IDC MarketScape: Worldwide B2B Digital Commerce Platforms 2020 Vendor Assessment
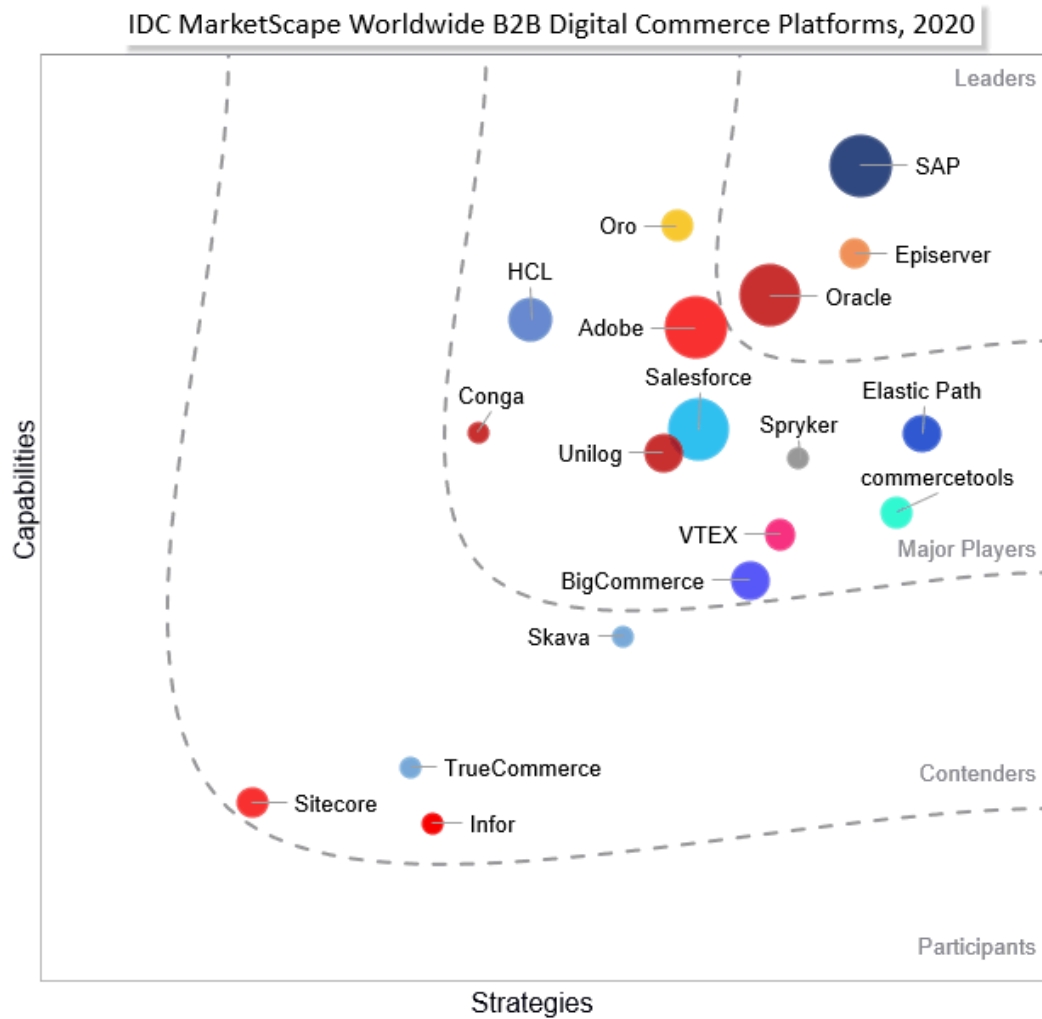
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IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide B2B Digital Commerce Platforms Vendor Assessment

IDC MarketScape Worldwide B2B Digital Commerce Platforms, 2020

Source: IDC, 2020

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

IDC OPINION

B2B Sellers Embrace Digital Commerce Out of Necessity

Over the past five years, business-to-business (B2B) digital commerce platforms have undergone a rapid transformation as B2B buyers demand better commerce experiences. Once overlooked in favor of consumer-driven ecommerce, B2B organizations have undergone digital transformation endeavors to offer self-service buying channels online. The COVID-19 crisis has accelerated this change, making digital commerce the number one priority for many merchants overnight whose typical channels to market were disrupted. Commerce projects that might have been planned for the next two or three years were moved to the top of the queue so that manufacturers, distributors, and brands could thrive. In this dynamic market, where past success no longer ensures future viability, B2B sellers must deliver unique and engaging commerce experiences that suit their customers' specific business models. At the same time, B2B organizations must remove friction from customer engagements and be able to quickly iterate their business models if they wish to effectively respond to market changes.

IDC has seen cloud take the digital commerce software market by storm over the past few years, with applications deployed in the public cloud accounting for 55.7% of the entire market in 2019 (see *Worldwide Digital Commerce Applications Market Shares, 2019: Headless Commerce Goes Mainstream,* IDC #US45243220, June 2020). While B2C digital commerce platforms have truly embraced multitenant SaaS, most B2B technology buyers are still demanding single-tenant or hybrid cloud deployments that allow deep customizations to support B2B complexities. Still, IDC expects the market to continue to shift toward the public cloud over the coming years. COVID-19 has accelerated this shift.

This IDC MarketScape looks specifically at vendors providing digital commerce platforms that satisfy B2B commerce requirements. IDC simultaneously conducted a vendor evaluation on B2C digital commerce platforms to best assist technology buyers of both models. We will also be publishing an IDC MarketScape on headless digital commerce platforms in the fourth quarter of 2020.
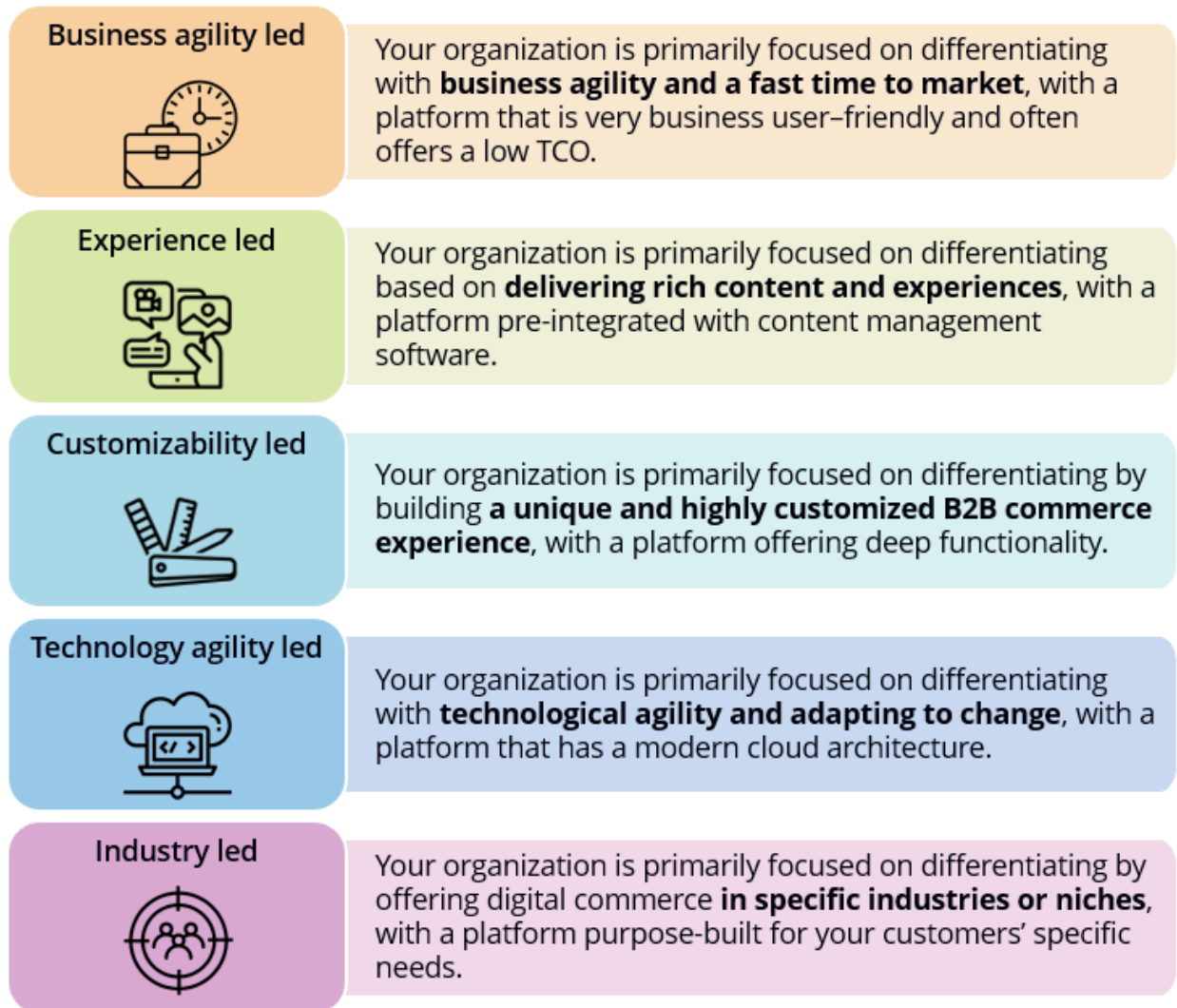
Areas of Differentiation for B2B Sellers

