

# **Field Service Management Market Report by Solution (Schedule, Dispatch and Route Optimization, Customer Management, Work Order Management, Inventory Management, Service Contract Management, Reporting and Analytics, and Others), Service (Implementation and Integration, Training and Support, Consultancy Services), Deployment Mode (On-premises, Cloud-based), Organization Size (Large Enterprises, Small and Medium-sized Enterprises), End Use Industry (BFSI, IT and Telecom, Healthcare and Life Sciences, Manufacturing, Transportation and Logistics, Energy and Utilities, Construction, and Others), and Region 2024-2032**

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## **Abstracts**

The global field service management market size reached US\$ 5.1 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 17.3 Billion by 2032, exhibiting a growth rate (CAGR) of 14.1% during 2024-2032. The global market is primarily driven by advancements in technology, increasing demand for personalized customer service experiences, and the rising need for operational efficiency, with innovations in mobile connectivity, cloud computing, and artificial intelligence (AI).

Field Service Management Market Analysis:

Market Growth and Size: The market is experiencing significant growth, driven

by the increasing need for operational efficiency and enhanced customer service across various industries. This market's expansion is marked by a rising adoption of field service solutions, especially in sectors, such as manufacturing, healthcare, and IT, where efficient service delivery is crucial.

**Major Market Drivers:** Key drivers include technological advancements, the growing emphasis on customer satisfaction, and the need for efficient operational processes. The rise of mobile technology, cloud computing, and AI has been instrumental in propelling market growth, as they enable real-time tracking, improved communication, and efficient resource management.

**Technological Advancements:** Emerging innovations in AI, IoT, and mobile connectivity are revolutionizing field service management. These technologies facilitate predictive maintenance, enhance scheduling, and dispatch, and improve customer interaction, leading to increased productivity and reduced operational costs.

**Industry Applications:** The market finds applications in various industries, with manufacturing being the largest segment. Other significant applications include healthcare, where equipment maintenance is critical, and IT and telecom for managing network infrastructures, reflecting the market's versatility.

**Key Market Trends:** There's a notable trend towards cloud-based solutions for their scalability and cost-effectiveness, particularly among SMEs. The integration of AI for predictive analytics and the increasing use of mobile applications for field service operations are also prominent trends.

**Geographical Trends:** North America leads the market, largely due to its advanced technological infrastructure and high adoption rates. However, the Asia Pacific region is showing rapid growth due to digital transformation in industries and government initiatives for technological advancement.

**Competitive Landscape:** The market is characterized by the presence of key players who are focusing on innovation, global expansion, and strategic collaborations. These players are investing in R&D and forming partnerships to enhance their product offerings and expand their market reach.

**Challenges and Opportunities:** Challenges include the need for integration with existing systems and data security concerns, especially in cloud-based

deployments. However, these challenges present opportunities for innovation in secure, customizable solutions and for services that assist organizations in smoothly transitioning to advanced management systems.

## Field Service Management Market Trends:

### Technological advancements

The integration of mobile technology ensures that field service technicians can access critical information and communicate with their teams in real-time, even from remote locations. Cloud computing facilitates the centralization and accessibility of data, enabling service managers to make informed decisions based on real-time information. The Internet of Things (IoT) has revolutionized management by allowing connected devices to communicate issues and schedule maintenance automatically, reducing downtime and improving service efficiency. Artificial intelligence (AI) and machine learning (ML) are transforming the management by predicting service requirements, optimizing scheduling, and automating routine tasks, which enhances overall operational efficiency and customer satisfaction.

### Increasing demand for improved customer service

The emphasis on customer service is more critical than ever in the sector. Modern consumers expect quick, efficient, and personalized service experiences. Field service solutions help meet these expectations by ensuring that service technicians arrive on time, are well-prepared with the right information and tools, and can resolve issues effectively during the first visit. Features, including GPS tracking and automated scheduling reduce wait times and improve accuracy in service delivery. Customer portals and mobile apps provide transparency, allowing customers to track service progress, access service history, and communicate with technicians directly. This level of engagement and communication builds trust and enhances customer satisfaction, which is vital for customer retention and brand reputation.

