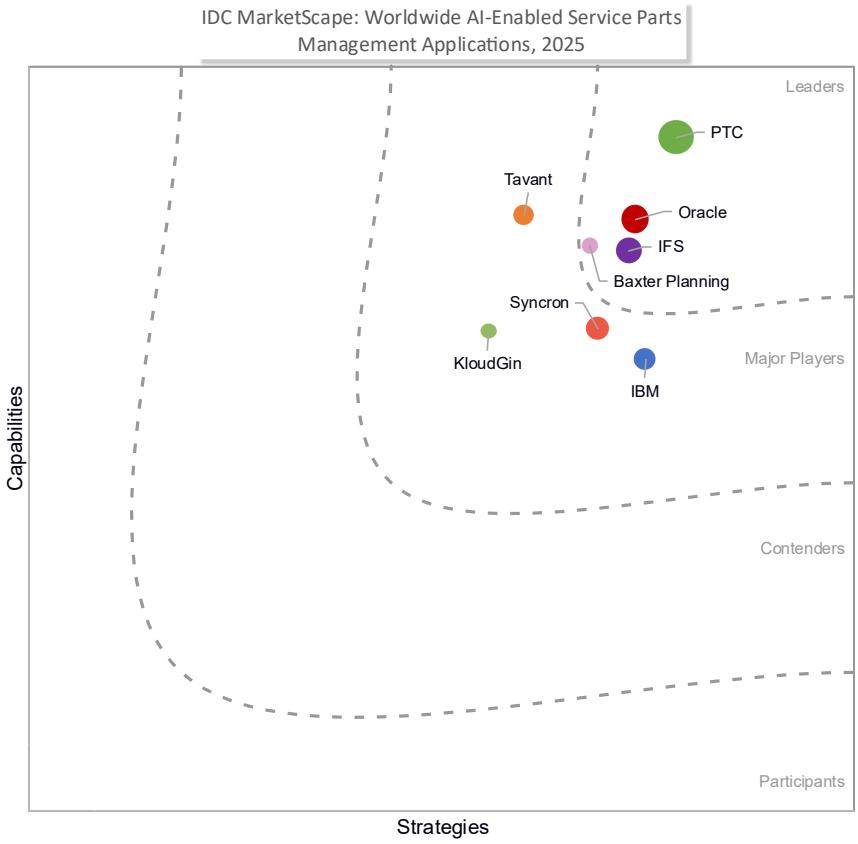
THIS EXCERPT FEATURES PTC AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

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



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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 Service Parts Management Applications 2025 Vendor Assessment (Doc # US52967925).

IDC OPINION

Delivering exceptional service outcomes to customers sets established aftermarket organizations apart from their peers. But exceptional support is getting harder and harder as service networks get more complex, as assets are more connected and difficult to diagnose issues, and as customers demand faster resolution. A recent IDC survey highlighted that one of the top business initiatives for aftermarket service leaders in the next 12–24 months was to improve service quality and speed to customers (as stated by 43.8% of respondents), only surpassed by the adoption of artificial intelligence (AI) and generative AI (GenAI) tools (source: IDC's *Product and Service Innovation Survey,* June 2025; n = 447). Meeting customers' expectations is both a challenge and an opportunity. Delivering on the service promise to ensure that outcomes are aligned and achieved gives the service organization the right to establish a long-term partnership with the customer, not just a transactional cost-focused relationship.

To meet these outcome needs, aftermarket service organizations need to ensure that their teams have the right skills, certifications, resources, availability, and service parts at the right time. Service parts management (SPM) is an aspect of the aftermarket service operation that has evolved for more than a decade, from a cost center often managed in the supply chain function to a critical factor in differentiation, revenue creation, and customer value proof point. Less than a quarter of aftermarket service organizations in IDC's 2025 *Product and Service Innovation Survey* characterized themselves as operating in a reactive, break/fix service model. This emergence of predictive, proactive, and prescriptive service modes demands that organizations have insights regarding issue diagnosis and what parts and people will be needed to solve that future issue. IDC believes that without a link between future issues and the service parts needed to solve that problem, customer expectations will not be met. However, just knowing what part is needed only solves a portion of the problem. Organizations need to have the ability to orchestrate the entire service supply chain operation to execute the delivery of the end-to-end service experience. AI-enabled technology and insights are accelerating the transformation of the aftermarket to ensure that organizations go beyond insights to deliver the right actions at scale.

Key findings include the following:

- The shift from reactive service models to predictive and prescriptive service models emphasizes the critical role of integrated, AI-powered platforms in driving customer value, operational efficiency, and long-term business growth in the aftermarket sector. Organizations need to have more advanced intelligence to dynamically address capacity needs and part availability across global networks. Coordination with multiple stakeholders and partners puts even more strain on the service organization.
- Successful adoption of AI in service parts management requires organizations to assess their data readiness, foster cross-functional collaboration, and ensure that technology investments are aligned with business goals to maximize value and avoid implementation challenges.
- As service networks grow more complex and as customer expectations rise, organizations must leverage advanced AI-driven solutions to optimize service quality, speed, and supply chain orchestration. AI-enabled applications provide the insights for the service parts organization to act faster in solving the evermore complex and dynamic issues.