B2B customer references we spoke with expressed that the vendor selection process is no picnic. IDC tracks over 100 vendors specifically for digital commerce software, many of whom use similar market messages to sell their applications. There is a myriad of different factors at play when selecting a platform. One method IDC advocates is for every technology buyer to reflect on how they intend to use a B2B digital commerce platform to differentiate in their market. Figure 2 depicts five of the most common areas IDC sees merchants attempting to differentiate in the digital commerce market.

IDC has found that these are currently the most common areas of differentiation, leading technology buyers to certain cohorts of vendors. It is important to note that these are certainly not the only areas of differentiation among technology suppliers and that most digital commerce vendors are strong in multiple criteria overall.

FIGURE 2

Common B2B Digital Commerce Differentiators

Business agility led
Your organization is primarily focused on differentiating with **business agility and a fast time to market**, with a platform that is very business user–friendly and often offers a low TCO.

Experience led
Your organization is primarily focused on differentiating based on **delivering rich content and experiences**, with a platform pre-integrated with content management software.

Customizability led
Your organization is primarily focused on differentiating by building **a unique and highly customized B2B commerce experience**, with a platform offering deep functionality.

Technology agility led
Your organization is primarily focused on differentiating with **technological agility and adapting to change**, with a platform that has a modern cloud architecture.

Industry led
Your organization is primarily focused on differentiating by offering digital commerce **in specific industries or niches**, with a platform purpose-built for your customers' specific needs.

Source: IDC, 2020

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The vendor list for this evaluation consists of 18 vendors and was selected to depict the vendors that are most representative of any given B2B digital commerce platform buyer's selection shortlist. Inclusion criteria include:

▪ The vendor has an active customer base and is reported as seen in deals by other B2B digital commerce platform vendors.

- The vendor meets IDC's definition for a B2B digital commerce platform in terms of functionality supported, such as shopping cart, order management, and catalog management (see the Market Definition section and refer to Figure 3).

- The vendor's B2B digital platform is qualified as "SaaS or cloud enabled."

- The vendor is tracked in IDC's Software Tracker.

- The vendor goes to market as a B2B digital commerce platform, specifically seeking out B2B organizations such as manufacturers, wholesalers, distributors, and B2B2C.

ADVICE FOR TECHNOLOGY BUYERS

While making purchasing decisions on B2B digital commerce platforms, organizations should seek out the following:

- A vendor that supports your organization's specific area of differentiation (see the Areas of Differentiation for B2B Sellers section)

- A strong cloud strategy and road map (Cloud-ready solutions deliver greater business value, faster innovation, and quicker time to market.)

- A modern, API-first, microservices-based architecture to ensure performance and ease of integration

- An innovation track record and a demonstrated ability to deliver enhancements on a regular cadence in a seamless manner

- Out-of-the-box integrations to adjacent applications such as ERP, CRM, order management, product information management (PIM), web content management (WCM), and payments to minimize custom code required

- Support for global commerce for organizations doing business in multiple geographies (support for multiple languages, currencies, regulations, etc.)

- A vendor with an innovation-rich product road map, with focus on areas such as artificial intelligence, mobile commerce, and future business models (i.e., subscriptions)

- Financial stability and ability to support future digital commerce applications for commerce requirements

- A strong partner ecosystem for implementation and support

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Adobe

After a thorough evaluation of Adobe's strategies and capabilities, IDC has positioned the company in the Major Players category within this 2020 IDC MarketScape for B2B digital commerce platforms.

Adobe is a publicly held vendor of creative, document management, digital experience management, marketing, and digital commerce software founded in 1982 and is headquartered in San Jose, California, United States. The company's B2B digital commerce product, Magento Commerce, is a

B2B and B2C commerce platform with an open source foundation and sold in Adobe's Experience Cloud. Quick facts about Adobe include:

- **Employees:** Over 22,200
- **Global reach:** Digital commerce customers with headquarters in over 50 countries
- **B2B industry focus:** Industrial manufacturing, consumer good manufacturing, distribution, technology (software and hardware), financial services, pharma and biotech services, and media and publishing
- **Ideal customer size:** SMB to large enterprise
- **Cloud:** Multitenant at the infrastructure layer and single tenant at the database and application layers and available on AWS and Azure
- **Pricing model:** Flat annual subscription fee based on annual online GMV or orders
- **Largest customer:** $189 billion in GMV transacted on Magento in 2019
- **Partner ecosystem:** Has over 430 implementation partners and over 160 technology partners for B2B digital commerce
- **Interesting fact:** In response to COVID-19, Adobe created a funding program for Magento solution partners that had been adversely impacted by COVID-19. The program enabled partners to temporarily place skilled developers who were at risk of being furloughed with Adobe to contribute to Magento's road map via its existing Community Engineering Program.

Strengths

- **Market awareness:** Of the vendors in this evaluation, Adobe is one of the vendors seen most often in competitive B2B digital commerce platform deals. Magento Commerce also has a very large ecosystem of partners and developers.
- **Experience management:** Magento Commerce is a part of Adobe's broader Experience Cloud offering, allowing merchants to augment their core commerce platform in areas such as web content management, digital asset management, analytics, and marketing automation.
- **Business model flexibility:** Magento supports business model diversity through subscriptions, franchises, and enterprise marketplace models as well as supports physical, digital, configurable, and service product types.

Challenges

- **Single tenant:** While Magento Commerce can be deployed in the cloud, today it is predominantly a single-tenant application with only newer capabilities being delivered as true multitenant SaaS. Adobe is making a long-term investment to evolve to a microservices- and SaaS-based architecture that better aligns with IDC's belief that the future of B2B digital commerce is multitenant SaaS. However, this will be a multiyear endeavor for Adobe.
- **Site search:** Adobe's native search, based on Elastic Search, lags behind other search offerings on the market. The company is investing in AI-driven site search capabilities that will roll out in beta form in the fourth quarter of 2020 and be generally available in the first half of 2021.
- **Product road map communication:** Customers we interviewed rated Adobe well below average for product road map communication. Customers expressed that Adobe could do a better job by regularly informing customers about future road map initiatives and timelines.

Consider Adobe When

Consider Adobe if you are looking for a B2B digital commerce platform with a large ecosystem and can support a wide range of business models or you want to use Adobe for content management and/or marketing. Consider it if your organization is primarily focused on differentiating by building a unique and highly customized commerce experience with a platform offering deep functionality.

BigCommerce

After a thorough evaluation of BigCommerce's strategies and capabilities, IDC has positioned the company in the Major Players category within this 2020 IDC MarketScape for B2B digital commerce platforms.