### Growing need for operational efficiency

Efficient scheduling and dispatching of field personnel ensure that the right technician with the right skill set is sent to the correct location, minimizing travel time and costs. Inventory management capabilities ensure that parts and equipment are well-stocked and readily available, reducing delays and improving first-time fix rates. Workforce

management tools help in tracking technician performance, identifying training needs, and optimizing labor allocation. Data analytics and reporting tools provide valuable insights into operational performance, helping businesses identify areas for improvement, forecast demand, and manage resources more effectively. By reducing operational complexities and costs, these solutions enable businesses to focus on growth and innovation.

#### Field Service Management Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on solution, service, deployment mode, organization size and end use industry.

#### Breakup by Solution:

Schedule, Dispatch and Route Optimization

Customer Management

Work Order Management

Inventory Management

Service Contract Management

Reporting and Analytics

Others

Schedule, dispatch and route optimization accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the solution. This includes schedule, dispatch and route optimization, customer management, work order management, inventory management, service contract management, reporting and analytics, and others. According to the report, schedule, dispatch and route optimization represented the largest segment.

Schedule, dispatch, and route optimization segment, being the largest in the market, focuses on efficient scheduling of service tasks, dispatching the right technicians, and optimizing travel routes. It utilizes sophisticated algorithms to manage and allocate resources effectively, considering factors, such as technician skills, location, availability, and urgency of service requests. This optimization leads to reduced travel time and costs, increased productivity, and improved customer satisfaction by ensuring timely service deliveries. The adoption of this solution is crucial for businesses seeking to enhance operational efficiency and responsiveness in the management.

On the contrary, the customer management segment deals with managing customer interactions and relationships, essential for maintaining high service standards and customer satisfaction. This segment includes tools for tracking customer history, preferences, feedback, and communication. It ensures that businesses have a comprehensive understanding of their customers, enabling personalized service and fostering long-term relationships.

Furthermore, work order management involves the creation, assignment, tracking, and closure of work orders. This segment is essential for organizing and managing service requests efficiently. It provides field technicians with detailed information about tasks, including location, necessary tools, and customer details, enabling them to prepare adequately for service calls. This solution streamlines operations, reduces paperwork, and ensures that service commitments are met promptly, contributing to improved productivity and customer satisfaction.

Moreover, the inventory management segment addresses the tracking and management of parts, tools, and equipment required for field services. Efficient inventory management ensures that the necessary parts are available when needed, reducing delays, and improving first-time fix rates. This solution includes features, such as real-time inventory tracking, automated reordering, and management of supplier relationships, helping businesses minimize inventory costs while ensuring they are well-equipped to meet service demands.

Apart from this, service contract management segment involves managing service contracts and agreements with customers, including warranty management, service level agreements (SLAs), and recurring maintenance contracts. Effective service contract management helps in ensuring compliance with contractual obligations, setting clear expectations for service delivery, and generating steady revenue streams from long-term contracts.

Additionally, reporting and analytics provide critical insights into the performance of field service operations. This segment includes the analysis of data related to service calls, technician performance, customer satisfaction, and operational efficiency. By leveraging these insights, businesses can make informed decisions, identify areas for improvement, and strategize for future growth.

Breakup by Service:

Implementation and Integration

Training and Support

Consultancy Services

Implementation and integration hold the largest share in the industry

A detailed breakup and analysis of the market based on the service have also been provided in the report. This includes implementation and integration, training and support, and consultancy services. According to the report, implementation and integration accounted for the largest market share.

Implementation and Integration is the largest segment in the market as the implementation and integration services focus on the deployment of the management solutions and their integration with existing systems. This segment addresses the technical challenges of setting up new software, ensuring it works seamlessly with current business processes, data systems, and other software applications. It is crucial for businesses to adopt these services to maximize the benefits of the field service solutions, ensuring they are tailored to specific operational needs and workflows. Effective implementation and integration lead to increased efficiency, reduced errors, and a smoother transition to advanced field service practices.

