Oil and Gas Buyers Guide

Software Provider and Product Assessment

ISG Research

Buyers Guide Overview

ISG Research has conducted market research for over two decades across vertical industries, business applications, AI and IT. We have designed the ISG Buyers Guide™ to provide a balanced perspective of software providers and products that is rooted in an understanding of business and IT requirements. Utilization of our research methodology and decades of experience enables our Buyers Guide to be an effective method to assess and select software providers and products. The findings of this research provide a comprehensive approach to rating software providers and rank their ability to meet specific product and customer experience requirements.

> **ISG Research has designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of business and IT requirements.**

The 2025 ISG Buyers Guides™ for Oil and Gas, covering Oil and Gas, Oil and Gas Digital Twin, Oil and Gas EAM, Oil and Gas Field Service and Oil and Gas Predictive Maintenance, are the distillation of continuous market and product research. It is an assessment of how well software providers' offerings address enterprises' requirements for oil and gas industry software. The Value Index methodology is structured to support a request for information (RFI) for a request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. The ISG Buyers Guide evaluates customer experience and the product experience in its capability and platform.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. It can ensure the best long-term relationship and value achieved from a resource and financial investment We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of software can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its potential. In addition, this approach can reduce the project's development and deployment time and eliminate the risk of relying on opinions or historical biases.

ISG Research believes that an objective review of existing and potential new software providers and products is a critical strategy for the adoption and implementation of oil and gas industry software. An enterprise's review should include an analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating software and offer these Buyers Guides as both the results of our in-depth analysis of these providers and as an evaluation methodology.

How To Use This Buyers Guide

Evaluating Software Providers: The Process

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to assess existing approaches and software providers or establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes in the most efficient manner.

1. Define the business case and goals.
   Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. Specify the business and IT needs.
   Defining the business and IT requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. Assess the required roles and responsibilities.
   Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. Outline the project's critical path.
   What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.
5. Ascertain the technology approach.
   Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. Establish software provider evaluation criteria.
   Utilize the product experience: capability and platform with support for adaptability, manageability, reliability and usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the software provider and products properly.
   Apply a weighting the evaluation categories in the evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.
8. Establish the business initiative team to start the project.
   Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.

Using the ISG Buyers Guide and process provides enterprises a clear, structured approach to making smarter software and business investment decisions. It ensures alignment between strategy, people, processes and technology while reducing risk, saving time and improving outcomes. The ISG approach promotes data-driven decision-making and collaboration, helping choose the right software providers for maximum value and return on investment.

Oil and Gas

The world's population is expected to reach 9.7 billion by 2050, driving higher global energy demand and shaping the evolving role of oil and gas in a more diverse and technologically advanced energy system. As countries transform oil and gas infrastructure, operators must balance rising consumption with emissions-reduction goals, evolving regulations, supply chain constraints and geopolitical pressures. To remain competitive and reliable, the oil and gas sector must upgrade aging infrastructure, strengthen supply chain resilience, improve operational efficiency and adopt emerging technologies such as artificial intelligence, automation and digital twins. With increasing electrification, renewable energy integration and shifting market expectations, the industry faces significant challenges as it navigates a rapidly changing global energy landscape.

To remain competitive and reliable, the oil and gas sector must upgrade aging infrastructure, strengthen supply chain resilience, improve operational efficiency and adopt emerging technologies.

The industry operates complex, capital-intensive infrastructure encompasses upstream, midstream and downstream environments, requiring coordinated maintenance, field work and continuous monitoring to ensure safety, reliability and productivity. Today's software enhances visibility, streamlines workflows and strengthens operational performance across these environments. Digital twins provide real-time insight into critical assets, while enterprise asset management (EAM) and asset performance management (APM) platforms and predictive maintenance technologies improve reliability, reduce costs and extend equipment life. Field service management enhances scheduling, dispatch and technician enablement in demanding environments. Together, these capabilities help organizations operate more safely, efficiently and resiliently across distributed infrastructure.

ISG Research defines key software domains in the oil and gas industry as an integrated ecosystem that supports safe, reliable and efficient operations across asset-intensive environments. Digital twins provide real-time models of critical assets to improve performance and reduce operational costs. Enterprise asset management and asset performance management (APM) platforms guide asset life cycles, maintenance, labor, controls and supply chain needs to lower risk and maximize reliability. Field service management improves work execution through better scheduling, communication and technician support. Predictive maintenance applies data, analytics and machine learning to identify potential failures early and optimize maintenance planning. Together, these capabilities enable oil and gas organizations to manage operational complexity, strengthen safety and reliability and improve performance across the value chain.

The oil and gas sector relies on a vast network of infrastructure, including wells, pipelines, compressor stations, offshore platforms, refineries and storage facilities. These assets operate continuously, often under demanding or hazardous conditions, creating constant pressure to maintain safe and reliable production and transportation. Sustaining a steady energy supply requires continuous monitoring, maintenance and operational support across upstream, midstream and downstream systems.

The industry has evolved from manual processes, siloed systems and reactive maintenance toward a digitally connected operational landscape shaped by aging infrastructure, harsher environments, tightening regulations and a declining expert workforce. Historically, asset management, field service, maintenance and operational monitoring were labor-intensive and reactive, with limited visibility into equipment health. As demands for safety and reliability increased, operators adopted advanced digital technologies including IoT sensor networks, cloud-based architectures, AI-driven analytics, mobile tools, augmented reality and digital twins. These advancements have transformed traditional functions into intelligent, proactive and increasingly automated capabilities that support greater reliability, safety and operational resilience.

Enterprises evaluating next-generation operational technologies across digital twins, asset management, field service and predictive maintenance require platforms that streamline maintenance workflows, reduce manual effort and deliver measurable efficiency and cost savings. Tools that strengthen reliability through proactive and predictive insights, improve visibility into asset and equipment health and reduce downtime through optimized scheduling, resource allocation and maintenance planning are critical. Advanced systems must also support sustainability and regulatory expectations by modeling energy use, tracking emissions, reducing unnecessary maintenance activities and minimizing fuel consumption through more efficient field operations. Above all, enterprises should choose providers that enhance safety, operational resilience and long-term performance while enabling a more data-driven, efficient and future-ready operation.

Successful platforms in the oil and gas sector deliver unified and intelligent capabilities that address enterprise needs across asset management, field operations, digital twins and predictive maintenance.

Successful platforms in the oil and gas sector deliver unified and intelligent capabilities that address enterprise needs across asset management, field operations, digital twins and predictive maintenance. This requires software that streamlines maintenance and operational workflows, reduces manual effort and provides real-time visibility into equipment and system performance. The strongest offerings

incorporate predictive and AI-driven insights, IoT sensor data, mobile tools and digital twins to improve reliability, reduce downtime and optimize resource allocation. They must also support sustainability and compliance goals by modeling energy use, tracking emissions, reducing wasteful maintenance activity and enabling more efficient field and facility operations. Above all, successful software must improve safety, resilience and operational performance while supporting technicians, engineers and operators through a cohesive, user-driven experience.

> **Enterprises should select providers that support their transition from reactive, fragmented operations to integrated, predictive and data-driven environments.**

Enterprises should select providers that support the transition from reactive, fragmented operations to integrated, predictive and data-driven environments. This requires platforms that streamline maintenance and operational workflows, reduce manual effort and deliver measurable efficiency gains across asset lifecycle and performance management, field operations, digital twins and predictive maintenance. Providers must offer strong capabilities in asset visibility, predictive insights, optimized resource allocation and seamless integration across operational systems. Equally important is the ability to enhance safety, resilience and compliance while supporting sustainability through reduced fuel consumption, optimized energy use and improved emissions monitoring. By choosing software providers that combine AI, IoT, cloud technology, digital twins and advanced analytics within cohesive, user-friendly platforms, enterprises can strengthen reliability, maximize asset performance, improve field execution and future-proof operations.

The 2025 ISG Buyers Guide™ for Oil and Gas evaluates 6 software providers for key areas that include customer engagement; digital twin with asset modeling, integration, lifecycle, performance, visualization and ecosystem support; enterprise asset management or asset performance management with collaboration, management and operations; field service with mobile support, scheduling and dispatch optimization and work order management; proactive service and predictive maintenance. It also evaluates industry and platform support for analytics, data, devices, integration, knowledge management, AI support and investment. This research evaluates the following providers: GE Vernova, IBM, IFS, Oracle, PTC and SAP.

Key Takeaways

The oil and gas sector is managing rising operational complexity driven by aging infrastructure, regulatory pressures and evolving safety and reliability expectations. Enterprises are moving from manual and reactive practices to connected, data-driven operations enabled by AI, analytics, IoT and digital twins. As systems span upstream, midstream and downstream environments, organizations require integrated platforms that improve visibility, strengthen reliability and reduce operational risk. These shifts are reshaping how operators assess technologies that support efficiency, resilience and long-term performance.

Software Provider Summary

The ISG Buyers Guide™ for Oil and Gas evaluates six software providers that offer products supporting digital twins, enterprise asset management, field service management and predictive maintenance. The research ranked the top three overall leaders as IFS, GE Vernova and Oracle. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. GE Vernova, IFS and Oracle were rated as Exemplary, with SAP rated as Innovative. IBM and PTC were rated as Assurance.

Product Experience Insights

Product Experience, representing 80% of the evaluation, focuses on Capability (30%) and Platform (50%) and includes adaptability, manageability, reliability and usability. IFS, GE Vernova and SAP achieved the highest performance as Leaders in this category, supported by the ability to meet a broad range of oil and gas functional requirements and strong platform robustness across integration, governance and usability. Leaders demonstrated enterprise-grade platform capabilities across varied roles and contexts.

Customer Experience Value

Customer Experience, which accounts for 20% of the evaluation, focuses on validation and TCO/ROI. GE Vernova, Oracle and IFS were the Leaders in this category, showing strong customer advocacy and clear investment in success outcomes. Providers with lower performance often lacked publicly available customer validation or failed to demonstrate structured ROI measurement and proactive lifecycle engagement.

Strategic Recommendations

Enterprises should prioritize platforms that streamline maintenance and field operations while improving safety and resilience. Buyers should focus on providers that deliver predictive insights, integrate IoT and analytics and support sustainability and compliance needs. Systems that reduce manual effort and offer intuitive, role-based experiences will strengthen adoption and operational effectiveness. Aligning capabilities to enterprise complexity and reliability requirements will help organizations advance toward more efficient, data-driven operations.

The Findings – Oil and Gas

The software providers and products evaluated in the research provide product and customer experiences, but not everything offered is equally valuable to every enterprise or is needed to operate in business processes and use cases. Moreover, the existence of too many capabilities in products may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities in the product is important, and where they match your enterprise's requirements.

An effective customer relationship with a software provider is vital to the success of any investment. The overall customer experience and the full lifecycle of engagement play a key role in ensuring satisfaction and long-term success. Providers with dedicated customer leadership, such as chief customer officers, tend to invest more deeply in these relationships and prioritize customer outcomes to TCO and ROI expectations. It is equally important that this commitment to customer success is clearly demonstrated throughout the provider's website, buying process and customer journey.

Overall Scoring of Software Providers Across Categories

The research finds IFS atop the list, followed by GE Vernova and Oracle. Providers that place in the top three of a category earn the designation of Leader. IFS has done so in five categories, GE Vernova and Oracle in four, SAP in two and IBM in one category.