BigCommerce is a publicly held vendor of digital commerce software founded in 2009 and is headquartered in Austin, Texas, United States. The company's B2B digital commerce product, BigCommerce, is a cloud-native SaaS commerce platform for B2B and B2C digital commerce on the same platform. Quick facts about BigCommerce include:

- **Employees:** Over 740
- **Global reach:** Digital commerce customers with headquarters in over 150 countries
- **B2B industry focus:** Manufacturing, safety supplies, auto parts, distributors, and residential building supplies
- **Ideal customer size:** SMB to large enterprise
- **Cloud:** Multitenant at the infrastructure, database, and application layers and available on Google Cloud
- **Pricing model:** Tiered monthly subscriptions for smaller organizations and a monthly subscription fee based on annual order volume and price per order for enterprises
- **Largest customer:** Largest B2B digital commerce customers process over 160,000 orders annually on BigCommerce
- **Partner ecosystem:** Has over 300 certified implementation partners and over 800 technology partners for B2B digital commerce
- **Interesting fact:** BigCommerce maintains a strong employee culture with a program called "Bucket 2," which advises employees on how to behave and interact with each other. BigCommerce uses Bucket 2 as a litmus test and monitors employees' Bucket 2 throughout their time at the company to help ensure BigCommerce is a great place to work.

Strengths

- **Level of value:** Customers we interviewed rated BigCommerce above average for the level of value delivered relative to the price paid for the application.
- **App marketplace:** BigCommerce offers an app marketplace for add-ons to the core commerce offering in areas such as PIM, shipping, ERP, order management, and marketing content management. In total, there are over 800 apps on the marketplace.
- **Implementation experience:** Customers we interviewed rated BigCommerce above average for its implementation experience. Smaller customers we spoke with were able to implement without developers.

Challenges

- **Analytics:** Customers we interviewed said that BigCommerce lacks deep analytics/business intelligence functionality. One customer said, "BigCommerce has a nice little dashboard, but you can't dig deep like in other vendors. I expect more."

- **Partner app reliance:** BigCommerce lacks some advanced B2B functionality natively in its platform, such as CPQ, bidirectional workflows/approvals, B2B sales rep masquerading, and advanced order management. BigCommerce provides close technology partners to fill these gaps, such as BundleB2B, but these partner apps require a separate subscription.

- **Product road map relevancy:** Customers we interviewed rated BigCommerce below average when asked how relevant BigCommerce's product road map is for their organizations.

Consider BigCommerce When

Consider BigCommerce if you are a fast-growing, experience-driven brand looking for a multitenant SaaS B2B digital commerce platform. Consider it if your organization is primarily focused on differentiating with business agility and fast time to market with a platform that is very business user-friendly.

commercetools

After a thorough evaluation of commercetools' strategies and capabilities, IDC has positioned the company in the Major Players category within this 2020 IDC MarketScape for B2B digital commerce platforms.

commercetools is a privately held vendor of digital commerce software founded in 2006 and is headquartered in Munich, Germany. The company's B2B digital commerce product, commercetools SaaS Platform, is a cloud-native, SaaS, microservices-based digital commerce platform for both B2B and B2C. commercetools is built API-first and is completely headless, meaning customers must leverage external technology for the presentation layer. Quick facts about commercetools include:

- **Employees:** Over 250
- **Global reach:** Digital commerce customers with headquarters in over 71 countries
- **B2B industry focus:** Agriculture, mining and construction, automotive, commercial printing, education, energy – oil and gas, fashion, food and beverage, life sciences and healthcare, manufacturing, media and entertainment, telco, travel and leisure, and wholesale
- **Ideal customer size:** Upper midmarket to large enterprise
- **Cloud:** Multitenant at the infrastructure, database, and application layers and available on Google Cloud and AWS as a multitenant service (rather than hosted)
- **Pricing model:** Transaction based or flat fee models depending on customers' business case
- **Largest customer:** Largest digital commerce customer processes 200 million orders annually on commercetools SaaS platform
- **Partner ecosystem:** Has over 70 implementation partners and over 45 technology partners for B2B digital commerce
- **Interesting fact:** commercetools' 250+ employees come from 43 different nations working in nine offices across three continents.

Strengths

- **API-first:** commercetools is best suited for enterprises looking for a platform built for headless commerce deployments. In addition, commercetools exposes 100% of its functionality via REST and GraphQL APIs.
- **Modular architecture:** commercetools has a flexible architecture consisting of over 300 APIs that customers can purchase à la carte, if they desire, to build a commerce platform that suits their specific needs.
- **Application performance:** Customers we interviewed rated commercetools above average for application performance in terms of speed and uptime.

Challenges

- **Line-of-business positioning:** commercetools performs well in deals led by technical teams who have complex architectural requirements. But the company has a harder time conveying its value to business users such as CMO.
- **Product road map:** Customers we interviewed rated commercetools below average for both product road map relevancy and communication. Multiple customers we spoke with mentioned that they would like to see a product road map from commercetools more often.
- **Business tooling:** Customers we interviewed expressed that they would like to see improvements in commercetools' business tooling. Specifically, they would like to see more investment in the company's merchant center for more flexible back-end experiences.

Consider commercetools When

Consider commercetools if you are an upper midmarket to large enterprise brand or manufacturer looking for a headless commerce platform that can support both B2B and B2C. Consider it if your organization is primarily focused on differentiating with technological agility and adapting to change with a platform that has a modern cloud architecture.

Conga

After a thorough evaluation of Conga's strategies and capabilities, IDC has positioned the company in the Major Players category within this 2020 IDC MarketScape for B2B digital commerce platforms.

Conga is a privately held vendor of configure price quote (CPQ), contract life-cycle management (CLM), B2B digital commerce, and revenue management applications. The company is owned by the private equity firm Thoma Bravo. The company was founded in 2006 as Apttus and is headquartered in San Mateo, California, United States. Apttus acquired Conga in 2019 and rebranded under the Conga name. The company's digital commerce product, Conga E-Commerce, is cloud native, built on the Force.com platform, and typically offered in conjunction with the company's CPQ offering. Quick facts about Conga include:

- **Employees:** Over 1,500
- **Global reach:** Digital commerce customers with headquarters in over 35 countries
- **B2B industry focus:** Communications, energy, financial services, healthcare, high tech, manufacturing, life sciences, media and entertainment, and business services
- **Ideal customer size:** Upper midmarket and large enterprise
- **Cloud:** Multitenant at the application, database, and infrastructure layers and available on Force.com cloud infrastructure (Conga's MAX intelligent assistant runs on Azure infrastructure)

- **Pricing model:** Based on named users and transactions per month
- **Largest customer:** Largest B2B digital commerce customers process over 2.5 million transactions annually on Conga E-Commerce
- **Partner ecosystem:** Has more than 22 implementation partners and more than 10 technology partners for B2B digital commerce
- **Interesting fact:** As a company, Conga has its roots in contract management (both legacy Apttus and legacy Conga) and hence customer experience around order form presentation, approvals, and signatures is ingrained into its culture and is reflected on all of Conga's product tracks.

Strengths

- **Quote-to-cash suite:** Conga's various offerings (CPQ, CLM, digital commerce, etc.) provide customers with an end-to-end quote-to-cash system. The systems are built on the same data model, native to the Force.com platform, allowing easier implementations and upgrades.
- **Customer support:** Customers we interviewed rated Conga above average in terms of customer support, stating that Conga's customer support team always responds and resolves issues quickly.
- **Manufacturing strength:** Conga's digital commerce applications have integrations with numerous manufacturing-specific providers, including CADSiemens Teamcenter, Siemens Rulestream, CDS, SolidWorks, and AutoCad.

Challenges

- **Standalone digital commerce deals:** Conga's value proposition is around offering a complete quote-to-cash suite, where digital commerce is typically an add-on module for Conga's CPQ application. Thus, the company does not perform as well with customers that need a standalone digital commerce platform.
- **Promotions management:** Conga customers expressed some difficultly with the promotions module. One customer stated that it required IT resources to set up promotions.
- **Brand identity:** Following Apttus' acquisition of Conga, the company will need to reestablish its brand identity under the new Conga.