On the other hand, the training and support segment is vital for ensuring that employees effectively use field service solutions. This service includes educating staff on how to utilize the new systems, providing ongoing support for any issues or questions that arise, and updating them on new features or updates. Training is essential for maximizing the return on investment in these solutions, as it ensures that all users are competent and confident in using the system, thereby enhancing overall productivity.

Furthermore, consultancy services in the market involve expert guidance to help businesses strategize and optimize their field service operations. This segment includes analyzing current service processes, identifying areas for improvement, and recommending tailored solutions to meet specific business goals. Consultants in this field bring industry expertise and insights, aiding businesses in navigating the complexities of the service management and making informed decisions about technology investments.

#### Breakup by Deployment Mode:

On-premises

Cloud-based

On-premises represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the deployment mode. This includes on-premises and cloud-based. According to the report, on premises represented the largest segment.

The on-premises deployment mode, currently the largest segment in the market, involves installing the software directly on a company's own servers and managing it internally. This model appeals to organizations that prioritize control over their IT infrastructure and data, often due to regulatory, security, or complex customization requirements. On-premises solutions offer a high degree of customization and integration with existing systems, making them suitable for businesses with specific needs that cloud solutions cannot meet.

On the other hand, cloud-based deployment of the management solutions is characterized by software hosted on the vendor's servers and accessed via the internet. This model offers greater flexibility, scalability, and cost-effectiveness compared to on-premises solutions. Businesses prefer cloud-based services for their ease of implementation, lower initial costs, and the ability to access the software from anywhere, which is particularly advantageous for field service operations.

#### Breakup by Organization Size:

Large Enterprises

## Small and Medium-sized Enterprises

Large enterprises exhibit a clear dominance in the market

A detailed breakup and analysis of the market based on the organization size have also been provided in the report. This includes large enterprises and small and medium-sized enterprises. According to the report, large enterprises accounted for the largest market share.

In the global market, large enterprises form the largest segment. These organizations typically have extensive operations, numerous field service personnel, and complex service delivery processes. The scale and scope of their operations necessitate robust management solutions that can handle large volumes of service requests, manage vast resource pools, and integrate with a variety of other enterprise systems. Large enterprises often require customized solutions with advanced features, such as AI-driven scheduling, comprehensive analytics, and extensive integration capabilities.

On the other hand, SMEs, while forming a smaller segment in the market compared to large enterprises, represent a significant and growing market share. These businesses typically require solutions that are cost-effective, easy to implement, and require minimal customization. Cloud-based solutions are particularly appealing to SMEs due to their scalability, lower upfront costs, and the reduced need for in-house IT expertise.

Breakup by End Use Industry:

BFSI

IT and Telecom

Healthcare and Life Sciences

Manufacturing

Transportation and Logistics

Energy and Utilities



Construction

Others

Manufacturing dominates the market

The report has provided a detailed breakup and analysis of the market based on the end use industry. This includes BFSI, IT and telecom, healthcare and life sciences, manufacturing, transportation and logistics, energy and utilities, construction, and others. According to the report, manufacturing represented the largest segment.

The manufacturing sector is the largest segment in the global market. This industry relies heavily on maintaining efficient operations and minimizing equipment downtime. Field service solutions in manufacturing are crucial for scheduling preventive maintenance, managing work orders, and ensuring that the right technicians are dispatched with the necessary parts and tools. These solutions help manufacturers keep their production lines running smoothly, reduce maintenance costs, and improve overall equipment effectiveness. The complex nature of manufacturing operations, with various machinery and processes, necessitates robust and comprehensive systems that can handle intricate scheduling, inventory management, and compliance requirements.

On the contrary, banking, financial services, and insurance (BFSI) field service solutions are employed to manage the maintenance and servicing of ATM machines, financial kiosks, and branch equipment. The focus here is on ensuring high availability and security of the equipment, which is critical to customer service and trust in the financial sector. These solutions help in scheduling regular maintenance, managing service tickets, and ensuring rapid response to issues, thereby minimizing downtime, and maintaining customer satisfaction.