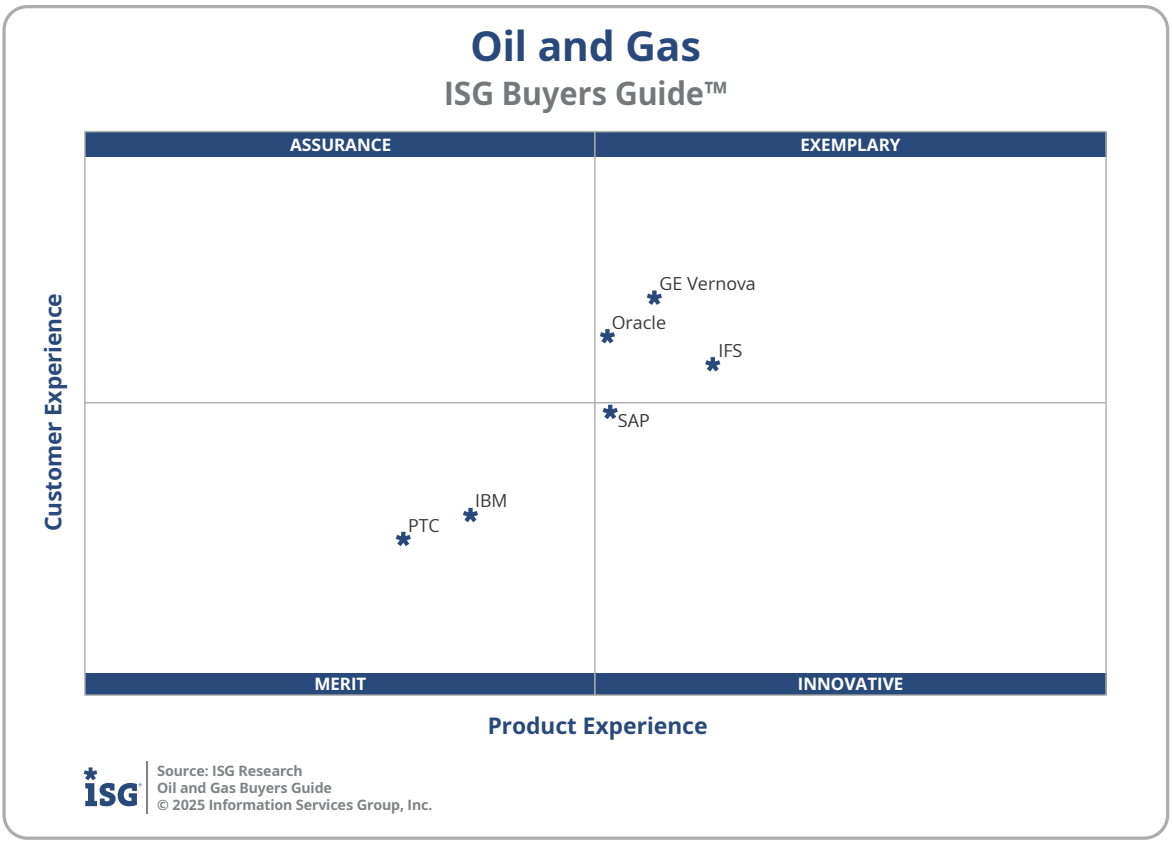
The overall representation of the research below places the rating of the Product Experience and Customer Experience on the *x* and *y* axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have above median weighted performance to the axis in aggregate of the two product categories place farther to the right, while the performance and weighting for the Customer Experience category determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

Oil and Gas
Overall

Providers	Grade	Performance
IFS	B++	Leader 79.7%
GE Vernova	B++	Leader 78.6%
Oracle	B++	Leader 77.6%
SAP	B++	77.1%
IBM	B+	73.8%
PTC	B+	72.4%

ISG
Source: ISG Research
Oil and Gas Buyers Guide

The research categorizes and rates software providers into one of four categories: Assurance, Exemplary, Merit or Innovative. This representation of software providers' weighted performance in meeting the requirements in product and customer experience.



Exemplary: This rating (upper right) represents those that performed above median in Product and Customer Experience requirements. The providers rated Exemplary are: GE Vernova, IFS and Oracle.

Innovative: This rating (lower right) represents those that performed above median in Product Experience but not in Customer Experience. The provider rated Innovative is: SAP.

Assurance: This rating (upper left) represents those that performed above median in Customer Experience but not in Product Experience.

Merit: This rating (lower left) represents those that did not surpass the median in Customer or Product Experience. The providers rated Merit are: IBM and PTC.

We advise enterprises to use this research as a supplement to their own evaluations, recognizing that ratings or rankings do not solely represent the value of a provider nor indicate universal suitability of a set of products.

Product Experience

The process of researching products to address an enterprise's needs should be comprehensive and evaluate specific capabilities and the underlying platform to the product experience. Our evaluation of the Product Experience examines the lifecycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future.

Oil and Gas
Product Experience

Providers	Grade	Performance
IFS	B++	*Leader* 63.6%
GE Vernova	B++	*Leader* 62.4%
SAP	B++	*Leader* 61.6%
Oracle	B++	61.5%
IBM	B+	58.7%
PTC	B+	57.4%

Source: ISG Research
Oil and Gas Buyers Guide

The research results in Product Experience are ranked at 80%, or four-fifths, using the underlying weighted performance. Importance was placed on the categories as follows: Capability (30%) and Platform (50%). IFS, GE Vernova and SAP were designated Product Experience Leaders. While not a Leader, Oracle was also found to meet a broad range of enterprise product experience requirements.

Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The evaluation of the Customer Experience and the entire lifecycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. The ISG Buyers Guide examines a software provider's customer commitment, viability, customer success, sales and onboarding, product roadmap and services with partners and support. The customer experience category also investigates the TCO/ROI and how well a software provider demonstrates the product's overall value, cost and benefits, including the tools and resources to evaluate these factors.

The research results in Customer Experience are ranked at 20%, or one-fifth of the 100% index, and represent the underlying provider validation and TCO/ROI requirements as they relate to the framework of commitment and value to the software provider-customer relationship.

The software providers that evaluated the highest in the Customer Experience category are GE Vernova, Oracle and IFS. These category leaders best communicate commitment and dedication to customer needs.

Oil and Gas

Customer Experience

Providers	Grade	Performance
GE Vernova	A-	*Leader* 16.4%
Oracle	B++	*Leader* 16.1%
IFS	B++	*Leader* 15.9%
SAP	B++	15.6%
IBM	B+	14.9%
PTC	B+	14.7%

Source: ISG Research
Oil and Gas Buyers Guide

Software providers that did not perform well in this category were unable to provide or make sufficient information readily available to demonstrate success or articulate their commitment to customer experience. The use of a software provider requires continuous investment, so a holistic evaluation must include examination of how they support their customer experience.

Software Provider Inclusion – Oil and Gas

For inclusion in the ISG Buyers Guide™ for overall Oil and Gas in 2025, a software provider must be in good standing financially and ethically, have at least $25 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents, and have at least 25 customers. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the past 12 months.

All software providers that offer relevant products and meet the inclusion requirements are invited to participate in the Buyers Guide evaluation process, at no cost to them. If a provider does not respond to or decline the invitation, a determination is made whether to include it in our analysis based on our defined set of inclusion criteria. These criteria are designed to ensure we include in our evaluation providers' geographic operations, customer base and revenue as well as all relevant aspects of the products' fit for the particular category being evaluated.

If a provider is actively marketing, selling and developing a product as reflected on its website that is within the scope of the Buyers Guide, it is automatically evaluated for inclusion. We have adopted this approach because we view it as our responsibility to assess all relevant providers whether or not they choose to actively participate.

Software providers with defined functionality are evaluated on the ability to offer a combination (if not all) of the following capabilities:

- Customer engagement
- Digital twin
- Enterprise asset management or asset performance management (required)
- Field service (required)
- Predictive maintenance (required)

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer application suites or packages of products that may include relevant individual modules or applications.

Products Evaluated

Provider	Product Names	Version	Release Month/Year
GE Vernova	Asset Performance Management, APM Integrity Mobile, APM Rounds Pro, Autonomous Inspection, GridOS Field, GridOS Orchestration Software, GridOS Visual Intelligence, GridOS Geo Network Management, GridOS Data Fabric, Mobile Enterprise Suite, Proficy CSense, SmartSignal	V5.3.x 1.5.1	December 2025
IBM	Maximo Application Suite, Maximo Collaborate, Maximo Field Service Management, Maximo EAM, Maximo IoT, Maximo Manage, Maximo Mobile, Monitor and Health, Maximo Oil and Gas, Maximo Optimizer, Maximo Predict	9.2 8.0	November 2025
IFS	Cloud EAM, Copperleaf, Field Service Management, Ultimo EAM	25R2 24.4	November 2025 December 2024
Oracle	Fusion Cloud SCM, Fusion Field Service, IoT	26A 25.10	December 2025 November 2025 September 2025
PTC	ThingWorx Industrial IoT Platform, ThingWorx Analytics, ThingWorx Applications, ThingWorx Predictive, Maintenance, Service Board, ServiceMax AI, ServiceMax Core, ServiceMax FieldFX, ServiceMax Go, ServiceMax Asset 360 for Salesforce	10.0 25R2 / 25.2 13.0 4.0 12	December 2025
SAP	Intelligent Asset Management, Aset Performance Management, Field Service Management, S/4 HANA Cloud	2511	November 2025

Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the criteria for inclusion in this Buyers Guide. These are listed below as "Providers of Promise."

Provider	Product	Capability	Customers	Geography	Revenue
Bentley Systems	AssetWise, iTwin, OpenPlant, PlantSight, SACS SPIDAstudio	No	Yes	Yes	Yes
Hexagon	HxGN APM, HxGN EAM, HxGN EAM Digital Work, HxGM NetWorks, HxGN SDx.	No	Yes	Yes	Yes
Hitachi Energy	APM, Asset Suite EAM, Ellipse EAM, Energy Portfolio Management, eSOMS, Lumada Asset and Work Management, Network Manager, Network SCADA and GMS, Service Suite.	No	Yes	Yes	Yes
Ramco	EAM, ERP	No	Yes	Yes	Yes

Oil and Gas Digital Twin

The oil and gas sector depends on complex, capital-intensive infrastructure that operates continuously, often in hazardous or remote environments, requiring real-time insight to maintain safety, efficiency and reliability. Digital twin technology supports these needs by creating virtual models of wells, pipelines, compressors, offshore platforms, refinery units and other critical assets. These models enable operators to monitor conditions, evaluate performance and anticipate issues across the asset lifecycle. With improved visibility, digital twins enhance asset performance, reduce maintenance costs and support safer, more resilient operations across the value chain.

> **Digital twins enable operators to monitor conditions, evaluate performance and anticipate issues across the asset lifecycle.**

ISG Research defines digital twins in the oil and gas industry as virtual representations of physical assets that support lifecycle management, asset health monitoring, maintenance, repair and operations controls, supply chain processes and remote or autonomous operations. By providing a real-time, data-driven view of asset condition and behavior, digital twins help improve performance, extend life and reduce operational costs through simulation, analytics and predictive intelligence.

Managing oil and gas assets is becoming more challenging as infrastructure ages, operating environments grow more severe and experienced talent becomes harder to replace. To address these pressures, operators are adopting digital twin platforms that improve reliability, reduce costs and support complex operational demands. Today's offerings combine AI, IoT sensor data, cloud architectures, mobile tools and visualization technologies to model asset behavior, optimize maintenance and strengthen field operations.