Consider Conga When

Consider Conga if you are an enterprise with complex quote-to-cash needs, including a self-service B2B digital commerce storefront for accepting orders. Consider it if your organization is primarily focused on differentiating with technological agility and adapting to change with a platform that has a modern cloud architecture.

Elastic Path

After a thorough evaluation of Elastic Path's strategies and capabilities, IDC has positioned the company in the Major Players category within this 2020 IDC MarketScape for B2B digital commerce platforms.

Elastic Path is a privately held pure-play vendor of digital commerce software founded in 2000 and is headquartered in Vancouver, Canada. The company's digital commerce product, Elastic Path Commerce, is API-first and sold in a headless fashion, meaning customers must leverage external technology for the front-end presentation layer. Elastic Path announced the acquisition of Moltin, a multitenant and microservices-based commerce platform, in January 2020 to modernize its

architecture for the future. This acquired product has been rebranded as Elastic Path Commerce Cloud and is sold alongside Elastic Path's core commerce platform; however, Elastic Path Commerce Cloud was not considered for this evaluation. Quick facts about Elastic Path include:

- **Employees:** Over 200
- **Global reach:** Digital commerce customers with headquarters in over 15 countries
- **B2B industry focus:** Telco, manufacturing, distribution, wholesale, high tech and IT, life sciences, healthcare, publishing, travel, automotive, utilities, media, education, services, and agriculture
- **Ideal customer size:** Midmarket to large enterprise
- **Cloud:** Multitenant at the infrastructure layer and single tenant at the database and application layers and available on AWS, Azure, Google Cloud Platform, and others
- **Pricing model:** Volume-based tiers based on either order volume or GMV
- **Largest customer:** Largest B2B digital commerce customers process over 10 million orders annually on Elastic Path Commerce
- **Partner ecosystem:** Has over 50 implementation partners and over 12 technology partners for B2B digital commerce
- **Interesting fact:** In mid-2019, a single Elastic Path customer was able to process over 400tps on the platform.

Strengths

- **Moltin acquisition:** Elastic Path's long-term product vision became clearer with the acquisition of Moltin (now Elastic Path Commerce Cloud). The company now has the foundation for a modern, cloud-native, multitenant, and microservices-based commerce platform that will be able to adapt to future trends in commerce.
- **Built for headless:** Elastic Path was one of the first vendors to go to market with a headless digital commerce offering, where the front-end presentation layer and the back-end commerce layer are decoupled. Elastic Path is suited well to win customers' interest in this growing trend.
- **Customer support:** Customers we interviewed rated Elastic Path above average for customer support satisfaction. Multiple customers commented that they feel "heard and listened to."

Challenges

- **User interface (UI):** While many customers do not interact directly with Elastic Path's UI, since it is a headless commerce platform, customers we interviewed rated Elastic Path below average for its user interface.
- **Two product support:** Elastic Path has articulated a long-term commitment to both the Elastic Path Commerce and Elastic Path Commerce Cloud (Moltin) offerings; however, the company will need to balance R&D and go-to-market resources appropriately in order to ensure both products remain competitive.
- **Ease of upgrade:** Customers we interviewed rated Elastic Path below average when asked how easy it is to upgrade between major releases of the application.

Consider Elastic Path When

Consider Elastic Path if you are a midmarket or an enterprise looking for a headless digital commerce platform to enable unique business models. Consider it if your organization is primarily focused on

differentiating with technological agility and adapting to change with a platform that has a modern cloud architecture.

Episerver

After a thorough evaluation of Episerver's strategies and capabilities, IDC has positioned the company in the Leaders category within this 2020 IDC MarketScape for B2B digital commerce platforms.

Episerver is a privately held vendor of content management, digital commerce, personalization, and analytics software. The company was founded in 1994 and is headquartered in Nashua, New Hampshire, United States. The company's B2B digital commerce product, Episerver B2B Commerce Cloud by Insite, is a.NET commerce platform purpose built for B2B that was acquired by Episerver with the acquisition of Insite Software in December 2019. Episerver also supports B2B organizations with its native digital commerce platform; however, this MarketScape evaluated the B2B offering acquired through Insite. Quick facts about Episerver include:

- **Employees:** Over 800
- **Global reach:** Digital commerce customers with headquarters in about 25 countries
- **B2B industry focus:** Manufacturing, distribution, grocery, CPG, and food and beverage
- **Ideal customer size:** Midmarket to large enterprise
- **Cloud:** Multitenant at the infrastructure layer and single tenant at the database and application layers and available on AWS
- **Pricing model:** Based on order volume
- **Largest customer:** Largest B2B digital commerce customers process over 1.1 million orders annually on Episerver B2B Commerce Cloud by Insite
- **Partner ecosystem:** Has over 37 certified implementation partners and over 20 technology partners for B2B digital commerce
- **Interesting fact:** After implementing B2B Commerce Cloud, SPI Health & Safety customers saw a 32-point increase in their digital Net Promoter Score.

Strengths

- **Experience-focused:** Episerver offers a complete and robust content management software (CMS) application as a part of its Digital Experience Platform. Episerver's B2B digital commerce customers will realize the full benefits of the platform if they leverage both Episerver's content and commerce products.
- **Customer support:** Customers we interviewed rated Episerver above average for customer support satisfaction. One customer commented that Episerver is "head and shoulders above others here."
- **Built-in PIM:** Episerver's B2B Commerce Cloud by Insite offers a native product information management module, which customers can purchase for an additional fee. The PIM offering allows customers to unlock better catalog management and the ability to deliver richer product experiences.

Challenges

- **Post-acquisition alignment:** Following the acquisition of Insite, Episerver has stated that it intends to fully support the B2B digital commerce platform as a separate product. However, Episerver's native commerce offering also supports B2B commerce, and the company will

need to build integration and clearly recommend the most appropriate product to prospects depending on their needs.

- **Single tenant:** While Episerver's B2B Commerce Cloud by Insite is offered in the cloud, it is a single-tenant application and not true multitenant SaaS. While Episerver still sees demand for the single-tenant offering, IDC firmly believes the future of B2B digital commerce is multitenant SaaS.
- **Technical integrations:** Customers we interviewed rated Episerver B2B Commerce Cloud by Insite below average when asked how easy it is to integrate with external systems.

Consider Episerver When

Consider Episerver if you are a manufacturer or distributor in the midmarket or enterprise looking for a digital commerce platform specifically built for B2B with an integrated PIM or you are interested in using Episerver's content management offerings. Consider it if your organization is primarily focused on differentiating by building a unique and highly customized commerce experience with a platform offering deep functionality.

HCL

After a thorough evaluation of HCL's strategies and capabilities, IDC has positioned the company in the Major Players category within this 2020 IDC MarketScape for B2B digital commerce platforms.

HCL is a publicly held vendor of IT services and customer experience (CX) software founded in 1976 and is headquartered in Noida, India. The company's B2B digital commerce product, HCL Commerce, is a B2B and B2C digital commerce platform that was originally acquired from IBM in July 2019. Following the acquisition, HCL has taken major steps to update the platform and rekindle relationship with HCL Commerce customers. Quick facts about HCL include:

- **Employees:** Over 150,000
- **Global reach:** Digital commerce customers with headquarters in over 50 countries
- **B2B industry focus:** Manufacturing, wholesale, and distribution
- **Ideal customer size:** Midmarket to large enterprise
- **Cloud:** Single tenant at the infrastructure, database, and application layers and deployable on Google Cloud Platform, IBM Cloud, and others
- **Pricing model:** Primarily uses an order lines model (called RVU), which is based on the number of orders processed or pricing based on processing power used (PVU) for legacy clients
- **Largest customer:** Largest B2B digital commerce customers process over 40 million orders annually on HCL Commerce
- **Partner ecosystem:** Has over 80 implementation partners and over 60 technology partners for B2B digital commerce
- **Interesting fact:** One HCL Commerce customer, Follett, provides a B2B2C platform for college bookstores and was able to go live with 1,800 online stores. Following the onset of COVID-19, Follett was able to support 70% of its business shifting to the online store.

