



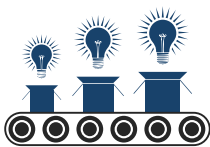
## U.S. B2B ECOMMERCE PLATFORM MARKET

The competitive landscape map presents the relative positioning of vendor participants in terms of their current market share and strategic positioning for future growth. The following factors were considered while constructing this landscape:

- Current market penetration. The vendor's current level of deployment is reflected on the X axis.
- Relative strategic excellence is shown on the Y axis. The higher a vendor's strategy score, the more likely it to outperform the market and win market share from adjacent competitors. **Factors include:**



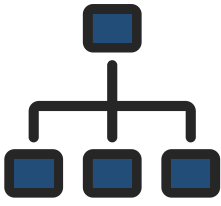
**True B2B:** Though the future of B2B is bright, B2C is the focus of many vendors in this space. Some take a B2C solution and create add-ons or application programming interfaces (APIs) to accommodate B2B. Since B2B is very complex and involved, companies were scored on their offering for B2B either as a straight solution, or a close match with their updated B2C solution.



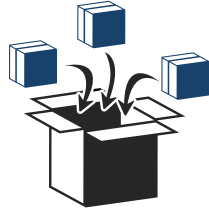
**Product Line Depth:** As the B2B business models change to a more customer-focused and digital solution, B2B organizations must invest in their online presence. In addition to the core eCommerce component of the system, companies who offered additional components, such as native CRM, CMS, and marketing tools, scored high in this factor.



**Total Cost of Ownership (TCO):** Traditional methods of B2B commerce involved costly investments into software, labor, and time. B2B organizations look for solutions that will transform their CAPEX to OPEX with software-based solutions that tie the back end systems to the front-end. B2B eCommerce platform solutions that had a lower TCO or different solution types at different price points scored higher on this factor.



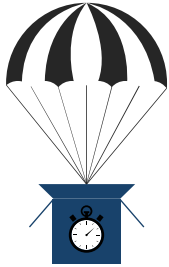
**Workflow Engine:** B2B eCommerce workflows are complicated and deeply involved with multiple points of contact, pricing options, product configurations, and order management. Therefore, the ability to customize and create new workflows quickly and efficiently within the platform is a strong competitive factor. Providers who had not just built-in workflow capabilities but allowed for more complex workflows without extending into additional systems or processes scored high on this factor.



**Product Attributes:** In the goal to be more customer-focused and similar to a B2C experience, B2B platforms need to have quality attributes that customers want, such as enhanced product details, guided navigation, faceted and on-site search, request for quote, and configure-price-quote (CPQ). These attributes make up important self-service method which is a driver in the market. Companies who provide some or most of these features scored high in this factor.



**User interface:** B2B customers desire a system with a clean, intuitive user interface in all formats, including mobile and desktop on both the front-end users, and the back end organization. Additionally, though the B2B model proves complex, successful platforms enable easy navigation and usability that requires little to no training time for the user. With a great user interface on both the back and front-end the eCommerce solution cuts costs, time, training, and unnecessary problems. Providers who produced an attractive and easy-to-use interface, e.g., drag-and-drop features, easy access, for the back end, and customizable and clean templates or setup for the front-end scored high in this factor.



**Deployment time:** With more outlets to customers, the technology stack in a B2B environment expands, and so does the need for seamless and quick integrations between systems. Some deployments can take from eight weeks to six months depending on vendors and partners, as well as the level of complexities and integrations a B2B organization needs. While this factor has a range of possibilities, companies who provided a solution that had a quick deployment time or a starter product that serves as the main solution while more work can be done without interrupting the B2B organization's schedule scored higher in this factor.