Enterprises evaluating digital twin providers should prioritize platforms that streamline maintenance, reduce manual effort and deliver efficiency and cost gains through improved asset visibility and minimized downtime. Effective platforms enhance reliability with predictive maintenance, enable real-time performance assessment and support sustainability by modeling energy use, tracking emissions and identifying opportunities to reduce impacts. Selecting providers with these capabilities helps organizations strengthen safety, operational resilience and long-term performance in demanding environments.

The 2025 ISG Buyers Guide™ for Digital Twin evaluates 10 software providers in key areas that include asset modeling, integration, lifecycle, performance, visualization and ecosystem support, built-in access to asset, predictive maintenance, industry-specific functionality, platform support for analytics, data, devices, integration and knowledge management; AI support and investment. This research evaluates the following software providers: AspenTech, Bentley Systems, ETAP, GE Vernova, Hexagon, IBM, IFS, PTC, SAP and Siemens.

Key Takeaways

Oil and gas operators face mounting complexity as aging infrastructure, hazardous environments and workforce constraints increase the need for real-time operational awareness. Digital twins address these pressures by providing data-driven models that support monitoring, performance evaluation and predictive insights across the asset lifecycle. Enterprises transitioning to advanced operations benefit from integrated platforms that strengthen reliability, reduce manual effort and improve visibility across distributed systems. These shifts are shaping how organizations adopt technologies that enhance efficiency, resilience and long-term operational stability.

Software Provider Summary

The ISG Buyers Guide™ for Oil and Gas Digital Twin evaluates 10 software providers that offer products supporting asset modeling, integration, performance, visualization, predictive maintenance and AI-driven operational intelligence. The research ranked the top three overall leaders as GE Vernova, IFS and PTC. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. GE Vernova, IBM, IFS and SAP were rated as Exemplary, with PTC rated as Innovative. AspenTech and Siemens were rated as Assurance, and Bentley Systems, ETAP and Hexagon were rated as Merit.

Product Experience Insights

Product Experience, representing 80% of the evaluation, focuses on Capability (35%) and Platform (45%) and includes adaptability, manageability, reliability and usability. GE Vernova, IFS and PTC achieved the highest performance as Leaders in this category, supported by the strength in digital twin capability breadth and robust platform foundations that scale reliably across diverse operational environments. Leaders demonstrated enterprise-grade platform capabilities across varied roles and contexts.

Customer Experience Value

Customer Experience, representing 20% of the evaluation, focuses on validation and TCO/ROI. GE Vernova, IFS, SAP and Siemens were the Leaders in this category, showing strong customer advocacy and clear investment in success outcomes. Providers with lower performance often lacked publicly available customer validation or failed to demonstrate structured ROI measurement and proactive lifecycle engagement.

Strategic Recommendations

Enterprises should prioritize digital twin platforms that strengthen asset visibility, streamline maintenance workflows and support predictive operational insights. Buyers should favor providers that integrate AI, IoT, analytics and scalable platform capabilities to improve reliability and reduce manual effort. Systems that model energy use, track emissions and enhance sustainability performance will help organizations advance operational resilience. Aligning provider capabilities to enterprise complexity, safety requirements and modernization goals will accelerate the shift toward more efficient, data-driven operations.

The Findings – Oil and Gas Digital Twin

The software providers and products evaluated in the research provide product and customer experiences, but not everything offered is equally valuable to every enterprise or is needed to operate in business processes and use cases. Moreover, the existence of too many capabilities in products may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities in the product is important, and where they match your enterprise's requirements.

An effective customer relationship with a software provider is vital to the success of any investment. The overall customer experience and the full lifecycle of engagement play a key role in ensuring satisfaction and long-term success. Providers with dedicated customer leadership, such as chief customer officers, tend to invest more deeply in these relationships and prioritize customer outcomes to TCO and ROI expectations. It is equally important that this commitment to customer success is clearly demonstrated throughout the provider's website, buying process and customer journey.

Overall Scoring of Software Providers Across Categories

The research finds GE Vernova atop the list, followed by IFS and PTC. Providers that place in the top three of a category earn the designation of Leader. GE Vernova and IFS has done so in five categories, PTC in three, SAP in two and Siemens in one category.

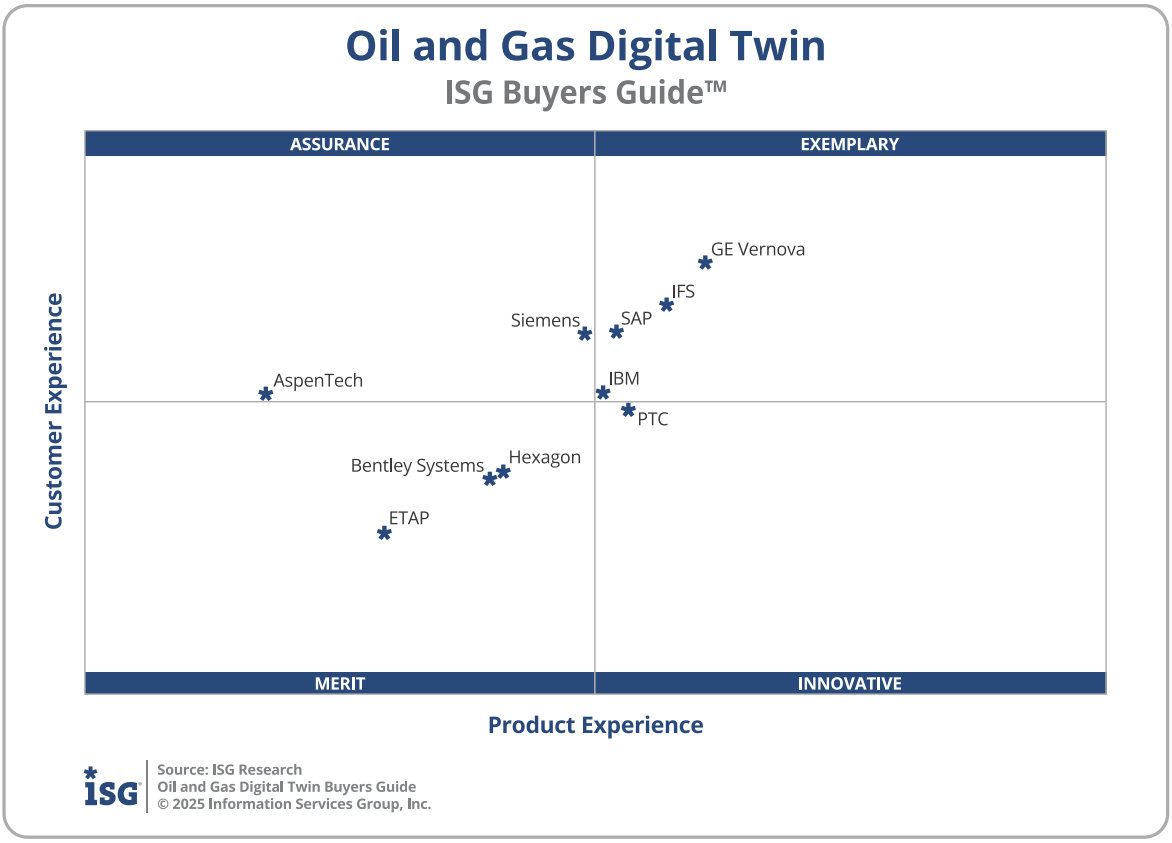
The overall representation of the research below places the rating of the Product Experience and Customer Experience on the *x* and *y* axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have above median weighted performance to the axis in aggregate of the two product categories place farther to the right, while the performance and weighting for the Customer Experience category determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

Oil and Gas Digital Twin
Overall

Providers	Grade	Performance
GE Vernova	B++	*Leader* 81.1%
IFS	B++	*Leader* 78.8%
SAP	B++	*Leader* 76.1%
PTC	B++	75.6%
Siemens	B+	74.6%
IBM	B+	74.4%
Hexagon	B+	68.9%
Bentley Systems	B	68.2%
ETAP	B	62.5%
AspenTech	B-	59.0%

Source: ISG Research
Oil and Gas Digital Twin Buyers Guide

The research categorizes and rates software providers into one of four categories: Assurance, Exemplary, Merit or Innovative. This representation of software providers' weighted performance in meeting the requirements in product and customer experience.



Exemplary: This rating (upper right) represents those that performed above median in Product and Customer Experience requirements. The providers rated Exemplary are: GE Vernova, IBM, IFS and SAP.

Innovative: This rating (lower right) represents those that performed above median in Product Experience but not in Customer Experience. The providers rated Innovative are: PTC.

Assurance: This rating (upper left) represents those that performed above median in Customer Experience but not in Product Experience. The providers rated Assurance are: AspenTech and Siemens.

Merit: This rating (lower left) represents those that did not surpass the median in Customer or Product Experience. The providers rated Merit are: Bentley Systems, ETAP, and Hexagon.

We advise enterprises to use this research as a supplement to their own evaluations, recognizing that ratings or rankings do not solely represent the value of a provider nor indicate universal suitability of a set of products.

Product Experience

The process of researching products to address an enterprise's needs should be comprehensive and evaluate specific capabilities and the underlying platform to the product experience. Our evaluation of the Product Experience examines the lifecycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future.

Oil and Gas Digital Twin
Product Experience

Providers	Grade	Performance
GE Vernova	B++	Leader 64.8%
IFS	B++	Leader 62.9%
PTC	B++	Leader 61.0%
SAP	B++	60.4%
IBM	B+	59.6%
Siemens	B+	58.9%
Hexagon	B	55.0%
Bentley Systems	B	54.3%
ETAP	B-	49.1%
AspenTech	C++	43.5%

Source: ISG Research
Oil and Gas Digital Twin Buyers Guide

The research results in Product Experience are ranked at 80%, or four-fifths, using the underlying weighted performance. Importance was placed on the categories as follows: Capability (35%) and Platform (45%). GE Vernova, IFS and PTC were designated Product Experience Leaders.

Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The evaluation of the Customer Experience and the entire lifecycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. The ISG Buyers Guide examines a software provider's customer commitment, viability, customer success, sales and onboarding, product roadmap and services with partners and support. The customer experience category also investigates the TCO/ROI and how well a software provider demonstrates the product's overall value, cost and benefits, including the tools and resources to evaluate these factors.

The research results in Customer Experience are ranked at 20%, or one-fifth of the 100% index, and represent the underlying provider validation and TCO/ROI requirements as they relate to the framework of commitment and value to the software provider-customer relationship.

The software providers that evaluated the highest in the Customer Experience category are GE Vernova, IFS, SAP and Siemens. These category leaders best communicate commitment and dedication to customer needs.

Oil and Gas Digital Twin
Customer Experience

Providers	Grade	Performance
GE Vernova	A-	*Leader* 16.4%
IFS	B++	*Leader* 15.9%
SAP	B++	*Leader* 15.6%
Siemens	B++	*Leader* 15.6%
IBM	B+	14.9%
AspenTech	B+	14.8%
PTC	B+	14.7%
Hexagon	B+	14.0%
Bentley Systems	B+	13.9%
ETAP	B	13.3%

ISG
Source: ISG Research
Oil and Gas Digital Twin Buyers Guide

Software providers that did not perform well in this category were unable to provide or make sufficient information readily available to demonstrate success or articulate their commitment to customer experience. The use of a software provider requires continuous investment, so a holistic evaluation must include examination of how they support their customer experience.