Strengths

- **Platform modernization:** Over the past year, HCL has focused heavily on updating the technology of its commerce platform. HCL has focused on breaking down the monolithic

architecture of IBM WebSphere with containers and has leveraged Google services to improve areas such as search, PWA support, and content management natively.

- **Technical integrations:** Customers we interviewed rated HCL above average when asked how easy it is to build integrations with external systems. One customer commented that HCL offers a lot of integrations out of the box and it is easy to build new integrations.

- **Product road map relevancy:** Customers we interviewed rated HCL above average for product road map relevancy. Numerous customers expressed that the level of communication has improved since HCL took ownership of the commerce platform, leading to a better aligned road map.

Challenges

- **Legacy perception:** HCL faces a strong industry perception that the commerce offerings it acquired from IBM, including IBM WebSphere and IBM Digital Commerce, are outdated and lack agility. Specifically, HCL has made efforts to break down the monolithic architecture of IBM WebSphere and must convince prospects that it is investing in the platform.

- **Implementation experience:** Customers we interviewed rated HCL below average when asked how easy the application is to implement. One customer commented, "It is a complex system to implement and not for the meek."

- **Single tenant:** While HCL Commerce can be deployed in any private, public, or hybrid cloud, it is a single-tenant application and not true multitenant SaaS. While HCL still sees demand for its single-tenant offering, IDC firmly believes the future of B2B digital commerce is multitenant SaaS.

Consider HCL When

Consider HCL if you are looking for an all-in-one digital commerce platform that can handle complex enterprise requirements for a wide range of business models. Consider it if your organization is primarily focused on differentiating by building a unique and highly customized commerce experience with a platform offering deep functionality.

Infor

After a thorough evaluation of Infor's strategies and capabilities, IDC has positioned the company in the Contenders category within this 2020 IDC MarketScape for B2B digital commerce platforms.

Infor is a privately held vendor of industry-specific enterprise applications, including B2B digital commerce software, founded in 2002 and is headquartered in New York City, New York, United States. Infor was acquired by Koch Industries in April 2020 and operates as a separate subsidiary of Koch. The company's digital commerce product, Infor Rhythm for Commerce, is a SaaS B2B digital commerce platform that comes pre-integrated with Infor's CloudSuite ERP. Quick facts about Infor include:

- **Employees:** Over 17,000
- **Global reach:** Digital commerce customers with headquarters in over 10 countries
- **B2B industry focus:** Distribution, industrial manufacturing, and fashion
- **Ideal customer size:** Midmarket to large enterprise
- **Cloud:** Multitenant at the infrastructure, database, and application layers and available on AWS
- **Pricing model:** Subscription-based pricing structure with transaction-based tiers

- **Largest customer:** Largest B2B digital commerce customers process over 40,000 orders annually on Infor Rhythm for Commerce
- **Partner ecosystem:** Has one implementation partner and one technology partner for B2B digital commerce
- **Interesting fact**: For Soma Somasundaram, being number 1 has dual meanings. First, Somasundaram was on the ground floor for Infor's launch as employee number 1. Today, he's at the top of the ladder with the title of president of Products and Infor's chief technology officer. He's the number 1 driving force behind Infor's innovation and modernization of products.

Strengths

- **Connected front and back office:** Infor Rhythm was architected to be fully integrated with various Infor ERP solutions, including Infor CloudSuite for manufacturing. A few other B2B digital commerce vendors offer a product integrated as closely to ERP.
- **CPQ integration:** Rhythm for Commerce is pre-integrated with Infor CPQ, a full-fledged configure price quote application that supports complex configuration for manufacturers. Customers leveraging both applications can unlock the power of CPQ embedded directly within self-service B2B storefronts, a value proposition a few other vendors can provide.
- **B2B + B2C:** A majority of Infor's digital commerce customers use the platform for both B2B and B2C selling, which are both supported on the same application.

Challenges

- **Customers in flight:** A large share of Infor's digital commerce customers are not live and are in either the implementation phase or the pre-implementation phase.
- **Customer support:** Customers we interviewed rated Infor below average for customer support satisfaction.
- **Limited ecosystem:** Infor Rhythm for Commerce has a limited partner network on both the implementation and technology sides, which holds the company back from winning more deals globally.

Consider Infor When

Consider Infor if you are a manufacturer or distributor looking for a SaaS B2B digital commerce platform or your organization uses Infor for other enterprise applications and is focused on differentiating based on fast time to market and having a tight integration between the front office and the back office for commerce. Consider it if your organization is primarily focused on differentiating with business agility and fast time to market with a platform that is very business user-friendly.

Oracle

After a thorough evaluation of Oracle's strategies and capabilities, IDC has positioned the company in the Leaders category within this 2020 IDC MarketScape for B2B digital commerce platforms.

Oracle is a publicly held vendor of enterprise applications, database applications, hardware, and IT services founded in 1977 and is headquartered in Redwood Shores, California, United States. The company's B2B digital commerce product, Oracle CX Commerce, is a B2B and B2C commerce platform that Oracle built as an API-first, cloud-native application that leverages acquired functionality from ATG and Endeca. The application is sold within Oracle's broader CX suite. Quick facts about Oracle include:

- **Employees:** Over 135,000
- **Global reach:** Digital commerce customers with headquarters in over 50 countries
- **B2B industry focus:** Industrial manufacturing, high tech, and consumer goods
- **Ideal customer size:** Upper midmarket to large enterprise
- **Cloud:** Multitenant at the infrastructure layer and single tenant at the database and application layers and deployed on Oracle Cloud (Some commerce services are deployed in a multitenant cloud.)
- **Pricing model:** Subscription based on revenue share or page views
- **Largest customer:** Largest digital commerce customers generate GMV of approximately $2 billion a year on Oracle CX Commerce
- **Partner ecosystem:** Has over 70 implementation partners and over 100 technology partners for B2B digital commerce
- **Interesting fact:** At Oracle's last in-person CX user event, two Oracle customers at WebContinental got tattoos that said "#CX Hero" on their arms.

Strengths

- **CX suite:** Oracle offers a broad and deep suite of customer experience applications, including CX Sales, CX Marketing, and CX Service. A few other vendors support this breadth of front-end applications.
- **CPQ plus commerce:** Oracle CX Commerce comes pre-integrated with Oracle CPQ. Organizations leveraging both applications can unlock more mature B2B buying experiences where end customers can configure products and checkout directly on a self-service B2B storefront.
- **API-first:** Oracle CX Commerce is a hybrid headless system with a fully extensible presentation layer included in the offering. Customers can choose to not leverage the built-in front end and use CX Commerce as a headless solution. However, Oracle has indicated that its strategic go to market lies in offering a fully packaged commerce platform, which is how most of its customers choose to consume the offering.

Challenges

- **Not fully multitenant:** Oracle CX Commerce was purposefully architected as a single-tenant application to support both B2C and B2B natively as well as security, control, and performance. IDC firmly believes the future of B2C digital commerce is multitenant SaaS. Separately, Oracle continues to support its on-premises Oracle Commerce customers.
- **Implementation experience:** Customers we interviewed rated Oracle well below average in terms of how easy the application is to implement.
- **Technical integrations:** Customers we interviewed rated Oracle well below average when asked how easy it is to build integrations with external systems. One customer commented that it has had challenges "with every integration."

Consider Oracle When

Consider Oracle if you are an organization with over $500 million in revenue looking for a digital commerce platform built to support a wide range of business models, including product/ service configuration rules, subscription models, and/or deep integration with Oracle's CPQ application, or you leverage Oracle for other CX applications. Consider it if your organization is primarily focused on differentiating by building a unique commerce experience with a platform offering deep functionality.

Oro

After a thorough evaluation of Oro's strategies and capabilities, IDC has positioned the company in the Major Players category within this 2020 IDC MarketScape for B2B digital commerce platforms.