This "short list," as provided by this IDC MarketScape, highlights the variety of future strategies and current capabilities in the service parts management space. Technology vendors prioritize these strategies and capabilities while enabling digital transformation, AI, business model modernization, and customer excellence.

All eight vendors of this IDC MarketScape support the end-to-end service parts management and service supply chain software market, with its varied set of processes. This IDC MarketScape explores the evolving needs of the service supply chain, specifically the impact of AI-enabled technologies on the service life cycle. The technology vendors in this study have, to varying degrees, invested in and deployed AI functionality in support of the service parts operation. AI and agentic AI capabilities are rapidly transforming the aftermarket, and this shift will continue to play a critical role in digital modernization and transformation.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This IDC study assesses the capabilities and business strategies of technology vendors in the AI-enabled service parts management applications market. For the purpose of this study, we have focused on vendors that have all of the following.:

- A service parts management offering that is currently commercially available or part of a suite of offerings

- Investment in or deployment of AI-enabled capabilities and functionality in a generally available product to support the service parts operations
- Customers in at least two industry segments and global support
- An offering in the service parts management market for at least five years
- Capabilities to support a broad range of service parts management activities and processes

ADVICE FOR TECHNOLOGY BUYERS

Digital transformation has a number of connotations within the aftermarket. Some organizations want to simply digitize forms or move processes from paper to a mobile device. In this current AI era, digital transformation — especially for the aftermarket — must take on a new definition. Aftermarket service leaders must demand from their technology partners and IT team the digital capabilities to address the complex needs of a complex service life cycle. AI-enabled technology can be more than an interesting advancement in applications to become the catalyst for new service business models, enhanced experiences, and the insights that finally allow for service outcomes to be predictive and prescriptive. For aftermarket and service parts management organizations that aim to improve service supply chain operation and service delivery, IDC recommends the following:

- **Assess AI readiness to avoid pilot fatigue.** Investing in AI-enabled technologies based on board nudging or market excitement can lead to failed projects. Not all organizations have the technological foundation to maximize the benefits of AI capabilities in their respective current state. Organizations need to ensure that their data is ready, the users are informed and willing to adapt, and the processes are in place to act on the insights at the speed of the information.
- **Build partnerships with technology partners that can aid in a digital transformation journey for the enterprise, not just a silo.** Stakeholders should select technology partners with proven expertise in aftermarket service operations, validated AI functionality, and a strong industry focus. Consider partners that offer comprehensive support for multi-echelon optimization (MEO), interoperability with existing enterprise systems (e.g., ERP, a warehouse management system [WMS], and CRM), and the ability to deliver measurable improvements in service quality, operational efficiency, and customer satisfaction.
- **Establish a consistent partnership with IT to ensure that technology advancements can be tuned for the aftermarket service operations.** The service supply chain relies on integration across business functions within the enterprise. To be actionable, insights need to be integrated with data sources from across the organization.

- **Ensure that service parts data can be accessed and leveraged across the service supply chain.** Dealers, distributors, and partners need visibility into the parts available across the network. Collaboration across the service supply chain ensures shared insights with the added benefit of recommendations that flow beyond a single silo.

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.

PTC

PTC is positioned in the Leaders category of this 2025 IDC MarketScape for worldwide AI-enabled service parts 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, PTC has provided service parts management and planning offerings in the aftermarket for more than 40 years. PTC delivers its service parts management capabilities under the Servigistics brand, enabling service parts optimization by using advanced data science to solve complex service supply chain challenges. The company has customers primarily in North America and Europe, with a presence in Asia/Pacific, Latin America, and the rest of world. PTC has key strategic partnerships specifically for the aftermarket and service parts management with Accenture/OnProcess, Amazon Web Services, Capgemini, Cognizant, Deloitte, Infosys, ITC Infotech, L&T Technology Services, Microsoft, Rusty Beetle, Tata Consultancy Services, Tech Mahindra, and Trax.

PTC has AI-embedded functionality in support of its service parts management offering. Key functionality includes parts demand planning, service demand forecasting, dynamic parts pricing optimization, parts returns, service parts repair/depot, parts recalls, parts tracking, refurbishment, dealer inventory management, end-of-life service parts management, network optimization, multi-echelon optimization, critical parts management, warranty management, defective parts management, predictive analytics and business intelligence, artificial intelligence, machine learning, deep learning, GenAI, agentic AI, connected products and IoT, proactive/predictive alert notification system, service CPQ, and parts, material, and returns management. PTC also offers service and asset monetization, intelligent product life cycle, AI actions, asset intelligence, and service campaigns capabilities. In addition, PTC offers interoperability with foundational

PTC products in computer-aided design (CAD) and a deep integration with PLM to connect the worlds of engineering, product development, and service.