Software Provider Inclusion – Oil and Gas Digital Twin

For inclusion in the ISG Buyers Guide™ for overall Oil and Gas Digital Twin in 2025, a software provider must be in good standing financially and ethically, have at least $25 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents, and have at least 25 customers. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the past 12 months.

All software providers that offer relevant products and meet the inclusion requirements are invited to participate in the Buyers Guide evaluation process, at no cost to them. If a provider does not respond to or decline the invitation, a determination is made whether to include it in our analysis based on our defined set of inclusion criteria. These criteria are designed to ensure we include in our evaluation providers' geographic operations, customer base and revenue as well as all relevant aspects of the products' fit for the particular category being evaluated.

If a provider is actively marketing, selling and developing a product as reflected on its website that is within the scope of the Buyers Guide, it is automatically evaluated for inclusion. We have adopted this approach because we view it as our responsibility to assess all relevant providers whether or not they choose to actively participate.

Software providers with defined functionality are evaluated on the ability to offer a combination (if not all) of the following capabilities:

- Digital twin (required)
  - Modeling and simulation
  - Integration and IoT
  - Asset performance and predictive
  - Lifecycle and asset performance
  - Visualization and collaboration
- Access to EAM or APM
- Access to predictive maintenance

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer application suites or packages of products that may include relevant individual modules or applications.

Products Evaluated

Provider	Product Names	Version	Release Month/Year
AspenTech	APM, Aspen Mtell, OSI ADMS, OSI GMS	4.0 V15	May 2025
Bentley Systems	AssetWise, iTwin, OpenPlant, OpenUtilities, PlantSight, SACS SPIDAstudio.	6.0 25.0.2 V3.0	October 2025 February 2025
ETAP	ETAP	2024.0.3	July 2025
GE Vernova	Asset Performance Management, APM Integrity Mobile, APM Rounds Pro, Autonomous Inspection, GridOS Field, GridOS Orchestration Software, GridOS Visual Intelligence, GridOS Geo Network Management, GridOS Data Fabric, Mobile Enterprise Suite, Proficy CSense, SmartSignal	V5.3.x 1.5.1	December 2025
Hexagon	HxGN APM, HxGN EAM, HxGN EAM Digital Work, HxGN SDx.	12.3	December 2025, November 2025, February 2025
IBM	Maximo Application Suite, Maximo Collaborate, Maximo Field Service Management, Maximo EAM, Maximo IoT, Maximo Manage, Maximo Mobile, Monitor and Health, Maximo Oil and Gas, Maximo Optimizer, Maximo Predict	9.2 8.0	November 2025
IFS	Cloud EAM, Copperleaf, Field Service Management, Ultimo EAM	25R2 24.4	November 2025 December 2024
PTC	ThingWorx Industrial IoT Platform, ThingWorx Analytics, ThingWorx Applications, ThingWorx Predictive, Maintenance, Service Board, ServiceMax AI, ServiceMax Core, ServiceMax FieldFX, ServiceMax Go, ServiceMax Asset 360 for Salesforce	10.0 25R2 / 25.2 13.0 4.0 12	December 2025
SAP	Intelligent Asset Management, Aset Performance	2511	November 2025

	Management, Field Service Management, S/4 HANA Cloud		
Siemens	COMOS, Topsides, Xcelerator	N/A	December 2025

Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the criteria for inclusion in this Buyers Guide. These are listed below as "Providers of Promise."

Provider	Product	Capability	Customers	Geography	Revenue
ABB	Ability SafetyInsight	No	Yes	Yes	Yes
Microsoft	Azure Digital Twins	No	Yes	Yes	Yes
Schneider Electric	DORIS Group, AVEVA	No	Yes	Yes	Yes

Oil and Gas EAM

The oil and gas sector relies on an extensive network of high-value assets, including wells, pipelines, compressors, offshore platforms, refineries and storage facilities. These assets operate in harsh, hazardous environments and require strong asset management practices to maintain safety, reliability and productivity. Enterprise asset management (EAM) or asset performance management (APM) software helps operators monitor and maintain equipment across its lifecycle, improving performance, reducing maintenance costs and supporting safe and compliant operations. With greater visibility and informed decision-making, EAM and APM systems help maximize uptime and keep infrastructure running efficiently.

ISG Research defines EAM as software that supports asset lifecycle management, maintenance, repair and operations, labor and controls management, supply chain and spare-parts logistics, asset health monitoring, digital enablement and remote monitoring. By providing a data-driven view of asset condition and behavior, EAM and APM platforms increase performance, extend asset life and lower the cost of maintaining complex, capital-intensive systems.

> **EAM systems help maximize uptime and keep infrastructure running efficiently.**

Asset management becomes more challenging as infrastructure ages, operating environments grow severe and experienced personnel retire. These pressures are driving organizations to adopt advanced EAM and APM platforms that improve reliability, reduce costs and support interconnected operations without disrupting production. Newer systems combine AI, IoT data, cloud architectures, mobile capabilities and visualization technologies to enable predictive maintenance, strengthen field operations and improve emissions reporting. This shift is reshaping the market by providing the insight for rising performance, safety and regulatory expectations.

Enterprises evaluating EAM and APM providers should prioritize platforms that streamline maintenance processes, reduce manual effort and deliver efficiency gains through better asset utilization and reduced downtime. Today's offerings enhance reliability through predictive maintenance, provide real-time visibility into equipment health and support sustainability by tracking emissions, optimizing energy use and improving compliance. Selecting providers with these capabilities strengthen operations and improve outcomes.

The 2025 ISG Buyers Guide™ for Enterprise Asset Management evaluates 11 software providers in key areas that include support for collaboration, management, operations and performance; access to digital twins and predictive maintenance; industry-specific functionality; platform support for analytics, data, devices, integration and knowledge management; and AI support and investment. This research evaluates the following providers: AspenTech, AssetWorks, Bentley Systems, GE Vernova, Hexagon, IBM, IFS, Oracle, PTC, Ramco and SAP.

Key Takeaways

Oil and gas enterprises face rising operational pressures as aging infrastructure, hazardous environments and talent constraints increase the need for stronger asset reliability and visibility. EAM and APM platforms address these challenges by providing data-driven insight to support maintenance planning, asset health monitoring and safe, compliant operations. Organizations with updated operational ecosystems benefit from integrated platforms that reduce manual effort, improve equipment performance and strengthen resilience across distributed environments. These shifts shape how operators select technologies that enhance efficiency, safety and long-term operational stability.

Software Provider Summary

The ISG Buyers Guide™ for Enterprise Asset Management evaluates 11 software providers that offer products supporting collaboration, operations, digital twins, performance, predictive maintenance, industry-specific functionality and platform capabilities across analytics, data, devices, integration and AI. The research ranked the top three overall leaders as GE Vernova, IFS and Oracle. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. GE Vernova, IBM, IFS, Oracle and SAP were rated as Exemplary, with PTC rated as Innovative. AspenTech was rated as Assurance, and AssetWorks, Bentley Systems, Hexagon and Ramco were rated as Merit.

Product Experience Insights

Product Experience, representing 80% of the evaluation, focuses on Capability (35%) and Platform (45%) and includes adaptability, manageability, reliability and usability. IFS, GE Vernova and Oracle achieved the highest performance as Leaders in this category, supported by the breadth of EAM or APM capabilities and strong underlying platform reliability and scalability across enterprise environments. Leaders demonstrated enterprise-grade platform capabilities across varied roles and contexts.

Customer Experience Value

Customer Experience, which accounts for 20% of the evaluation, focuses on validation and TCO/ROI. GE Vernova, Oracle and IFS were the Leaders in this category, showing strong customer advocacy and clear investment in success outcomes. Providers with lower performance often lacked publicly available customer validation or failed to demonstrate structured ROI measurement and proactive lifecycle engagement.

Strategic Recommendations

Enterprises should prioritize EAM platforms that streamline maintenance workflows, strengthen reliability and provide real-time visibility into asset performance. Buyers should seek providers that combine predictive insights, integrated AI and strong platform capabilities to reduce manual effort and support safety and compliance requirements. Software that helps track emissions, optimizes energy use and improves operational efficiency will advance transformation goals. Aligning provider capabilities with enterprise scale, asset complexity and regulatory expectations will support long-term operational performance and resilience.

The Findings – Oil and Gas EAM

The software providers and products evaluated in the research provide product and customer experiences, but not everything offered is equally valuable to every enterprise or is needed to operate in business processes and use cases. Moreover, the existence of too many capabilities in products may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities in the product is important, and where they match your enterprise's requirements.

An effective customer relationship with a software provider is vital to the success of any investment. The overall customer experience and the full lifecycle of engagement play a key role in ensuring satisfaction and long-term success. Providers with dedicated customer leadership, such as chief customer officers, tend to invest more deeply in these relationships and prioritize customer outcomes to TCO and ROI expectations. It is equally important that this commitment to customer success is clearly demonstrated throughout the provider's website, buying process and customer journey.

Overall Scoring of Software Providers Across Categories

The research finds GE Vernova atop the list, followed by IFS and Oracle. Providers that place in the top three of a category earn the designation of Leader. Oracle and IFS has done so in five categories, GE Vernova in four and PTC in one category.

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the *x* and *y* axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have above median weighted performance to the axis in aggregate of the two product categories place farther to the right, while the performance and weighting for the Customer Experience category determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

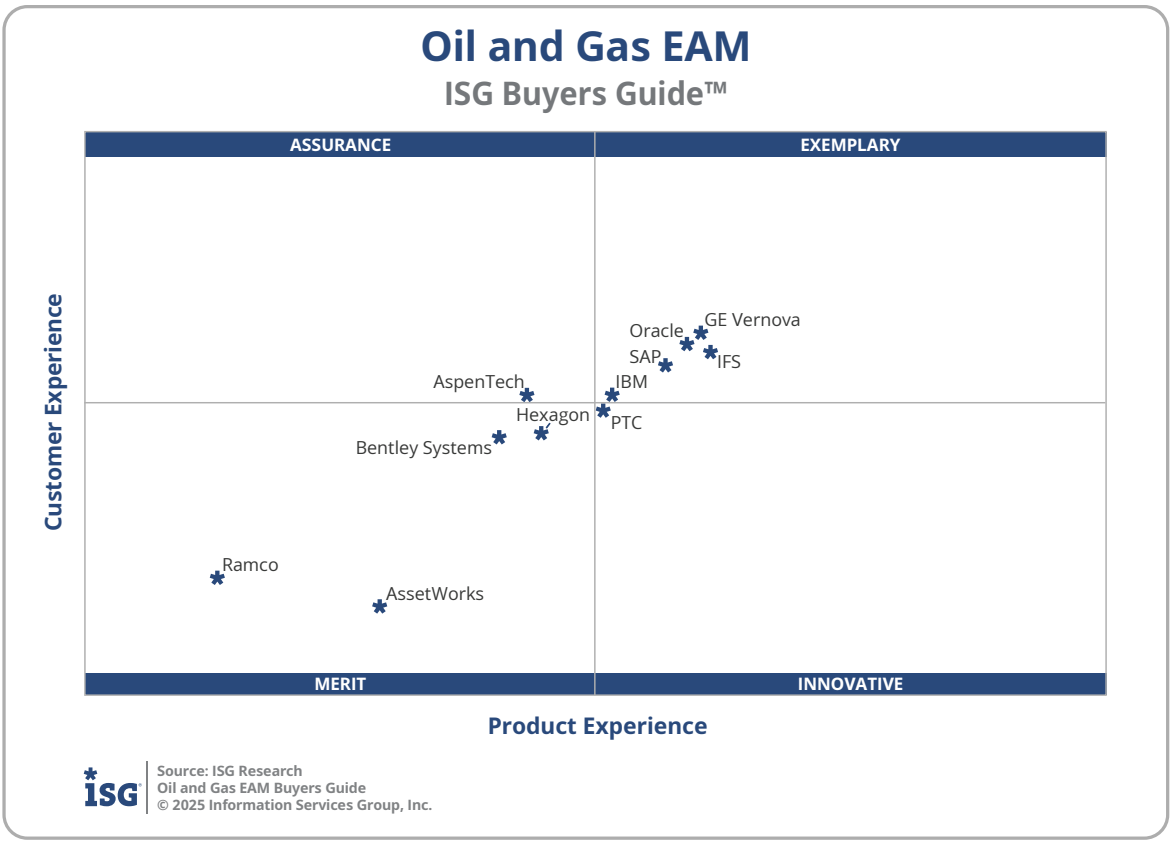
Oil and Gas EAM

Overall

Providers	Grade	Performance
GE Vernova	B++	Leader 79.6%
IFS	B++	Leader 79.4%
Oracle	B++	Leader 78.7%
SAP	B++	77.1%
IBM	B+	73.9%
PTC	B+	73.2%
AspenTech	B+	70.0%
Hexagon	B+	69.7%
Bentley Systems	B	67.8%
AssetWorks	B-	57.9%
Ramco	C++	51.3%