Oro is a privately held vendor of open source digital commerce and CRM software founded in 2012 and is headquartered in Los Angeles, California, United States. The company's B2B digital commerce product, OroCommerce, is an open source digital commerce application built using Symfony framework specifically for B2B digital commerce. OroCommerce comes pre-integrated with Oro's CRM offering at no additional cost. Quick facts about Oro include:

- **Employees:** Over 150
- **Global reach:** Digital commerce customers with headquarters in over 25 countries
- **B2B industry focus:** Manufacturers, distributors, retailers, and brands
- **Ideal customer size:** Midmarket to enterprise
- **Cloud:** Multitenant at the infrastructure layer and single tenant at the database and application layers and can be deployed on AWS, Azure, Google Cloud, or Oro's own cloud
- **Pricing model:** Yearly tiered subscription fee based on GMV and administrative users
- **Largest customer:** Largest B2B digital commerce customers process over 1 million orders annually on OroCommerce
- **Partner ecosystem:** Has 38 implementation partners and over 35 technology partners for B2B digital commerce
- **Interesting fact:** Many of the members of Oro's executive team worked together during the early days at Magento and are now distributed over the world. The team has a yearly motorcycle ride, called "Ororide," with customers and partners.

Strengths

- **B2B focus:** Oro is purpose built for B2B digital commerce and comes with deep B2B-specific functionality, including granular workflow/permissions and a strong pricing engine.
- **CRM integration:** Oro is one of the few digital commerce vendors to offer CRM that is on the same code base as commerce and comes natively integrated.
- **Flexibility:** As an open source platform, OroCommerce is highly customizable and can support a wide range of B2B organizations with complex needs.

Challenges

- **Single tenant:** OroCommerce can be deployed in the OroCloud, which includes full management of all hosting, scaling, and security needs, but is a single-tenant application and not true multitenant SaaS. While Oro still sees demand for its single-tenant offering, Oro has plans on launching a multitenant offering in the future, which would align with IDC's belief that the future of B2B digital commerce is multitenant SaaS.
- **Application performance:** Customers we interviewed rated Oro below average for application performance. One customer stated that it wished it was easier to understand how to improve store performance. With that said, most Oro customers run highly complex B2B stores on the platform with numerous integrations.
- **Artificial intelligence strategy:** Customers we interviewed rated Oro below average for artificial intelligence strategy.

Consider Oro if you are a midmarket to enterprise B2B organization looking for a digital commerce platform purpose-built for B2B or you are interested in natively integrated digital commerce and CRM. Consider it if your organization is primarily focused on differentiating by building a unique and highly customized commerce experience with a platform offering deep functionality.

Salesforce

After a thorough evaluation of Salesforce's strategies and capabilities, IDC has positioned the company in the Major Players category within this 2020 IDC MarketScape for B2B digital commerce platforms.

Salesforce is a publicly held vendor of customer experience software founded in 1999 and is headquartered in San Francisco, California, United States. The company's B2B digital commerce product, Salesforce B2B Commerce, is a multitenant SaaS digital commerce platform built on the Force.com platform that was originally acquired in 2018 with the acquisition of CloudCraze. In 2020, the company launched a net-new B2B digital commerce platform, B2B Commerce on Lightning Experience, which is built natively on Salesforce Lightning. This IDC MarketScape evaluated Salesforce B2B Commerce (formerly CloudCraze). Quick facts about Salesforce include:

- **Employees:** Over 54,000
- **Global reach:** Digital commerce customers with headquarters in over 40 countries
- **B2B industry focus:** Consumer goods, manufacturing, healthcare, tech, and services
- **Ideal customer size:** Midmarket to large enterprise
- **Cloud:** Multitenant at the infrastructure, database, and application layers and available on Salesforce's own cloud infrastructure
- **Pricing model:** Tiered versions based on number of orders, storefronts, products, and whether multichannel orders to be included (Customers that don't previously have Customer Community licenses will need to purchase.)
- **Largest customer:** Largest B2B digital commerce customers process over 2.4 million orders annually on Salesforce B2B Commerce
- **Partner ecosystem:** Has 63 implementation partners and 21 technology partners for B2B digital commerce
- **Interesting fact:** Boston Dynamics launched a B2B Commerce site in less than 6 weeks, going live in June 2020. On the site, it is selling robots called Spot for $75,000+ per robot. One use case for Spot is to provide socially distanced healthcare to patients with COVID-19.

Strengths

- **Market awareness:** Of the vendors in this evaluation, Salesforce is one of the vendors most often seen in competitive B2B digital commerce platform deals. Salesforce B2B Commerce has a very large ecosystem of partners and developers.
- **Salesforce platform:** Salesforce B2B Commerce is a part of Salesforce's broader customer experience suite of applications, including CRM, marketing, and customer service, among others. Salesforce launched native content management and order management applications in 2019.
- **CPQ plus commerce:** Salesforce B2B Commerce comes pre-integrated with Salesforce CPQ. Organizations leveraging both applications can unlock more mature B2B buying experiences

where end customers can configure products and checkout directly on a self-service B2B storefront.

Challenges

- **Multiple B2B offerings:** With Salesforce's recent release of B2B Commerce on Lightning Experience, the company now offers two SaaS B2B digital commerce applications native to Salesforce. Salesforce plans to support both platforms going forward and is prescriptive to prospects about the pros and cons of both platforms. IDC believes that Salesforce will eventually need to "choose" which platform it wants to support for the long term in terms of development and investment.

- **Separate B2C and B2B:** Salesforce's B2C and B2B digital commerce platforms were assembled through the acquisitions of Demandware and CloudCraze, respectively. As a result, the applications have different architectures, and Salesforce commerce customers are unable to manage both B2B and B2C stores from the same module.

- **Headless ecosystem:** Salesforce has had several customers successfully deploy the platform in a headless fashion; however, Salesforce has not historically invested in the ecosystem to support its commerce APIs. The company has made large strides toward being a headless digital commerce platform in the past two years by improving its API documentation and educating and encouraging partners.

Consider Salesforce When

Consider Salesforce if you are a B2B organization looking for a SaaS digital commerce platform that is tightly integrated to other Salesforce applications, such as CRM, marketing, and customer service. Consider it if your organization is primarily focused on differentiating with business agility and fast time to market with a platform that is very business user-friendly.

SAP

After a thorough evaluation of SAP's strategies and capabilities, IDC has positioned the company in the Leaders category within this 2020 IDC MarketScape for B2B digital commerce platforms.

SAP is a publicly held vendor of enterprise applications and services founded in 1972 and is headquartered in Walldorf, Germany. The company's B2B digital commerce product, SAP Commerce Cloud, is a B2B and B2C digital commerce platform that was originally acquired by SAP with the acquisition of hybris in 2013. SAP launched a new multitenant SaaS and microservices-based digital commerce application in June 2019 called SAP Upscale Commerce; however, this product was not considered for this evaluation. Quick facts about SAP include:

- **Employees:** Over 100,000
- **Global reach:** Digital commerce customers with headquarters in over 150 countries
- **B2B industry focus:** Branded manufacturing, high tech, industrial manufacturing, wholesale and distribution, financial services, automotive, public sector, telco, CPG, and life sciences
- **Ideal customer size:** Upper midmarket to large enterprise
- **Cloud:** Multitenant at the infrastructure layer and single tenant (partially multitenant) at the database and application layers and available on Azure
- **Pricing model:** Either annual GMV or annual number of orders flowing through the platform
- **Largest customer:** Largest B2B digital commerce customers process over 20 million orders annually on SAP Commerce Cloud.

- **Partner ecosystem:** Has over 280 implementation partners and over 96 technology partners for B2B digital commerce
- **Interesting fact:** SAP has a diverse team working on its commerce platform, with over 50 nationalities represented.