Furthermore, for the IT and telecom sector, field service solutions are essential for installing, maintaining, and repairing complex network infrastructures. This sector demands quick response times and efficient management of field technicians to address outages and service degradations. The solutions in this segment offer capabilities for managing large-scale installations, routine maintenance, and emergency repairs, ensuring high service availability and customer satisfaction.

Moreover, in the healthcare and life sciences sector, field service solutions are critical for maintaining medical equipment, managing compliance with healthcare regulations,

and ensuring patient safety. These solutions facilitate the scheduling of regular maintenance checks, compliance reporting, and management of service requests for critical healthcare equipment. The focus is on reducing equipment downtime, ensuring reliability, and adhering to stringent healthcare standards.

Apart from this, transportation and logistics segment uses the solutions to maintain vehicles and logistics infrastructure. These solutions help in scheduling regular maintenance, managing repairs, and ensuring that vehicles and equipment are operational and efficient. Effective management in this sector is crucial for minimizing delays, reducing costs, and ensuring timely delivery of goods.

In the energy and utilities sector, the solutions are used to manage the installation, maintenance, and repair of infrastructure and equipment. This sector requires robust solutions for scheduling and dispatching technicians to remote locations, managing emergency responses, and ensuring regulatory compliance. The focus is on maintaining continuous service delivery and managing the large, distributed assets typical in this industry.

On the other hand, the construction industry employs the management solutions to manage equipment, schedule maintenance, and ensure that machinery is available and functional. These solutions help in tracking equipment usage, managing inventory, and scheduling preventive maintenance, which is vital for avoiding project delays and reducing costs.

#### Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America leads the market, accounting for the largest field service management market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia-Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

North America is the largest segment in the market as North America demonstrates a high adoption rate of field service solutions due to the presence of numerous large enterprises and technology companies. This region shows a strong preference for advanced technologies such as cloud computing, AI, and IoT, which are integral to modern field service systems. The market is driven by a focus on enhancing customer service, improving operational efficiencies, and the presence of a mature IT infrastructure. The region's well-established telecommunications and manufacturing sectors, along with a growing healthcare industry, significantly contribute to the demand for the solutions.

Furthermore, Asia Pacific region is experiencing rapid growth in the market, driven by the expanding manufacturing and IT sectors, particularly in countries, such as China, India, and Japan. The increasing adoption of digital technologies, along with a growing focus on customer service and operational efficiency, is fueling this growth. Small and medium-sized enterprises are particularly contributing to the demand for cloud-based solutions, given their cost-effectiveness and scalability.

On the other hand, Europe's market is characterized by a strong emphasis on automation and efficient service delivery, especially in developed economies, including Germany, the UK, and France. The region's strict regulations regarding data privacy and security influence the preference for on-premises and highly secure cloud-based solutions.

Moreover, in Latin America, the market for the management is growing steadily, driven by the digital transformation of businesses and the increasing need for operational efficiency. Countries, such as Brazil and Mexico are leading this growth, with sectors such as manufacturing, energy, and utilities adopting management solutions to enhance their service operations.

Additionally, the Middle East and Africa region is gradually adopting management solutions, particularly in the Gulf Cooperation Council (GCC) countries and South Africa. The growth in this market is driven by the need to diversify economies away from oil-

dependency and invest in technology-driven sectors. There is an increasing focus on enhancing customer service and operational efficiencies in industries, such as telecommunications, construction, and utilities, which is fostering the adoption of field service solutions in the region.

#### Leading Key Players in the Field Service Management Industry:

Key players in the market are actively engaged in various strategic initiatives to strengthen their market position and meet the changing needs of diverse industries. These initiatives include the development of more advanced and integrated solutions, leveraging technologies such as AI, IoT, and cloud computing to enhance efficiency, scalability, and user experience. They are also focusing on expanding their global reach through partnerships, mergers, and acquisitions, collaborating with technology providers and local firms to access new markets and customer segments. Additionally, significant investments in research and development are being made to innovate and tailor their offerings to specific industry requirements, thereby providing comprehensive and customizable solutions for businesses looking to optimize their field service operations. These efforts reflect the dynamic nature of the market and the continuous push towards more sophisticated, user-friendly, and efficient systems.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Accruent LLC (Fortive Corporation)

Comarch SA

IFS AB

Infor (Koch Industries Inc.)