Source: ISG Research
Oil and Gas EAM Buyers Guide

The research categorizes and rates software providers into one of four categories: Assurance, Exemplary, Merit or Innovative. This representation of software providers' weighted performance in meeting the requirements in product and customer experience.



Exemplary: This rating (upper right) represents those that performed above median in Product and Customer Experience requirements. The providers rated Exemplary are: GE Vernova, IBM, IFS, Oracle and SAP.

Innovative: This rating (lower right) represents those that performed above median in Product Experience but not in Customer Experience. The provider rated Innovative is: PTC.

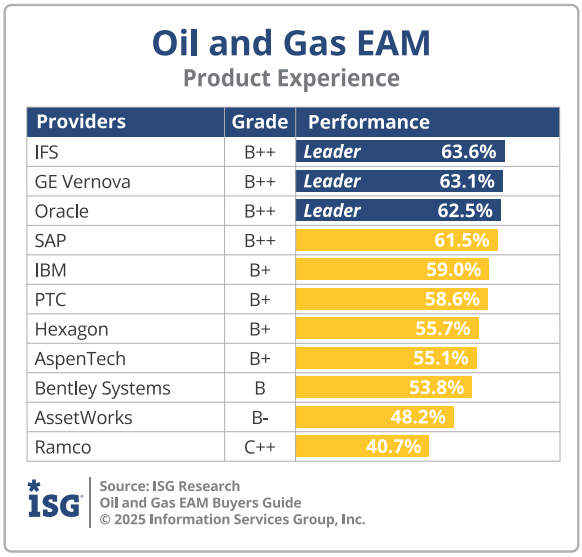
Assurance: This rating (upper left) represents those that performed above median in Customer Experience but not in Product Experience. The provider rated Assurance is: AspenTech.

Merit: This rating (lower left) represents those that did not surpass the median in Customer or Product Experience. The providers rated Merit are: AssetWorks, Bentley Systems, Hexagon and Ramco.

We advise enterprises to use this research as a supplement to their own evaluations, recognizing that ratings or rankings do not solely represent the value of a provider nor indicate universal suitability of a set of products.

Product Experience

The process of researching products to address an enterprise's needs should be comprehensive and evaluate specific capabilities and the underlying platform to the product experience. Our evaluation of the Product Experience examines the lifecycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future.



The research results in Product Experience are ranked at 80%, or four-fifths, using the underlying weighted performance. Importance was placed on the categories as follows: Capability (35%) and Platform (45%). IFS, GE Vernova and Oracle were designated Product Experience Leaders.

Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The evaluation of the Customer Experience and the entire lifecycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. The ISG Buyers Guide examines a software provider's customer commitment, viability, customer success, sales and onboarding, product roadmap and services with partners and support. The customer experience category also investigates the TCO/ROI and how well a software provider demonstrates the product's overall value, cost and benefits, including the tools and resources to evaluate these factors.

The research results in Customer Experience are ranked at 20%, or one-fifth of the 100% index, and represent the underlying provider validation and TCO/ROI requirements as they relate to the framework of commitment and value to the software provider-customer relationship.

The software providers that evaluated the highest in the Customer Experience category are GE Vernova, Oracle and IFS. These category leaders best communicate commitment and dedication to customer needs.

Oil and Gas EAM
Customer Experience

Providers	Grade	Performance
GE Vernova	A-	*Leader* 16.4%
Oracle	B++	*Leader* 16.1%
IFS	B++	*Leader* 15.9%
SAP	B++	15.6%
IBM	B+	14.9%
AspenTech	B+	14.8%
PTC	B+	14.7%
Hexagon	B+	14.0%
Bentley Systems	B+	13.9%
Ramco	C++	10.6%
AssetWorks	C+	9.9%

Source: ISG Research
Oil and Gas EAM Buyers Guide

Software providers that did not perform well in this category were unable to provide or make sufficient information readily available to demonstrate success or articulate their commitment to customer experience. The use of a software provider requires continuous investment, so a holistic evaluation must include examination of how they support their customer experience.

Software Provider Inclusion – Oil and Gas EAM

For inclusion in the ISG Buyers Guide™ for overall Oil and Gas EAM in 2025, a software provider must be in good standing financially and ethically, have at least $25 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents, and have at least 25 customers. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the past 12 months.

All software providers that offer relevant products and meet the inclusion requirements are invited to participate in the Buyers Guide evaluation process, at no cost to them. If a provider does not respond to or decline the invitation, a determination is made whether to include it in our analysis based on our defined set of inclusion criteria. These criteria are designed to ensure we include in our evaluation providers' geographic operations, customer base and revenue as well as all relevant aspects of the products' fit for the particular category being evaluated.

If a provider is actively marketing, selling and developing a product as reflected on its website that is within the scope of the Buyers Guide, it is automatically evaluated for inclusion. We have adopted this approach because we view it as our responsibility to assess all relevant providers whether or not they choose to actively participate.

Software providers with defined functionality are evaluated on the ability to offer a combination (if not all) of the following capabilities:

- Enterprise asset management or asset performance management (required)
  - Core asset management
  - Asset collaboration
  - Asset operations
- Access to digital twin
- Access to predictive maintenance

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer application suites or packages of products that may include relevant individual modules or applications.

Products Evaluated

Provider	Product Names	Version	Release Month/Year
AspenTech	APM, Aspen Mtell, OSI ADMS, OSI GMS	4.0 V15	May 2025
AssetWorks	AssetMAXX EAM	25.3	December 2025
Bentley Systems	AssetWise, iTwin, OpenPlant, OpenUtilities, PlantSight, SACS SPIDAstudio.	6.0 25.0.2 V3.0	October 2025 February 2025
GE Vernova	Asset Performance Management, APM Integrity Mobile, APM Rounds Pro, Autonomous Inspection, GridOS Field, GridOS Orchestration Software, GridOS Visual Intelligence, GridOS Geo Network Management, GridOS Data Fabric, Mobile Enterprise Suite, Proficy CSense, SmartSignal	V5.3.x 1.5.1	December 2025
Hexagon	HxGN APM, HxGN EAM, HxGN EAM Digital Work, HxGN SDx.	12.3	December 2025 November 2025 February 2025
IBM	Maximo Application Suite, Maximo Collaborate, Maximo Field Service Management, Maximo EAM, Maximo IoT, Maximo Manage, Maximo Mobile, Monitor and Health, Maximo Oil and Gas, Maximo Optimizer, Maximo Predict	9.2 8.0	November 2025
IFS	Cloud EAM, Copperleaf, Field Service Management, Ultimo EAM	25R2 24.4	November 2025 December 2024
Oracle	Fusion Cloud SCM, Fusion Field Service, IoT	26A 25.10	December 2025 November 2025 September 2025
PTC	ThingWorx Industrial IoT Platform, ThingWorx Analytics, ThingWorx Applications, ThingWorx Predictive, Maintenance, Service Board, ServiceMax AI, ServiceMax Core, ServiceMax FieldFX, ServiceMax Go, ServiceMax Asset 360 for Salesforce	10.0 25R2 / 25.2 13.0 4.0 12	December 2025

Ramco	EAM, ERP	N/A	December 2025
SAP	Intelligent Asset Management, Aset Performance Management, Field Service Management, S/4 HANA Cloud	2511	November 2025

Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the criteria for inclusion in this Buyers Guide. These are listed below as "Providers of Promise."

Provider	Product	Capability	Customers	Geography	Revenue
ABB	Ability Ellipse	No	Yes	Yes	Yes
CGI	OpenGrid EAM	No	Yes	Yes	Yes
eSmart Systems	Grid Vision	No	Yes	Yes	Yes
Fluentgrid	EAM	No	Yes	Yes	Yes
Hitachi Energy	Ellipse EAM, Asset Suite EAM	No	Yes	Yes	Yes
Mainpac	EAM	No	Yes	Yes	Yes
Microsoft	Dynamics 365 Supply Chain Management	No	Yes	Yes	Yes
Minsait	Utilities Plants EAM	No	Yes	Yes	Yes
Schneider Electric	AVEVA EAM	No	Yes	Yes	Yes
Siemens	EAM	No	Yes	Yes	Yes

Oil and Gas Field Service Management

The oil and gas industry relies on distributed infrastructure across upstream, midstream and downstream operations, requiring coordinated field service to maintain safety, reliability and productivity. Field service management (FSM) platforms support planning, scheduling, dispatch and technician enablement across remote well sites, pipeline networks, processing facilities, refineries and storage terminals. These capabilities help improve response times, reduce costs and strengthen operational continuity through better field visibility.

ISG Research defines field service management as software that supports work order management, scheduling and dispatch, mobile workforce enablement, labor and skills management, equipment data access, inventory coordination, real-time communication and remote expert support. When applicable, FSM also facilitates partner or customer interaction. These capabilities equip technicians across drilling and production, transportation and storage and downstream processing with the information necessary to execute fieldwork safely.

> **Field service demands are intensifying as wells mature, infrastructure expands, and facilities age.**

Field service demands are intensifying as wells mature, infrastructure expands, facilities age, regulatory expectations increase and experienced technicians retire. These pressures drive the need for advanced FSM platforms to improve reliability, reduce operational costs and support complex, interconnected operations. Newer systems combine AI, IoT data, cloud architectures, mobile tools and visualization technologies to support predictive maintenance, improve first-time fix rates, optimize scheduling and routing and enable effective remote assistance. This shift is shaping the future by delivering the intelligence required to meet rising expectations.

Enterprises evaluating FSM providers should prioritize platforms that simplify scheduling, streamline maintenance workflows and deliver measurable efficiency and cost gains through improved resource allocation and asset visibility. Today's offerings enhance service reliability through predictive insights and support sustainability initiatives by reducing truck rolls, lowering fuel use and enabling more efficient field operations. Selecting providers with these capabilities helps organizations strengthen field performance and improve safety.