Strengths

- **CX portfolio:** SAP offers a broad and deep portfolio of customer experience applications, including CRM, marketing, CPQ, and service. A few other vendors support this breadth of front-end applications in addition to SAP's back-office applications.
- **Built for the future:** Customers we interviewed rated SAP above average when asked whether SAP Commerce Cloud is "built for the future." One customer commented, "This is where SAP is really good. They were a bit late to market here but have gotten ahead."
- **Personalization:** SAP's context-driven services provide deep personalization capabilities to tailor commerce experiences based on a customer's current session and A/B testing to continuously improve results.

Challenges

- **Not fully multitenant:** SAP Commerce Cloud can be deployed in the cloud, but it is not yet fully multitenant SaaS. While SAP still sees demand for its offering, IDC firmly believes the future of B2B digital commerce is multitenant SaaS.
- **Implementation experience:** Customers we interviewed rated SAP well below average for ease of implementation.
- **Level of value delivered:** Customers we interviewed rated SAP well below average for the level of value delivered relative to cost.

Consider SAP When

Consider SAP if you are an enterprise looking for an all-in-one digital commerce platform that can handle complex enterprise requirements and can support both B2B and B2C business models or you use SAP for other CX applications. Consider it if your organization is primarily focused on differentiating by building a unique and highly customized commerce experience with a platform offering deep functionality.

Sitecore

After a thorough evaluation of Sitecore's strategies and capabilities, IDC has positioned the company in the Contenders category within this 2020 IDC MarketScape for B2B digital commerce platforms.

Sitecore is a privately held vendor of content management, digital commerce, content marketing, and digital asset management software founded in 2001 and is headquartered in San Francisco, California, United States. The company's B2B digital commerce product, Sitecore Experience Commerce, is a product line built on the same.NET platform as Sitecore's content management platform. Sitecore released the net-new commerce platform in 2018 to replace its previous commerce platform. Quick facts about Sitecore include:

- **Employees:** Over 1,300
- **Global reach:** Digital commerce customers with headquarters in over 40 countries
- **B2B industry focus:** Financial services (including insurance), life sciences and healthcare, high technology and IT, manufacturing, telecommunications, wholesale, tourism, and nonprofit

- **Ideal customer size:** Midmarket to large enterprise
- **Cloud:** Multitenant at the infrastructure layer and single tenant at the database and application layers and available on Azure
- **Pricing model:** Tiered subscription pricing based on monthly visits and standard entitlements with additional add-on for administration of concurrent users, domains, and environments
- **Largest customer:** Largest B2B digital commerce customers process over 1 million orders annually on Sitecore Experience Commerce
- **Partner ecosystem:** Has over 100 implementation partners and over 5 technology partners for B2B digital commerce
- **Interesting fact:** Sitecore Experience Commerce introduced the development concept of Minions, which are similar to the animated characters from the movies. Minions in Experience Commerce are the various background components designed to perform tasks related to orders, data indexing, and managing the commerce environment.

Strengths

- **Experience focused:** Sitecore offers a complete and robust CMS application on the same platform as its Experience Commerce offering, allowing customers to build engaging commerce experiences to customers.
- **Customer support:** Customers we interviewed rated Sitecore above average for customer support satisfaction.
- **Road map relevancy:** Customers we interviewed with B2B businesses rated Sitecore above average for product road map relevancy.

Challenges

- **Single tenant:** While Sitecore Experience Commerce is offered in a single-tenant cloud, it is not true multitenant SaaS. While Sitecore still sees demand for its single-tenant offering, IDC firmly believes the future of B2B digital commerce is multitenant SaaS.
- **Application performance:** Customers we interviewed rated Sitecore below average for application performance or responsiveness.
- **Ease of upgrade:** Customers we interviewed rated Sitecore well below average when asked how easy it is to upgrade between major releases of the application.

Consider Sitecore When

Consider Sitecore if you are a midmarket or enterprise merchant looking for a B2B digital commerce platform that also supports B2C or you leverage Sitecore for content management, digital asset management, and/or marketing. Consider it if your organization is primarily focused on differentiating based on delivering rich content and experiences with a platform pre-integrated with content management software.

Skava

After a thorough evaluation of Skava's strategies and capabilities, IDC has positioned the company in the Contenders category within this 2020 IDC MarketScape for B2B digital commerce platforms.

Skava is a vendor of digital commerce software and services and consulting and is wholly owned by Infosys, a publicly held IT and business consulting and services company. Skava was founded in 2002 and is headquartered in San Francisco, California, United States. The company's B2B digital commerce product, Skava Commerce, is an API-first, microservices-based, and cloud-native digital

commerce platform for both B2B and B2C. Skava was originally acquired by Infosys in 2015. Quick facts about Skava include:

- **Employees:** Over 600 at Skava (over 240,000 at Infosys)
- **Global reach:** Digital commerce customers in over 60 countries
- **B2B industry focus:** Telecommunications, manufacturing, and high tech
- **Ideal customer size:** Midmarket to large enterprise
- **Cloud:** Multitenant and single tenant and deployable on AWS, Azure, and Google Cloud (Most customers deploy single-tenant solutions.)
- **Pricing model:** Perpetual or subscription licensing based on annual order volume (Customers can purchase the entire platform or specific microservices in an à la carte model.)
- **Largest customer:** Largest B2B digital commerce customers process over 3.6 million orders annually on Skava Commerce
- **Partner ecosystem:** Has 2 implementation partners and over 25 technology partners for B2B digital commerce
- **Interesting fact:** Skava powers over 12 different digital commerce models for a global food and beverage CPG company, including a marketplace, recipe site, and subscription site.

Strengths

- **Flexible architecture:** Skava is built on a modern, microservices-based architecture. Customers can purchase modules or services and deploy in a cloud of their choice, affording greater flexibility.
- **Built for headless commerce:** Skava is API-first, meaning all of its functionality is exposed via APIs. Skava supports customers that want to deploy headless with their own front end and also provides its own front end, SkavaSTUDIO.
- **Built for the future:** Customers we interviewed rated Skava above average when asked whether the application is "built for the future." One customer commented, "I think Skava has the most futureproof platform that I'm aware of, unless you build it yourself."

Challenges

- **Market momentum:** Skava lost significant market momentum in 2019 due to a change in business priorities at Infosys. The company is seeing a recovery and movement in a positive direction now that Infosys is focusing and investing more heavily in the digital commerce platform.
- **Technologist focus:** Skava, given its microservices-based headless architecture, performs well in deals with organizations focused on technology and flexibility but has historically been included in fewer deals led by line-of-business buyers. Skava is enhancing its suite of industry capabilities to further appeal to business executives.
- **Artificial intelligence:** Customers we interviewed rated Skava below average for its artificial intelligence strategy. Skava has an add-on AI module for personalization of experience, site search, and product recommendations.

Consider Skava When

Consider Skava if you are a midmarket or enterprise looking to modernize your legacy platform with a digital commerce platform that supports a headless commerce model or you are interested in a microservices-based commerce platform. Consider it if your organization is primarily focused on

differentiating with technological agility and adapting to change with a platform that has a modern cloud architecture.

Spryker

After a thorough evaluation of Spryker's strategies and capabilities, IDC has positioned the company in the Major Players category within this 2020 IDC MarketScape for B2B digital commerce platforms.

Spryker is a privately held vendor of digital commerce software founded in 2014 and is headquartered in Berlin, Germany. The company's digital commerce product, Spryker Cloud Commerce OS, is an API-first (headless), fully modular digital commerce platform for B2B, B2C, and marketplace models. Spryker also acts as a platform-as-a-service application, allowing customers to build highly customized commerce platforms that suite their unique business needs in the Spryker Cloud. In addition, Spryker has a multitenant SaaS offering called Spryker NOW, which was not evaluated for this document. Quick facts about Spryker include:

- **Employees:** Over 200
- **Global reach:** Digital commerce customers with headquarters in over 16 countries
- **B2B industry focus:** Manufacturing (food and beverage, automotive, electronics, and pharma) and services
- **Ideal customer size:** Upper midmarket to enterprise
- **Cloud:** Multitenant at the infrastructure and platform (PaaS) layers and single tenant at the database and application layers and deployable on AWS, Azure, and Google Cloud Platform
- **Pricing model:** GMV, order based, or value based
- **Largest customer:** Largest B2B digital commerce customers process over $1 billion in GMV annually on Spryker
- **Partner ecosystem:** Has over 50 implementation partners and over 60 technology partners for B2B digital commerce
- **Interesting fact:** Following the onset of COVID-19, Toyota was able to launch an B2B2C platform in three weeks. Spryker coined this as "Corona Viable Product" ("CVP") and has been supporting other customers with similar CVP projects since then.