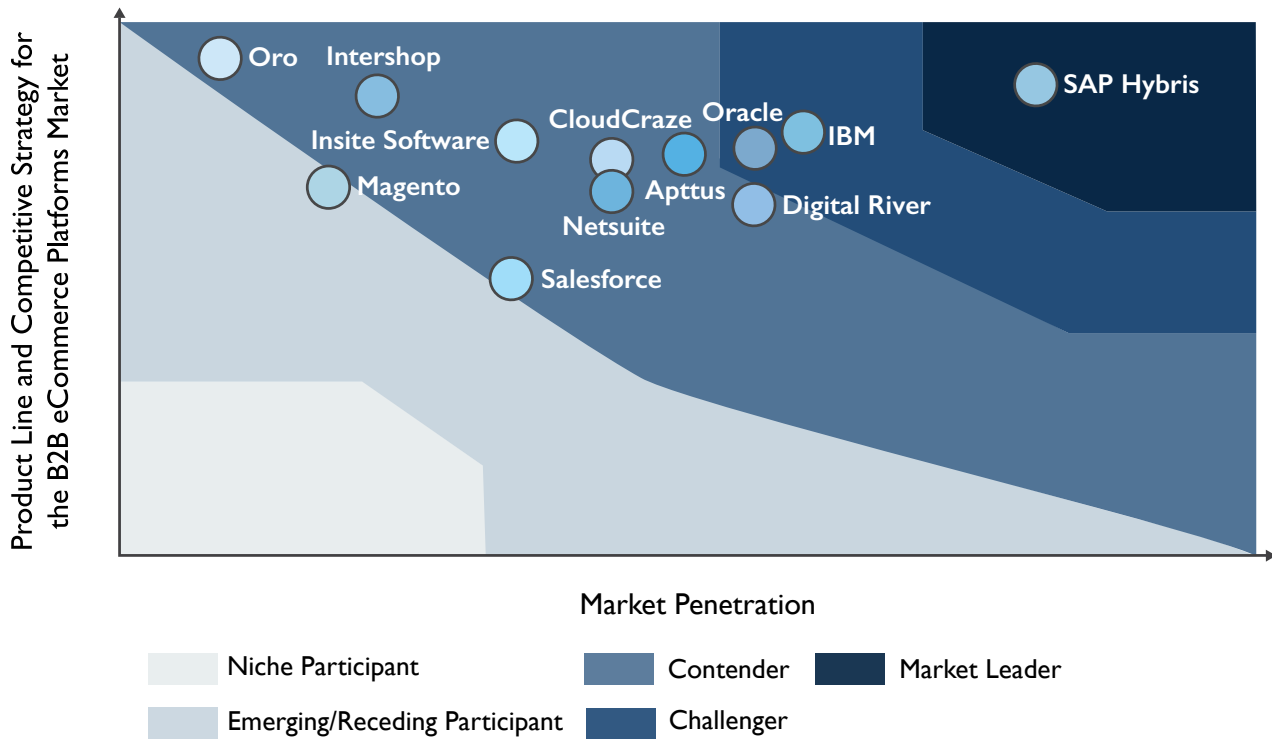


**System integrators (SI) and partner ecosystem:** Due to the complex nature of B2B systems, SIs and implementation partners are fundamental in a B2B eCommerce platform setup. SIs and partners must be well-versed or experts in the B2B space, with the strategies and tools to integrate all components of the ERP, PIM, CRM, CMS, and so on for a seamless solution. Furthermore, partners and SIs are typically the communication channel between B2B organizations and vendors and assist with bugs, upgrades, and requests. Companies who have established partner and SI ecosystems with good track records and expertise scored higher in this factor.

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**Key Takeaway:** This B2B eCommerce platform analysis looked at two sets of criteria: market penetration on the x-axis, and product capabilities on the y-axis. SAP Hybris scored the highest overall ranking, with top positions on both dimensions. Just in terms of product attributes, our research reviewed a number of areas including true B2B capabilities, product line depth, total cost of ownership, and each platform's system workflows; in these areas, Oro ranked the highest.

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Source: Frost & Sullivan

## COMPETITIVE ANALYSIS

### SAP Hybris

**Company:** SAP Hybris - Market leader for B2B eCommerce platforms in the U.S. (2016)

**Founded:** 1997

**Type:** B2C and B2B

#### Highlights:

Company has strong presence in the overall commerce space. SAP Hybris joined software powerhouse SAP in 2013. SAP Hybris' core functionality includes enterprise-grade commerce, order management and a cloud-based product management system.

#### Platform Capabilities:

Offers a strong, back-office system integration for SAP ERP or SAP S/4HANA, as well as offering flexible integration capabilities with other ERP and back-office systems.

Works well with most CRM vendors and connects them successfully to back end systems for analytics and reporting, promotions, and marketing campaigns.

Serves businesses in many verticals, such as retail, consumer products and wholesale manufacturing, telecommunications, digital and software services and automotive.

Powers over 150 B2B mid-size and enterprise customers; top-tier clients include Cintas Corporation, Grainger, and Medtronic.

Gives customers a pre-built storefront to start called B2B Accelerator, minimizing store downtime and accelerating their go-to-market strategy. The entire system contains all front-end and back end components, with intuitive user interfaces and a device-agnostic system for the B2B organization.

Provides front-end advanced merchandizing tools with predictive text, keywords, and misspelling navigation.

SAP Hybris' workflows and adjustable business rules enable an omni-channel and self-service based experience for end customers.

Relies heavily on world-class system integrators and partners who do the entire implementation and integrations for the customer, ranging from eight weeks to six months, depending on complexity.

**Prediction:** SAP is expected to maintain market share leadership through the forecasted years though it will get increasingly challenging as more challengers and contenders move up and offer more B2B eCommerce solutions.