The 2025 ISG Buyers Guide™ for Field Service Management evaluates 12 software providers in key areas that include mobile support, scheduling and dispatch optimization; work order and workforce management; access to assets, customer engagement, digital twins and predictive maintenance; platform support for analytics, data, devices, integration and knowledge management; and AI support and investment. This research evaluates the following providers: CGI, Comarch, GE Vernova, Hitachi Energy, IBM, IFS, Microsoft, Oracle, OverIT, PTC, Salesforce and SAP.

Key Takeaways

Oil and gas operators face increasing field service demands as infrastructure ages, environments become more complex and experienced technicians retire. Advanced field service platforms address these pressures by improving scheduling, strengthening technician enablement and enhancing real-time operational visibility across distributed assets. Organizations are turning to integrated, data-driven systems that reduce manual effort, support predictive maintenance and reinforce safety and compliance across diverse operating contexts. These shifts are shaping how enterprises evaluate platforms that improve reliability, efficiency and long-term operational resilience.

Software Provider Summary

The ISG Buyers Guide™ for Field Service Management evaluates 12 software providers that offer products supporting mobile field operations, scheduling and dispatch, workforce and work order management, digital twins, predictive maintenance and platform-level analytics, data, integration and AI capabilities. The research ranked the top three overall leaders as IFS, Oracle and GE Vernova. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. GE Vernova, IFS, Oracle, Salesforce and SAP were rated as Exemplary, with IBM rated as Innovative. CGI was rated as Assurance, and Comarch, Hitachi Energy, Microsoft, OverIT and PTC were rated as Merit.

Product Experience Insights

Product Experience, representing 80% of the evaluation, focuses on Capability (35%) and Platform (45%) and includes adaptability, manageability, reliability and usability. IFS, Oracle and SAP achieved the highest performance as Leaders in this category, supported by strong field service capability depth and resilient platform foundations that scale across varied operational environments. Leaders demonstrated enterprise-grade platform capabilities across varied roles and contexts.

Customer Experience Value

Customer Experience, which accounts for 20% of the evaluation, focuses on validation and TCO/ROI. GE Vernova, Oracle and IFS were the Leaders in this category, showing strong customer advocacy and clear investment in success outcomes. Providers with lower performance often lacked publicly available customer validation or failed to demonstrate structured ROI measurement and proactive lifecycle engagement.

Strategic Recommendations

Enterprises should focus on FSM platforms that streamline scheduling, strengthen technician enablement and provide predictive insights to improve reliability and reduce operational costs. Buyers should prioritize providers that combine AI-driven optimization, integrated mobile capabilities and scalable platform foundations to support safer, more efficient field operations. Software that reduces truck rolls, lowers fuel use and enhances visibility into field performance will support sustainability and operational resilience. Aligning provider capabilities with enterprise scale, asset distribution and compliance expectations will help organizations advance toward more efficient, data-driven field service environments.

The Findings – Oil and Gas Field Service Management

The software providers and products evaluated in the research provide product and customer experiences, but not everything offered is equally valuable to every enterprise or is needed to operate in business processes and use cases. Moreover, the existence of too many capabilities in products may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities in the product is important, and where they match your enterprise's requirements.

An effective customer relationship with a software provider is vital to the success of any investment. The overall customer experience and the full lifecycle of engagement play a key role in ensuring satisfaction and long-term success. Providers with dedicated customer leadership, such as chief customer officers, tend to invest more deeply in these relationships and prioritize customer outcomes to TCO and ROI expectations. It is equally important that this commitment to customer success is clearly demonstrated throughout the provider's website, buying process and customer journey.

Overall Scoring of Software Providers Across Categories

The research finds IFS atop the list, followed by Oracle and GE Vernova. Providers that place in the top three of a category earn the designation of Leader. IFS and Oracle have done so in five categories, GE Vernova in three and SAP in two categories.

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the *x* and *y* axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have above median weighted performance to the axis in aggregate of the two product categories place farther to the right, while the performance and weighting for the Customer Experience category determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

Oil and Gas Field Service
Overall

Providers	Grade	Performance
IFS	B++	*Leader* 80.3%
Oracle	B++	*Leader* 77.6%
GE Vernova	B++	*Leader* 77.1%
SAP	B++	76.7%
Salesforce	B+	74.7%
IBM	B+	73.5%
Hitachi Energy	B+	72.3%
PTC	B+	70.9%
Microsoft	B+	70.9%
CGI	B	63.7%
Comarch	B-	60.0%
OverIT	C++	56.3%

ISG
Source: ISG Research
Oil and Gas Field Service Buyers Guide
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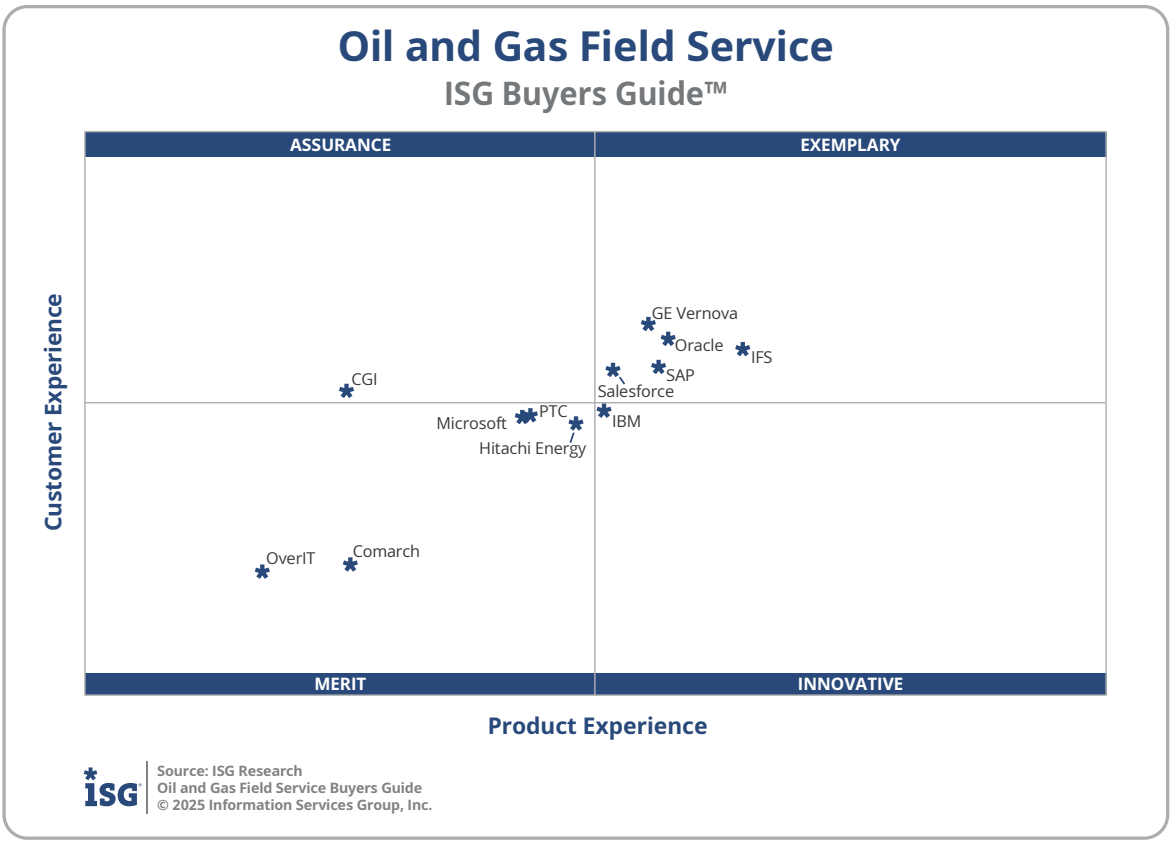
The research categorizes and rates software providers into one of four categories: Assurance, Exemplary, Merit or Innovative. This representation of software providers' weighted performance in meeting the requirements in product and customer experience.



Exemplary: This rating (upper right) represents those that performed above median in Product and Customer Experience requirements. The providers rated Exemplary are: GE Vernova, IFS, Oracle, Salesforce and SAP.

Innovative: This rating (lower right) represents those that performed above median in Product Experience but not in Customer Experience. The provider rated Innovative is: IBM.

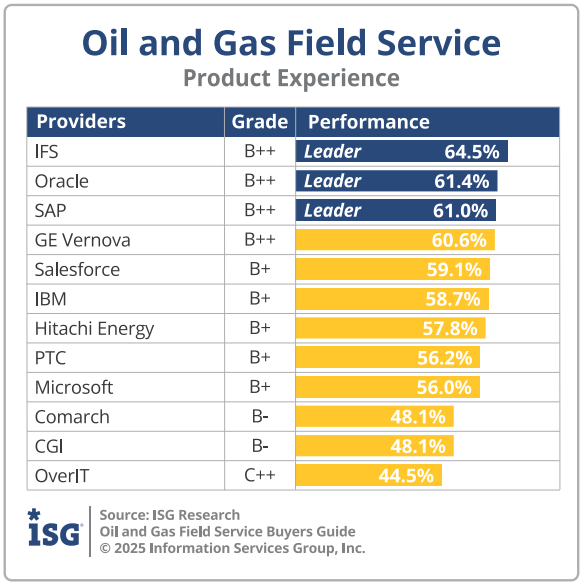
Assurance: This rating (upper left) represents those that performed above median in Customer Experience but not in Product Experience. The provider rated Assurance is: CGI.

Merit: This rating (lower left) represents those that did not surpass the median in Customer or Product Experience. The providers rated Merit are: Comarch, Hitachi Energy, Microsoft, OverIT and PTC.

We advise enterprises to use this research as a supplement to their own evaluations, recognizing that ratings or rankings do not solely represent the value of a provider nor indicate universal suitability of a set of products.

Product Experience

The process of researching products to address an enterprise's needs should be comprehensive and evaluate specific capabilities and the underlying platform to the product experience. Our evaluation of the Product Experience examines the lifecycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future.



The research results in Product Experience are ranked at 80%, or four-fifths, using the underlying weighted performance. Importance was placed on the categories as follows: Capability (35%) and Platform (45%). IFS, Oracle and SAP were designated Product Experience Leaders.

Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The evaluation of the Customer Experience and the entire lifecycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. The ISG Buyers Guide examines a software provider's customer commitment, viability, customer success, sales and onboarding, product roadmap and services with partners and support. The customer experience category also investigates the TCO/ROI and how well a software provider demonstrates the product's overall value, cost and benefits, including the tools and resources to evaluate these factors.

The research results in Customer Experience are ranked at 20%, or one-fifth of the 100% index, and represent the underlying provider validation and TCO/ROI requirements as they relate to the framework of commitment and value to the software provider-customer relationship.

The software providers that evaluated the highest in the Customer Experience category are GE Vernova, Oracle and IFS. These category leaders best communicate commitment and dedication to customer needs.

Oil and Gas Field Service

Customer Experience

Providers	Grade	Performance
GE Vernova	A-	*Leader* 16.4%
Oracle	B++	*Leader* 16.1%
IFS	B++	*Leader* 15.9%
SAP	B++	15.6%
Salesforce	B++	15.5%
CGI	B++	15.1%
IBM	B+	14.9%
PTC	B+	14.7%
Microsoft	B+	14.7%
Hitachi Energy	B+	14.5%
Comarch	B-	11.9%
OverIT	B-	11.7%

Source: ISG Research
Oil and Gas Field Service Buyers Guide

Software providers that did not perform well in this category were unable to provide or make sufficient information readily available to demonstrate success or articulate their commitment to customer experience. The use of a software provider requires continuous investment, so a holistic evaluation must include examination of how they support their customer experience.