Microsoft Corporation

Oracle Corporation

Salesforce.com Inc.

SAP SE

ServiceMax

ServicePower Inc.

Trimble Inc.

Zinier Inc.

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

#### Latest News:

10 January 2024: ServiceMax has announced a partnership with Encompass Simply Parts, one of the largest suppliers of genuine OEM replacement parts and accessories for home products.

13 October 2023: Zinier Inc. launched partnership program “Zinier Partner Program (ZPP)” to accelerate digital transformation in field service management. The ZPP is a strategic initiative emphasizing customer-focused partnerships to optimize field service operations, enhance customer satisfaction, and achieve service excellence, offering benefits that enhance partner expertise, business growth, and profitability while delivering exceptional value to clients.

17 April 2023: Accruent LLC (Fortive Corporation) unveils EMS Flex, Intelligent Workspace Booking Software for Hybrid Work Environment. This leading SaaS platform was developed specifically to maximize productivity and optimize space utilization in hybrid work environments.

#### Key Questions Answered in This Report:

How has the global field service management market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global field service management market?

What is the impact of each driver, restraint, and opportunity on the global field service management market?

What are the key regional markets?

Which countries represent the most attractive field service management market?

What is the breakup of the market based on the solution?

Which is the most attractive solution in the field service management market?

What is the breakup of the market based on the service?

Which is the most attractive service in the field service management market?

What is the breakup of the market based on the deployment mode?

Which is the most attractive deployment mode in the field service management market?

What is the breakup of the market based on the organization size?

Which is the most attractive organization size in the field service management market?

What is the breakup of the market based on the end use industry?

Which is the most attractive end use industry in the field service management market?

What is the competitive structure of the market?

Who are the key players/companies in the global field service management market?

## Contents

### **1 PREFACE**

### **2 SCOPE AND METHODOLOGY**

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
  - 2.3.1 Primary Sources
  - 2.3.2 Secondary Sources
- 2.4 Market Estimation
  - 2.4.1 Bottom-Up Approach
  - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

### **3 EXECUTIVE SUMMARY**

### **4 INTRODUCTION**

- 4.1 Overview
- 4.2 Key Industry Trends

### **5 GLOBAL FIELD SERVICE MANAGEMENT MARKET**

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

### **6 MARKET BREAKUP BY SOLUTION**

- 6.1 Schedule, Dispatch and Route Optimization
  - 6.1.1 Market Trends
  - 6.1.2 Market Forecast
- 6.2 Customer Management
  - 6.2.1 Market Trends
  - 6.2.2 Market Forecast
- 6.3 Work Order Management



- 6.3.1 Market Trends
- 6.3.2 Market Forecast
- 6.4 Inventory Management
  - 6.4.1 Market Trends
  - 6.4.2 Market Forecast
- 6.5 Service Contract Management
  - 6.5.1 Market Trends
  - 6.5.2 Market Forecast
- 6.6 Reporting and Analytics
  - 6.6.1 Market Trends
  - 6.6.2 Market Forecast
- 6.7 Others
  - 6.7.1 Market Trends
  - 6.7.2 Market Forecast

## **7 MARKET BREAKUP BY SERVICE**

- 7.1 Implementation and Integration
  - 7.1.1 Market Trends
  - 7.1.2 Market Forecast
- 7.2 Training and Support
  - 7.2.1 Market Trends
  - 7.2.2 Market Forecast
- 7.3 Consultancy Services
  - 7.3.1 Market Trends
  - 7.3.2 Market Forecast

## **8 MARKET BREAKUP BY DEPLOYMENT MODE**

- 8.1 On-premises
  - 8.1.1 Market Trends
  - 8.1.2 Market Forecast
- 8.2 Cloud-based
  - 8.2.1 Market Trends
  - 8.2.2 Market Forecast

## **9 MARKET BREAKUP BY ORGANIZATION SIZE**

- 9.1 Large Enterprises

- 9.1.1 Market Trends
- 9.1.2 Market Forecast
- 9.2 Small and Medium-sized Enterprises
  - 9.2.1 Market Trends
  - 9.2.2 Market Forecast