## IBM Commerce

**Company:** IBM Watson Commerce – Second in the market behind SAP for B2B eCommerce platforms

**Founded:** 2010

**Type:** B2B

### Highlights:

Company is one of the first providers to build a commercial eCommerce platform IBM Watson Commerce is the amalgamation of Watson Commerce, Websphere and Sterling Commerce IBM's B2B eCommerce solutions is comprised of:

- Watson Commerce for catalog management, price lists and promotions, in addition to Watson Marketing, which provides marketing tools such as A/B testing
- Websphere for post-sale movement of orders to the system of record, as well as core shopping cart capabilities, mobile compatibility and SKU
- Sterling for the order management component and CPQ

### Platform Capabilities:

All software components operate under one brand for IBM.

Includes the Sterling B2B integrator, which helps B2B organizations link all their channels to the same system.

Gives all customers choices in deployment, localization and competitive pricing.

**Prediction:** IBM's product line strategy of powerful components and customer-choice will serve the company well the market but the company will also face pressure on maintaining market share due to rising competition.

### Oracle Commerce Cloud

**Company:** Oracle Commerce Cloud – Another challenger in the B2B eCommerce space focused on mid-market organizations

**Founded:** 2015

**Type:** B2C and B2B

#### **Highlights:**

Much like IBM, Oracle has leveraged its expertise within the software space to create Oracle Commerce Cloud as a part of a connected suite of apps such as CPQ Cloud, Marketing Cloud and Business Cloud. The solution was built on ATG and Endeca technologies that have driven top retailers eCommerce experiences for many years.



#### **Platform Capabilities:**

Features a REST API for easy deposit and withdrawal of data and native integration with CPQ tools.

Offers deployment flexibility as an on-premises solution; deployment ranges from 12-14 weeks

Provides tight integrations with Oracle's CX stack for greater customer engagement

Offers an arsenal of implementation partners who are experienced in both on-premises implementations and service cloud.

**Prediction:** Similar to IBM, Oracle is also well-positioned due to its strong reputation for both B2B and B2C capabilities. However, Oracle too, will need to up the ante to maintain its market share amid rising competition.





## OroCommerce

**Company:** OroCommerce – New vendor that has emerged with an impressive eCommerce product suite making it a contender straight out of the gate

**Founded:** 2012

**Type:** B2B

**Highlights:**

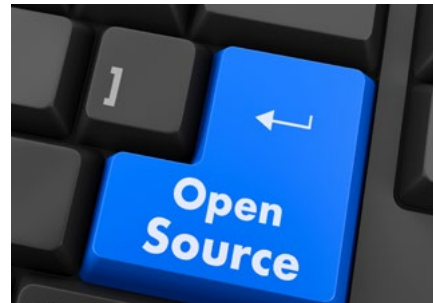
OroCommerce offers a true B2B platform with a robust out-of-the-box workflow engine designed to streamline complex back-end and front-end capabilities for seamless customer interactions. Oro has a key advantage through its existing CRM capabilities and provides a well integrated component for its open-sourced platform.

**Platform Capabilities:**

Eliminates complex integrations

Boasts over 150,000 active installations of CRM and commerce customer, which gives the company a strategic global footprint that is also a great launching pad for attracting new clients.

**Prediction:** Frost & Sullivan feels bullish about Oro's market prospects because of its strong focus towards a very robust product strategy. As it continues its market outreach, through continued capitalization on this value proposition, Oro stands to gain tremendously over the forecast period and could gain enough momentum to become a challenger.



## Intershop Commerce Suite

**Company:** Intershop Commerce Suite – Strong contender in the eCommerce space, especially in EMEA

**Founded:** 1994

**Type:** B2B

**Highlights:**

Intershop has a complete, all-in-one, B2B eCommerce solution. The company was one of the first to build a commercial commerce platform.

**Platform Capabilities:**

Offers multiple deployment options from cloud and on-premises to managed service deployments

Focuses on mid-sized to larger companies with a mid-range TCO

**Prediction:** As it expands more into the U.S., Intershop is expected to continue to be a strong contender in this space as it gains more customers in new markets.

### Insite Software

**Company:** Insite Software – Another contender with a true B2B solution that has a lower TCO than most solutions.

**Founded:** 2004

**Type:** B2B

**Highlights:**

Intershop has a complete, all-in-one, B2B eCommerce solution. The company was one of the first to build a commercial commerce platform. Insite's solution, InsiteCommerce®, which connects to a customer's back end systems through InsiteConnect®, is an API-first product. The company boasts clients like Honeywell and Garret, relying heavily on its three types of partners to implement and maintain the solution for customers.