Software Provider Inclusion – Oil and Gas Field Service

For inclusion in the ISG Buyers Guide™ for overall Oil and Gas Field Service in 2025, a software provider must be in good standing financially and ethically, have at least $25 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents, and have at least 25 customers. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the past 12 months.

All software providers that offer relevant products and meet the inclusion requirements are invited to participate in the Buyers Guide evaluation process, at no cost to them. If a provider does not respond to or decline the invitation, a determination is made whether to include it in our analysis based on our defined set of inclusion criteria. These criteria are designed to ensure we include in our evaluation providers' geographic operations, customer base and revenue as well as all relevant aspects of the products' fit for the particular category being evaluated.

If a provider is actively marketing, selling and developing a product as reflected on its website that is within the scope of the Buyers Guide, it is automatically evaluated for inclusion. We have adopted this approach because we view it as our responsibility to assess all relevant providers whether or not they choose to actively participate.

Software providers with defined functionality are evaluated on the ability to offer a combination (if not all) of the following capabilities:

- Field Service (required)
  - Mobile workforce management
  - Scheduling and dispatch optimization
  - Support for mobile applications
  - Work order management
- Access to customer engagement
- Access to enterprise asset management or asset performance management
- Access to digital twin
- Access to predictive maintenance

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer application suites or packages of products that may include relevant individual modules or applications.

Products Evaluated

Provider	Product Names	Version	Release Month/Year
CGI	Production Management Suite. OpenGrid Field	24.00	December 2025
Comarch	FSM	N/A	December 2025
GE Vernova	Asset Performance Management, APM Integrity Mobile, APM Rounds Pro, Autonomous Inspection, GridOS Field, GridOS Orchestration Software, GridOS Visual Intelligence, GridOS Geo Network Management, GridOS Data Fabric, Mobile Enterprise Suite, Proficy CSense, SmartSignal	V5.3.x 1.5.1	December 2025
Hitachi Energy	APM, Asset Suite EAM, Ellipse EAM, Energy Portfolio Management, eSOMS, IdentiQ, Lumada Asset and Work Management, Lumada FSM, MicroSCADA, Network Manager, Service Suite	N/A	December 2025
IBM	Maximo Application Suite, Maximo Collaborate, Maximo Field Service Management, Maximo EAM, Maximo IoT, Maximo Manage, Maximo Mobile, Monitor and Health, Maximo Oil and Gas, Maximo Optimizer, Maximo Predict	9.2 8.0	November 2025
IFS	Cloud EAM, Copperleaf, Field Service Management, Ultimo EAM	25R2 24.4	November 2025 December 2024
Microsoft	Azure Data Manager for Energy, Azure IoT, Cloud for Energy, Dynamics 365 Customer Service, Dynamics 365 Field Service, Dynamics 365 Supply Chain Management	2510 8.8.137.39 Release Wave 1	October 2025 November 2025 September 2025
Oracle	Fusion Cloud SCM, Fusion Field Service, IoT	26A 25.10	December 2025 November 2025 September 2025

OverIT	NextGen FSM, NextGen Field Collaboration, NextGen Geo	N/A	December 2025
PTC	ThingWorx Industrial IoT Platform, ThingWorx Analytics, ThingWorx Applications, ThingWorx Predictive, Maintenance, Service Board, ServiceMax AI, ServiceMax Core, ServiceMax FieldFX, ServiceMax Go, ServiceMax Asset 360 for Salesforce	10.0 25R2 / 25.2 13.0 4.0 12	December 2025
Salesforce	Asset Service Lifecycle Management, Field Service, Energy & Utilities Cloud	Winter 2026	October 2025
SAP	Intelligent Asset Management, Aset Performance Management, Field Service Management, S/4 HANA Cloud	2511	November 2025

Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the criteria for inclusion in this Buyers Guide. These are listed below as "Providers of Promise."

Provider	Product	Capability	Customers	Geography	Revenue
ABB	Maintenance and Field Services	No	Yes	Yes	Yes
AssetWorks	Field Service Solutions	No	Yes	Yes	Yes
Xerox	CareAR	No	Yes	Yes	Yes
Eaton	Electrical Power Distribution Field Services	No	Yes	Yes	Yes
Fluentgrid	Mobile Workforce Management	No	Yes	Yes	Yes
Ramco	EAM	No	Yes	Yes	Yes
ServicePower	Field Service Management Platform	No	Yes	Yes	Yes
Siemens	Field Service	No	Yes	Yes	Yes

Oil and Gas Predictive Maintenance

The oil and gas industry relies on complex, capital-intensive infrastructure that operates across upstream, midstream and downstream environments, requiring advanced maintenance strategies to support safety, reliability and productivity. Predictive maintenance platforms help operators monitor asset condition, anticipate failures and plan interventions that improve performance, reduce maintenance costs and support safer operations. With better visibility and streamlined processes, these platforms help maximize uptime and control costs across wells, pipelines, processing facilities and refineries.

> **Maintenance demands are intensifying as infrastructure ages and operating conditions grow more severe.**

ISG Research defines predictive maintenance as the application of data-driven insights, condition monitoring, analytics and machine learning to identify equipment degradation and schedule maintenance before failures occur. Predictive maintenance supports asset lifecycle management, maintenance and repair operations, labor and skills management, asset health monitoring and supply chain coordination. These capabilities help increase performance, extend asset life and reduce operational risk across exploration, production, transportation and processing activities.

Maintenance demands are intensifying as infrastructure ages, operating conditions grow more severe and experienced personnel retire, driving organizations to adopt predictive maintenance platforms that improve reliability, reduce costs and support interconnected operations. Newer systems combine AI, IoT data, cloud architectures and visualization technologies to detect early signs of failure, optimize maintenance schedules and support safer operations in high-risk environments such as offshore platforms, compressor stations and refining units. This shift is essential to meeting rising safety and operational expectations.

Enterprises evaluating predictive maintenance providers should prioritize platforms that streamline maintenance workflows, reduce manual effort and deliver measurable efficiency and cost gains through improved asset visibility and reduced downtime. Today's offerings enhance reliability with proactive insights and support sustainability by optimizing energy use, reducing unnecessary maintenance and minimizing impact. Selecting providers with these capabilities helps organizations strengthen operations and improve long-term performance.

The 2025 ISG Buyers Guide™ for Predictive Maintenance evaluates the following 14 software providers: AspenTech, Bentley Systems, Comarch, GE Vernova, Hexagon, Hitachi Energy, IBM, IFS, Microsoft, Oracle, PTC, Ramco, Salesforce and SAP.

Key Takeaways

Oil and gas operators face rising pressures as aging infrastructure, severe operating environments and workforce constraints increase the need for more proactive maintenance strategies. Predictive maintenance platforms address these challenges by using data, analytics and machine learning to anticipate failures, strengthen reliability and support safer, more efficient operations. Enterprises are increasingly adopting integrated systems that reduce manual effort, improve asset visibility and optimize maintenance planning across distributed environments. These dynamics are shaping how organizations evaluate technologies that enhance operational resilience, efficiency and long-term performance.

Software Provider Summary

The ISG Buyers Guide™ for Predictive Maintenance evaluates 14 software providers that offer products supporting predictive insights, digital twins, equipment monitoring, proactive service, field service integration and platform capabilities across analytics, data, devices, integration and AI. The research ranked the top three overall leaders as GE Vernova, IFS and Oracle. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. GE Vernova, IBM, IFS, Oracle and SAP were rated as Exemplary, with Hitachi Energy rated as Innovative. AspenTech and Salesforce were rated as Assurance; and Bentley Systems, Comarch, Hexagon, Microsoft, PTC and Ramco were rated as Merit.

Product Experience Insights

Product Experience, representing 80% of the evaluation, focuses on Capability (35%) and Platform (45%) and includes adaptability, manageability, reliability and usability. GE Vernova, IFS and Oracle achieved the highest performance as Leaders in this category, supported by the depth in predictive maintenance functionality and robust platform architectures that scale reliably across enterprise environments. Leaders demonstrated enterprise-grade platform capabilities across varied roles and contexts.

Customer Experience Value

Customer Experience, which accounts for 20% of the evaluation, focuses on validation and TCO/ROI. GE Vernova, Oracle and IFS were the Leaders in this category, showing strong customer advocacy and clear investment in success outcomes. Providers with lower performance often lacked publicly available customer validation or failed to demonstrate structured ROI measurement and proactive lifecycle engagement.

Strategic Recommendations

Enterprises should prioritize predictive maintenance platforms that deliver proactive insights, streamline maintenance workflows and reduce manual effort. Buyers should focus on providers that integrate AI, IoT data and scalable platform capabilities to strengthen reliability and safety. Solutions that minimize unnecessary maintenance and support energy and emissions optimization will enhance operational resilience. Aligning provider capabilities with asset complexity and regulatory demands helps organizations advance more efficient, data-driven maintenance practices.

The Findings – Oil and Gas Predictive Maintenance

The software providers and products evaluated in the research provide product and customer experiences, but not everything offered is equally valuable to every enterprise or is needed to operate in business processes and use cases. Moreover, the existence of too many capabilities in products may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities in the product is important, and where they match your enterprise's requirements.

An effective customer relationship with a software provider is vital to the success of any investment. The overall customer experience and the full lifecycle of engagement play a key role in ensuring satisfaction and long-term success. Providers with dedicated customer leadership, such as chief customer officers, tend to invest more deeply in these relationships and prioritize customer outcomes to TCO and ROI expectations. It is equally important that this commitment to customer success is clearly demonstrated throughout the provider's website, buying process and customer journey.

Overall Scoring of Software Providers Across Categories

The research finds GE Vernova atop the list, followed by IFS, and Oracle. Providers that place in the top three of a category earn the designation of Leader. GE Vernova, IFS, and Oracle have done so in five categories.