Quick facts about PTC are as follows:

- **Number of employees:** >7,000 (850+ focused on aftermarket service)
- **Globalization:** Offering used in 100+ countries in 20+ languages
- **Industry focus:** Federal, aerospace and defense, medical devices, industrial equipment and products, electronics and high tech, and automotive
- **Number of partners:** >1,000
- **Deployment and delivery model:** On premises, hybrid, hosted private cloud, and hosted public cloud
- **AI enablement:** Agentic AI assistant for inventory optimization, forecasting, services parts pricing, and order planning; agentic AI-based service supply chain performance and productivity improvement of planners and multi-echelon optimization and order planning engines; and AI/ML-enhanced multivariate and MTBF and equipment data-based forecasting, comprehensive service-specific sales, inventory, and operations planning (SIOP) including consensus forecasting, budgeting, what-if scenario planning and monitoring, AI-powered service parts pricing simulation — all for enabling OEMs and dealers
- **Large language models supported:** Multimodal support including Microsoft Azure OpenAI GPT and Snowflake

Strengths

- **Validated MEO engine:** PTC's MEO is the core engine behind the level of inventory efficiency it is able to provide its customers, as it is validated through Monte Carlo simulation, blind tests, and predictive twin analysis. PTC is able to simultaneously optimize all parts across all echelons in a single instance delivering maximum value in an actionable time frame. Through its time-phased MEO engine, PTC is able to accurately evaluate trade-offs across stocking locations, accurately modeling fulfillment paths, avoiding the inefficiencies of siloed echelon planning, and benefitting from tactical planning, strategic planning, and SIOP. PTC has demonstrated multi-echelon and multidimensional optimization within complex service supply chains meeting the definition of MEO.
- **AI/ML-infused service supply chain capabilities and expertise:** PTC has a seasoned team of data scientists, PhD holders, and domain experts with decades of knowledge leading purposeful innovation in service supply chain and service parts management capabilities. PTC helps customers manage complex service supply chains by leveraging data science, artificial intelligence, and machine learning expertise. PTC supports its clients with a centralized team of AI scientists

and engineers supporting architecture, methodology, and cross-product alignment, which brings standardization and enhanced rigor across the technology stack. PTC recognizes that in the era of AI/ML and agentic AI, the path is not static. This era demands partnerships that can co-innovate and continuously explore the future together.

Challenge

- **Organizational inertia and a reluctance to digitally modernize:** The primary challenge facing PTC is organizations that view digital transformation within the service supply chain as a lower priority to other investments. This deprioritization can be the result of an organization's IT team being too far removed from the complexities impacting the service team. Too often, the aftermarket and service operations are expected to cobble together infrastructure to support its needs. PTC will need to continue to highlight its innovations and ability to aid customers in an increasingly complex environment that demands purpose-built solutions to ensure performance, accuracy, and quality outcomes.

Consider PTC When

Manufacturers and service organizations should consider PTC when they are looking for a technology partner that has established decades of expertise in managing complex, global service supply chains with an agentic AI–ready architecture. PTC has established an AI foundation that delivers certified and validated multi-echelon optimization models aiding customers with trade-offs, optimal decisions, and resource allocation. PTC empowers organizations to achieve maximum service levels, equipment uptime, and customer satisfaction at minimal costs — ensuring that the right part is in the right place at the right time for the right price.

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.

The size of the individual vendor markers in the IDC MarketScape represent the market share of each individual vendor within the specific market segment being assessed.

IDC has not yet published a document of vendor market shares for this specific market.

Each of the eight vendors in this IDC MarketScape for AI-enabled service parts management applications supports the broad range of capabilities needed within the end-to-end service parts management operation. This study is also focused on the impact of AI-enabled applications, and each vendor in this study has deployed or is actively investing in AI, GenAI, or agentic AI capabilities in support of the service parts operation. All vendors in this study are in the Leaders or Major Players category because of their ability to deliver across a variety of the functional areas needed to execute service parts management and service supply chain activities.

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 vendors in the service parts management and service supply chain technology space.

The market definitions to keep in mind are as follows:

- **Service parts management:** The management of service parts for the execution of a work order, including planning, forecasting, pricing, returns, repair, recalls, and refurbishment of service parts
- **Aftermarket service/service life-cycle management:** The process of servicing a product or asset through its lifetime, including 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:** A subset of AI techniques that enable computer systems to learn without human programming
- **Deep learning:** A subset of machine learning techniques that makes the computational multilayer neural networks feasible
- **Generative AI:** A subset of deep learning techniques that enable computers to create new content by 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 humanlike manner

LEARN MORE

Related Research

- *Market Analysis Perspective: Worldwide Aftermarket Services Strategies Applications, 2025* (IDC #US52011225, September 2025)
- *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 Service, 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 assess technology vendors participating in the AI-enabled service parts management applications market. The study also explores the emergence of AI-enabled applications in the aftermarket and its impact on the service supply chain.

"In the race to deliver exceptional service outcomes, AI is not just a tool. It's the catalyst transforming reactive support into predictive, proactive partnerships," says Aly Pinder, research vice president, Aftermarket Services Strategies, IDC. "Success will be measured

on a scale that values quality service experiences that can be delivered at scale and during every customer interaction. Ensuring the service team has the right service part to deliver every time will be the determining factor for differentiation and excellence."

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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