## **10 MARKET BREAKUP BY END USE INDUSTRY**

- 10.1 BFSI
  - 10.1.1 Market Trends
  - 10.1.2 Market Forecast
- 10.2 IT and Telecom
  - 10.2.1 Market Trends
  - 10.2.2 Market Forecast
- 10.3 Healthcare and Life Sciences
  - 10.3.1 Market Trends
  - 10.3.2 Market Forecast
- 10.4 Manufacturing
  - 10.4.1 Market Trends
  - 10.4.2 Market Forecast
- 10.5 Transportation and Logistics
  - 10.5.1 Market Trends
  - 10.5.2 Market Forecast
- 10.6 Energy and Utilities
  - 10.6.1 Market Trends
  - 10.6.2 Market Forecast
- 10.7 Construction
  - 10.7.1 Market Trends
  - 10.7.2 Market Forecast
- 10.8 Others
  - 10.8.1 Market Trends
  - 10.8.2 Market Forecast

## **11 MARKET BREAKUP BY REGION**

- 11.1 North America
  - 11.1.1 United States
    - 11.1.1.1 Market Trends
    - 11.1.1.2 Market Forecast

- 11.1.2 Canada
  - 11.1.2.1 Market Trends
  - 11.1.2.2 Market Forecast
- 11.2 Asia-Pacific
  - 11.2.1 China
    - 11.2.1.1 Market Trends
    - 11.2.1.2 Market Forecast
  - 11.2.2 Japan
    - 11.2.2.1 Market Trends
    - 11.2.2.2 Market Forecast
  - 11.2.3 India
    - 11.2.3.1 Market Trends
    - 11.2.3.2 Market Forecast
  - 11.2.4 South Korea
    - 11.2.4.1 Market Trends
    - 11.2.4.2 Market Forecast
  - 11.2.5 Australia
    - 11.2.5.1 Market Trends
    - 11.2.5.2 Market Forecast
  - 11.2.6 Indonesia
    - 11.2.6.1 Market Trends
    - 11.2.6.2 Market Forecast
  - 11.2.7 Others
    - 11.2.7.1 Market Trends
    - 11.2.7.2 Market Forecast
- 11.3 Europe
  - 11.3.1 Germany
    - 11.3.1.1 Market Trends
    - 11.3.1.2 Market Forecast
  - 11.3.2 France
    - 11.3.2.1 Market Trends
    - 11.3.2.2 Market Forecast
  - 11.3.3 United Kingdom
    - 11.3.3.1 Market Trends
    - 11.3.3.2 Market Forecast
  - 11.3.4 Italy
    - 11.3.4.1 Market Trends
    - 11.3.4.2 Market Forecast
  - 11.3.5 Spain

- 11.3.5.1 Market Trends
- 11.3.5.2 Market Forecast
- 11.3.6 Russia
  - 11.3.6.1 Market Trends
  - 11.3.6.2 Market Forecast
- 11.3.7 Others
  - 11.3.7.1 Market Trends
  - 11.3.7.2 Market Forecast
- 11.4 Latin America
  - 11.4.1 Brazil
    - 11.4.1.1 Market Trends
    - 11.4.1.2 Market Forecast
  - 11.4.2 Mexico
    - 11.4.2.1 Market Trends
    - 11.4.2.2 Market Forecast
  - 11.4.3 Others
    - 11.4.3.1 Market Trends
    - 11.4.3.2 Market Forecast
- 11.5 Middle East and Africa
  - 11.5.1 Market Trends
  - 11.5.2 Market Breakup by Country
  - 11.5.3 Market Forecast

## **12 SWOT ANALYSIS**

- 12.1 Overview
- 12.2 Strengths
- 12.3 Weaknesses
- 12.4 Opportunities
- 12.5 Threats

## **13 VALUE CHAIN ANALYSIS**

## **14 PORTERS FIVE FORCES ANALYSIS**

- 14.1 Overview
- 14.2 Bargaining Power of Buyers
- 14.3 Bargaining Power of Suppliers
- 14.4 Degree of Competition