**Platform Capabilities:**

Has transitioned from a license and maintenance model to an SaaS model, which has a lower TOC, however, companies can pay more as they scale up with the solution

**Prediction:** Insite has an extremely loyal customer base and a very good price-performance that will help it remain competitive within the market.

### Apttus

**Company:** Apttus – Among a number of contenders within the B2B eCommerce platform market known for its CPQ and Quote-to-Cash solution.

**Founded:** 2006

**Type:** B2C and B2B

**Highlights:**

Apttus' main product is Apttus E-Commerce with a PIM, OMS, CPQ and other storefront and back end management systems that are available for B2C, B2B and B2B2B/C. The company also created Max, a virtual assistant for their Quote-to-Cash software.

**Platform Capabilities:**

Built on Microsoft Azure and Salesforce, enabling greater scalability, mobile support, multiple languages and currencies.

Provides key automation capabilities such as product management, revenue recognition, order orchestration, and billing

Offers excellent support with 25 system integrators and over 1,000 consultants trained on its systems through Apttus University.

**Prediction:** Apttus' development in artificial intelligence makes it a strong acquisition target and the company is expected to remain a strong contender due to its steady revenue stream and stable market presence.



## CloudCraze

**Company:** CloudCraze

**Founded:** 2009

**Type:** B2B

**Highlights:**

CloudCraze is built natively on Salesforce and provides an out-of-the-box B2B solution with Salesforce CRM and a commerce component together. The company participates within three major customer categories, such as consumer products (Coca-Cola), manufacturing and distribution (Johnson Controls), and software and services companies (Avid and Kaplan).

**Platform Capabilities:**

Offers localized and global partners for implementation and a pay-as-you-go model

Comes mobile-ready and with a full suite of reporting and analytics tools

Easy to implement with REST and Salesforce global APIs and includes numerous add-ons within the private AppExchange

**Prediction:** As more B2B organizations invest in B2B eCommerce platforms, CloudCraze is targeting customers/prospects within the Salesforce ecosystem and hopes to capitalize on the continued growth of Salesforce business.

## Netsuite

**Company:** Netsuite

**Founded:** 1998 (Acquired by Oracle in 2016)

**Type:** B2B

**Highlights:**

Originally an ERP solution, Netsuite created SuiteCommerce for an enterprise-grade B2B solution built for a B2C experience.

**Platform Capabilities:**

Features good integrations with back end systems like OMS, ERP, and CRM

Works across all channels, including warehouses, brick and mortar stores, and channel-partners

Enables real-time interaction with customers from anywhere and is mobile compatible

**Prediction:** Going forward, Netsuite's market presence will depend on how Oracle would plan to make it an integral part of the Oracle Commerce Cloud.

## Digital River

**Company:** Digital River

**Founded:** 1994

**Type:** B2C and B2B

**Highlights:**

Digital River is another contender with WCMS, PIM, CPQ, and DAM built in a multi-tenant SaaS solution.

**Platform Capabilities:**

Provides primarily revenue share or per-transaction models, so there are no subscription fees



Offers a large payment ecosystem, with over 200 global bank connections and 40 payment types, which is protected with fraud prevention and risk management toolsets

**Prediction:** While traditionally B2C focused in software and gaming, Digital River applies the same tactics to giving a B2C-like experience to B2B customers with automated processes and a pristine payment system. Digital River's ability to rise in the market would be highly dependent on its ability to parlay its success in the B2C space to its B2B initiatives.

## Magento

**Company:** Magento

**Founded:** 2008

**Type:** B2B

### **Highlights:**

Magento is a long-time participant within the B2B eCommerce platform market based off its solution for B2C. It also has a healthy partner ecosystem with over 270 solution partners.

### **Platform Capabilities:**

Features a competent analytics and business intelligence platform called Magento Business Intelligence, which employs Google and website analytics

**Prediction:** Magento is a well-established vendor of B2B eCommerce solutions and has a strong pedigree. However, competitive forces and new entrants are also forcing Magento to constantly revisit end-user requirements to innovate and stay competitive.

## Salesforce Commerce Cloud

**Company:** Salesforce Commerce Cloud

**Founded:** 2016

**Type:** B2B

### **Highlights:**

Salesforce Commerce Cloud, formerly Demandware, was rebranded shortly after joining Salesforce in 2016. Large brands like Godiva use Salesforce Commerce Cloud for its B2B interactions.

### **Platform Capabilities:**

Harnesses the power of Salesforce and is natively built on the Salesforce Cloud

**Prediction:** With Salesforce's renewed focus on B2C as well as a partner ecosystem that includes companies like CloudCraze, Frost & Sullivan expects Salesforce to become an enabler of B2B eCommerce solutions as opposed to being an actual vendor.