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the *x* and *y* axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have above median weighted performance to the axis in aggregate of the two product categories place farther to the right, while the performance and weighting for the Customer Experience category determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

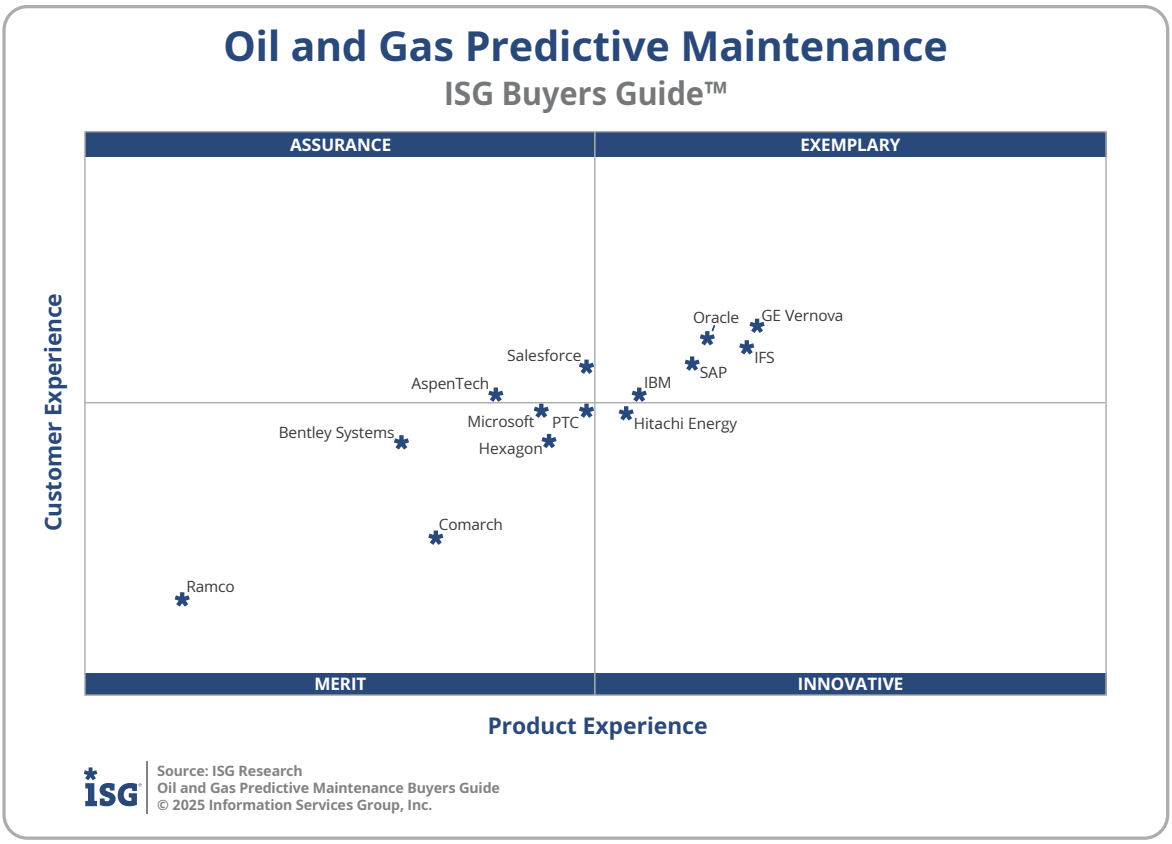
Oil & Gas Predictive Maintenance

Overall

Providers	Grade	Performance
GE Vernova	B++	*Leader* 80.6%
IFS	B++	*Leader* 79.7%
Oracle	B++	*Leader* 78.2%
SAP	B++	77.0%
IBM	B+	73.8%
Hitachi Energy	B+	72.8%
Salesforce	B+	72.6%
PTC	B+	71.4%
Microsoft	B+	69.9%
Hexagon	B+	69.2%
AspenTech	B	68.2%
Bentley Systems	B-	62.4%
Comarch	B-	61.5%
Ramco	C+	49.0%

Source: ISG Research
Oil and Gas Predictive Maintenance Buyers Guide

The research categorizes and rates software providers into one of four categories: Assurance, Exemplary, Merit or Innovative. This representation of software providers' weighted performance in meeting the requirements in product and customer experience.



Exemplary: This rating (upper right) represents those that performed above median in Product and Customer Experience requirements. The providers rated Exemplary are: GE Vernova, IBM, IFS, Oracle, and SAP.

Innovative: This rating (lower right) represents those that performed above median in Product Experience but not in Customer Experience. The provider rated Innovative is: Hitachi Energy.

Assurance: This rating (upper left) represents those that performed above median in Customer Experience but not in Product Experience. The providers rated Assurance are: AspenTech and Salesforce.

Merit: This rating (lower left) represents those that did not surpass the median in Customer or Product Experience. The providers rated Merit are: Bentley Systems, Comarch, Hexagon, Microsoft, PTC, and Ramco.

We advise enterprises to use this research as a supplement to their own evaluations, recognizing that ratings or rankings do not solely represent the value of a provider nor indicate universal suitability of a set of products.

Product Experience

The process of researching products to address an enterprise's needs should be comprehensive and evaluate specific capabilities and the underlying platform to the product experience. Our evaluation of the Product Experience examines the lifecycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future.

Oil & Gas Predictive Maintenance
Product Experience

Providers	Grade	Performance
GE Vernova	B++	*Leader* 64.2%
IFS	B++	*Leader* 63.8%
Oracle	B++	*Leader* 62.0%
SAP	B++	61.4%
IBM	B+	58.9%
Hitachi Energy	B+	58.3%
Salesforce	B+	56.9%
PTC	B+	56.7%
Hexagon	B+	55.3%
Microsoft	B+	55.0%
AspenTech	B	53.1%
Comarch	B-	49.7%
Bentley Systems	B-	48.2%
Ramco	C+	38.2%

Source: ISG Research
Oil and Gas Predictive Maintenance Buyers Guide

The research results in Product Experience are ranked at 80%, or four-fifths, using the underlying weighted performance. Importance was placed on the categories as follows: Capability (35%) and Platform (45%). GE Vernova, IFS, and Oracle were designated Product Experience Leaders.

Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The evaluation of the Customer Experience and the entire lifecycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. The ISG Buyers Guide examines a software provider's customer commitment, viability, customer success, sales and onboarding, product roadmap and services with partners and support. The customer experience category also investigates the TCO/ROI and how well a software provider demonstrates the product's overall value, cost and benefits, including the tools and resources to evaluate these factors.

The research results in Customer Experience are ranked at 20%, or one-fifth of the 100% index, and represent the underlying provider validation and TCO/ROI requirements as they relate to the framework of commitment and value to the software provider-customer relationship.

The software providers that evaluated the highest in the Customer Experience category are GE Vernova, Oracle, and IFS. These category leaders best communicate commitment and dedication to customer needs.

Oil & Gas Predictive Maintenance

Customer Experience

Providers	Grade	Performance
GE Vernova	A-	*Leader* 16.4%
Oracle	B++	*Leader* 16.1%
IFS	B++	*Leader* 15.9%
SAP	B++	15.6%
Salesforce	B++	15.5%
IBM	B+	14.9%
AspenTech	B+	14.8%
PTC	B+	14.7%
Microsoft	B+	14.7%
Hitachi Energy	B+	14.5%
Hexagon	B+	14.0%
Bentley Systems	B+	13.9%
Comarch	B-	11.9%
Ramco	C++	10.6%

Source: ISG Research
Oil and Gas Predictive Maintenance Buyers Guide

Software providers that did not perform well in this category were unable to provide or make sufficient information readily available to demonstrate success or articulate their commitment to customer experience. The use of a software provider requires continuous investment, so a holistic evaluation must include examination of how they support their customer experience.

Software Provider Inclusion – Oil and Gas Predictive Maintenance

For inclusion in the ISG Buyers Guide™ for overall Oil and Gas Predictive Maintenance in 2025, a software provider must be in good standing financially and ethically, have at least $25 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents, and have at least 25 customers. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the past 12 months.

All software providers that offer relevant products and meet the inclusion requirements are invited to participate in the Buyers Guide evaluation process, at no cost to them. If a provider does not respond to or decline the invitation, a determination is made whether to include it in our analysis based on our defined set of inclusion criteria. These criteria are designed to ensure we include in our evaluation providers' geographic operations, customer base and revenue as well as all relevant aspects of the products' fit for the particular category being evaluated.

If a provider is actively marketing, selling and developing a product as reflected on its website that is within the scope of the Buyers Guide, it is automatically evaluated for inclusion. We have adopted this approach because we view it as our responsibility to assess all relevant providers whether or not they choose to actively participate.

Software providers with defined functionality are evaluated on the ability to offer a combination (if not all) of the following capabilities:

- Predictive maintenance (required)
    - Proactive service
- Access to digital twin
- Access to enterprise asset management or asset performance management
- Access to field service

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer application suites or packages of products that may include relevant individual modules or applications.

Products Evaluated

Provider	Product Names	Version	Release Month/Year
AspenTech	APM, Aspen Mtell, OSI ADMS, OSI GMS	4.0 V15	May 2025
Bentley Systems	AssetWise, iTwin, OpenPlant, OpenUtilities, PlantSight, SACS SPIDAstudio.	6.0 25.0.2 V3.0	October 2025 February 2025
Comarch	FSM	N/A	December 2025
GE Vernova	Asset Performance Management, APM Integrity Mobile, APM Rounds Pro, Autonomous Inspection, GridOS Field, GridOS Orchestration Software, GridOS Visual Intelligence, GridOS Geo Network Management, GridOS Data Fabric, Mobile Enterprise Suite, Proficy CSense, SmartSignal	V5.3.x 1.5.1	December 2025
Hexagon	HxGN APM, HxGN EAM, HxGN EAM Digital Work, HxGN SDx.	12.3	December 2025, November 2025, February 2025
Hitachi Energy	APM, Asset Suite EAM, Ellipse EAM, Energy Portfolio Management, eSOMS, Lumada Asset and Work Management, Network Manager, Network SCADA and GMS, Service Suite.	N/A	December 2025
IBM	Maximo Application Suite, Maximo Collaborate, Maximo Field Service Management, Maximo EAM, Maximo IoT, Maximo Manage, Maximo Mobile, Monitor and Health, Maximo Oil and Gas, Maximo Optimizer, Maximo Predict	9.2 8.0	November 2025
IFS	Cloud EAM, Copperleaf, Field Service Management, Ultimo EAM	25R2 24.4	November 2025 December 2024
Microsoft	Azure Data Manager for Energy, Azure IoT, Cloud for Energy, Dynamics 365 Customer Service, Dynamics 365 Field Service, Dynamics	2510 8.8.137.39 Release Wave 1	October 2025 November 2025 September 2025

	365 Supply Chain Management		
Oracle	Fusion Cloud SCM, Fusion Field Service, IoT	26A 25.10	December 2025 November 2025 September 2025
PTC	ThingWorx Industrial IoT Platform, ThingWorx Analytics, ThingWorx Applications, ThingWorx Predictive, Maintenance, Service Board, ServiceMax AI, ServiceMax Core, ServiceMax FieldFX, ServiceMax Go, ServiceMax Asset 360 for Salesforce	10.0 25R2 / 25.2 13.0 4.0 12	December 2025
Ramco	EAM, ERP	N/A	December 2025
Salesforce	Asset Service Lifecycle Management, Field Service, Energy & Utilities Cloud	Winter 2026	October 2025
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Provider	Product	Capability	Customers	Geography	Revenue
ABB	Ability Predictive Maintenance	No	Yes	Yes	Yes
CGI	OpenGrid Work & Asset	No	Yes	Yes	Yes
Eaton	PredictPulse	No	Yes	Yes	Yes
ETAP	eAPM	No	Yes	Yes	Yes
OverIT	NextGen FSM, NextGen Field Collaboration, NextGen Geo	No	Yes	Yes	Yes
Schneider Electric	EcoStruxture	No	Yes	Yes	Yes
Siemens	Energy Predictive Maintenance	No	Yes	Yes	Yes

About ISG Software Research and Advisory

ISG Software Research and Advisory provides market research and coverage of the technology industry, informing enterprises, software and service providers, and investment firms. The ISG Buyers Guides provide insight on software categories and providers that can be used in the RFI/RFP process to assess, evaluate and select software providers.

About ISG Research

ISG Research provides subscription research, advisory, consulting and executive event services focused on market trends and disruptive technologies. ISG Research delivers guidance that helps businesses accelerate growth and create more value. For further information about ISG Research subscriptions, please visit research.isg-one.com.

About ISG

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth. The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.