14.5 Threat of New Entrants

14.6 Threat of Substitutes

## **15 PRICE ANALYSIS**

## **16 COMPETITIVE LANDSCAPE**

16.1 Market Structure

16.2 Key Players

16.3 Profiles of Key Players

16.3.1 Accruent LLC (Fortive Corporation)

16.3.1.1 Company Overview

16.3.1.2 Product Portfolio

16.3.2 Comarch SA

16.3.2.1 Company Overview

16.3.2.2 Product Portfolio

16.3.2.3 Financials

16.3.3 IFS AB

16.3.3.1 Company Overview

16.3.3.2 Product Portfolio

16.3.4 Infor (Koch Industries Inc.)

16.3.4.1 Company Overview

16.3.4.2 Product Portfolio

16.3.5 Microsoft Corporation

16.3.5.1 Company Overview

16.3.5.2 Product Portfolio

16.3.5.3 Financials

16.3.5.4 SWOT Analysis

16.3.6 Oracle Corporation

16.3.6.1 Company Overview

16.3.6.2 Product Portfolio

16.3.6.3 Financials

16.3.6.4 SWOT Analysis

16.3.7 Salesforce.com Inc.

16.3.7.1 Company Overview

16.3.7.2 Product Portfolio

16.3.7.3 Financials

16.3.7.4 SWOT Analysis

16.3.8 SAP SE

- 16.3.8.1 Company Overview
- 16.3.8.2 Product Portfolio
- 16.3.8.3 Financials
- 16.3.8.4 SWOT Analysis
- 16.3.9 ServiceMax
  - 16.3.9.1 Company Overview
  - 16.3.9.2 Product Portfolio
- 16.3.10 ServicePower Inc.
  - 16.3.10.1 Company Overview
  - 16.3.10.2 Product Portfolio
- 16.3.11 Trimble Inc.
  - 16.3.11.1 Company Overview
  - 16.3.11.2 Product Portfolio
  - 16.3.11.3 Financials
  - 16.3.11.4 SWOT Analysis
- 16.3.12 Zinier Inc.
  - 16.3.12.1 Company Overview
  - 16.3.12.2 Product Portfolio

## List Of Tables

### LIST OF TABLES

Table 1: Global: Field Service Management Market: Key Industry Highlights, 2023 and 2032

Table 2: Global: Field Service Management Market Forecast: Breakup by Solution (in Million US\$), 2024-2032

Table 3: Global: Field Service Management Market Forecast: Breakup by Service (in Million US\$), 2024-2032

Table 4: Global: Field Service Management Market Forecast: Breakup by Deployment Mode (in Million US\$), 2024-2032

Table 5: Global: Field Service Management Market Forecast: Breakup by Organization Size (in Million US\$), 2024-2032

Table 6: Global: Field Service Management Market Forecast: Breakup by End Use Industry (in Million US\$), 2024-2032

Table 7: Global: Field Service Management Market Forecast: Breakup by Region (in Million US\$), 2024-2032

Table 8: Global: Field Service Management Market: Competitive Structure

Table 9: Global: Field Service Management Market: Key Players

## List Of Figures

### LIST OF FIGURES

Figure 1: Global: Field Service Management Market: Major Drivers and Challenges

Figure 2: Global: Field Service Management Market: Sales Value (in Billion US\$), 2018-2023

Figure 3: Global: Field Service Management Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 4: Global: Field Service Management Market: Breakup by Solution (in %), 2023

Figure 5: Global: Field Service Management Market: Breakup by Service (in %), 2023

Figure 6: Global: Field Service Management Market: Breakup by Deployment Mode (in %), 2023

Figure 7: Global: Field Service Management Market: Breakup by Organization Size (in %), 2023

Figure 8: Global: Field Service Management Market: Breakup by End Use Industry (in %), 2023

Figure 9: Global: Field Service Management Market: Breakup by Region (in %), 2023

Figure 10: Global: Field Service Management (Schedule, Dispatch and Route Optimization) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 11: Global: Field Service Management (Schedule, Dispatch and Route Optimization) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 12: Global: Field Service Management (Customer Management) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 13: Global: Field Service Management (Customer Management) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 14: Global: Field Service Management (Work Order Management) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 15: Global: Field Service Management (Work Order Management) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 16: Global: Field Service Management (Inventory Management) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 17: Global: Field Service Management (Inventory Management) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 18: Global: Field Service Management (Service Contract Management) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 19: Global: Field Service Management (Service Contract Management) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 20: Global: Field Service Management (Reporting and Analytics) Market: Sales



Value (in Million US\$), 2018 & 2023

Figure 21: Global: Field Service Management (Reporting and Analytics) Market

Forecast: Sales Value (in Million US\$), 2024-2032

Figure 22: Global: Field Service Management (Other Solutions) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 23: Global: Field Service Management (Other Solutions) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 24: Global: Field Service Management (Implementation and Integration) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 25: Global: Field Service Management (Implementation and Integration) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 26: Global: Field Service Management (Training and Support) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 27: Global: Field Service Management (Training and Support) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 28: Global: Field Service Management (Consultancy Services) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 29: Global: Field Service Management (Consultancy Services) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 30: Global: Field Service Management (On-premises) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 31: Global: Field Service Management (On-premises) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 32: Global: Field Service Management (Cloud-based) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 33: Global: Field Service Management (Cloud-based) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 34: Global: Field Service Management (Large Enterprises) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 35: Global: Field Service Management (Large Enterprises) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 36: Global: Field Service Management (Small and Medium-sized Enterprises) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 37: Global: Field Service Management (Small and Medium-sized Enterprises) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 38: Global: Field Service Management (BFSI) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 39: Global: Field Service Management (BFSI) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 40: Global: Field Service Management (IT and Telecom) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 41: Global: Field Service Management (IT and Telecom) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 42: Global: Field Service Management (Healthcare and Life Sciences) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 43: Global: Field Service Management (Healthcare and Life Sciences) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 44: Global: Field Service Management (Manufacturing) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 45: Global: Field Service Management (Manufacturing) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 46: Global: Field Service Management (Transportation and Logistics) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 47: Global: Field Service Management (Transportation and Logistics) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 48: Global: Field Service Management (Energy and Utilities) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 49: Global: Field Service Management (Energy and Utilities) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 50: Global: Field Service Management (Construction) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 51: Global: Field Service Management (Construction) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 52: Global: Field Service Management (Other End Use Industries) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 53: Global: Field Service Management (Other End Use Industries) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 54: North America: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 55: North America: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 56: United States: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 57: United States: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 58: Canada: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 59: Canada: Field Service Management Market Forecast: Sales Value (in Million

US\$), 2024-2032

Figure 60: Asia-Pacific: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 61: Asia-Pacific: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 62: China: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 63: China: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 64: Japan: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 65: Japan: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 66: India: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 67: India: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 68: South Korea: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 69: South Korea: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 70: Australia: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 71: Australia: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 72: Indonesia: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 73: Indonesia: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 74: Others: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 75: Others: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 76: Europe: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 77: Europe: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 78: Germany: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 79: Germany: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 80: France: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 81: France: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 82: United Kingdom: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 83: United Kingdom: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 84: Italy: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 85: Italy: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 86: Spain: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 87: Spain: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 88: Russia: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 89: Russia: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 90: Others: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 91: Others: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 92: Latin America: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 93: Latin America: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 94: Brazil: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 95: Brazil: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 96: Mexico: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 97: Mexico: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 98: Others: Field Service Management Market: Sales Value (in Million US\$),

2018 & 2023

Figure 99: Others: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 100: Middle East and Africa: Field Service Management Market: Sales Value (in Million US\$), 2018 & 2023

Figure 101: Middle East and Africa: Field Service Management Market: Breakup by Country (in %), 2023

Figure 102: Middle East and Africa: Field Service Management Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 103: Global: Field Service Management Industry: SWOT Analysis

Figure 104: Global: Field Service Management Industry: Value Chain Analysis

Figure 105: Global: Field Service Management Industry: Porter's Five Forces Analysis

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