Strengths

- **Modular architecture:** Spryker's digital commerce platform is composed of over 900 API-based, decoupled microservices (modules) that are packaged into 35 business capabilities. It is well suited for organizations looking for an API-first platform where all of their functionality is exposed as APIs and can be deployed in a headless fashion.
- **Platform as a service:** Spryker's PaaS offers greater control on the application level, so they can create bespoke capabilities and integrations. Current Spryker customers have built unique use cases such as multisided marketplaces on Spryker.
- **Customer support:** Customers we interviewed rated Spryker above average for customer support satisfaction. One customer commented, "I have never experienced such great support and customer care before."

Challenges

- **Single tenant:** Spryker's Cloud Commerce OS offering is partially deployed in a single-tenant cloud, where each customer has its own instance of the application so it can be customized to its specific needs. While single tenant, most of the application services are shared and

updated automatically. Regardless, IDC firmly believes that the future of B2B digital commerce is multitenant SaaS.

- **Product road map:** Customers we interviewed rated Spryker below average for both product road map relevancy and communication. One customer commented, "It is sometimes hard to find out what is coming to the product in the future."
- **Line-of-business positioning:** Spryker performs well in deals led by technical teams who have complex architectural requirements. However, the company has a harder time conveying its value to business users such as the CMO.

Consider Spryker When

Consider Spryker if you are an upper midmarket to large enterprise looking for a modular, API-first, digital commerce platform that supports a wide range of business models. Consider it if your organization is primarily focused on differentiating by building a highly customized commerce experience with a platform offering deep functionality.

TrueCommerce

After a thorough evaluation of TrueCommerce's strategies and capabilities, IDC has positioned the company in the Contenders category within this 2020 IDC MarketScape for B2B digital commerce platforms.

TrueCommerce is a privately held vendor of EDI management, supply chain management, and digital commerce software founded in 1995 and is headquartered in Cranberry, Pennsylvania, United States. The company's B2B digital commerce product, TrueCommerce Nexternal, is a cloud-native, SaaS digital commerce platform that comes pre-integrated with TrueCommerce Foundry, which allows B2B and B2C sellers to accept orders and manage inventory across numerous different channels. Quick facts about TrueCommerce include:

- **Employees:** Over 560
- **Global reach:** Digital commerce customers with headquarters in over 10 countries
- **B2B industry focus:** Automotive, food and beverage, medical equipment, health and wellness, and sporting goods
- **Ideal customer size:** SMB to upper midmarket
- **Cloud:** Multitenant at the infrastructure, database, and application layers and available on TrueCommerce's own cloud infrastructure
- **Pricing model:** One-time setup fee for onboarding and a simple order volume-based monthly subscription fee; one-time setup fee and monthly subscription for supply chain and commerce apps including advanced inventory management, advanced fulfillment, PIM, ERP integration, and channel connectors
- **Largest customer:** Largest digital commerce customers process over 250,000 orders annually on TrueCommerce Nexternal
- **Partner ecosystem:** Has one implementation partner and 50 technology partner for B2B digital commerce
- **Interesting fact:** TrueCommerce's first digital commerce customer was Ballast Point Brewing in January 2000 and is still a digital commerce client today.

Strengths

- **Unified brand identity:** TrueCommerce Nexternal utilizes a "site sync" process, which offers merchants a modern brand experience for their B2B customers. This provides a unified shopping experience as opposed to a B2B store that is a basic template-driven experience. **Level of value delivered:** Customers we interviewed rated TrueCommerce above average for the level of value delivered relative to the price paid for the application.
- **Customer support:** Customers we interviewed rated TrueCommerce above average for customer support satisfaction.

Challenges

- **Partner ecosystem:** TrueCommerce Nexternal has a limited partner network on both the implementation and technology sides, which holds the company back from winning more deals globally.
- **Road map relevancy:** Customers that we that we interviewed rated TrueCommerce below average for product road map relevancy.
- **Enterprise appeal:** A majority of TrueCommerce's digital commerce customers are SMBs and in the lower midmarket, in terms of revenue. TrueCommerce Nexternal delivers strong value to customers of that size but isn't suited as well for enterprises that need to process a larger quantity of orders across dozens of geographies.

Consider TrueCommerce When

Consider TrueCommerce if you are an SMB or a midmarket company looking for a SaaS digital commerce platform that can support both B2B and B2C or you use TrueCommerce to accept orders via other channels such as EDI. Consider it if your organization is primarily focused on differentiating with business agility and fast time to market with a platform that is very business user-friendly.

Unilog

After a thorough evaluation of Unilog's strategies and capabilities, IDC has positioned the company in the Major Players category within this 2020 IDC MarketScape for B2B digital commerce platforms.

Unilog is a privately held vendor of digital commerce software and content enrichment services founded in 1998 and its North American headquarters is in Wayne, Pennsylvania, United States. The company's digital commerce product, Unilog CIMM2, is a SaaS B2B digital commerce platform with a pre-integrated PIM module. Quick facts about Unilog include:

- **Employees:** Over 820
- **Global reach:** Digital commerce customers with headquarters in over 6 countries
- **B2B industry focus:** B2B distributors, wholesalers, manufacturers, and retailers of specialty hard goods
- **Ideal customer size:** SMB to upper midmarket
- **Cloud:** Multitenant at the infrastructure, database, and application layers and available on Google Cloud Platform and Azure
- **Pricing model:** Subscription pricing model (three-year initial term) with additional implementation services provided in first year; no surplus charged for usage or seats; cloud hosting, support, and maintenance included in the core subscription fee
- **Largest customer:** Largest B2B digital commerce customers process over 43,000 orders annually on Unilog CIMM2

- **Partner ecosystem:** Has a few implementation partners and over five technology partners for B2B digital commerce
- **Interesting fact:** One of Unilog's customers experienced a cyberattack on its internal network and back-office systems. However, the customer was able to continue its business operations thanks to Unilog, since the CIMM2 eCommerce platform is hosted on Google Cloud Platform.

Strengths

- **Level of value delivered:** Customers we interviewed rated Unilog above average for the level of value delivered relative to the price paid for the commerce platform. On customer stated, "I am shocked with how much we are getting for what we're paying."
- **Product information focus:** Unilog provides a PIM offering in addition to CIMM2, allowing deeper functionality in terms of product data and content management.
- **ERP/point-of-sale (POS) integrations:** Unilog has put a lot of time and effort into connecting to various ERP and point-of-sale systems. This includes mapping out how information flows through those systems and tracking dependencies. Unilog asserts that these integrations are critical if you want to provide true omni-channel B2B commerce.

Challenges

- **Enterprise performance:** The target market for CIMM2 is in the SMB and midmarket space, which the product is well suited for. However, Unilog often does not check all the boxes for enterprises in terms of customizability and integrations with enterprise systems.
- **Small global footprint:** A vast majority of Unilog's current customer base is in North America and lacks a local customer support or partner presence in other regions.
- **Limited ecosystem:** Unilog has a limited partner ecosystem on both the technology and implementation sides and instead relies on in-house development to assist customers and build integrations. One customer stated that it would like to see more of a third-party ecosystem, including a preferred partner list or network.

Consider Unilog When

Consider Unilog if you are an SMB or a midmarket B2B organization looking for a SaaS digital commerce platform with strong B2B commerce capabilities, deep product information, and content functionality at a low price point. Consider it if your organization is primarily focused on differentiating with business agility and fast time to market with a platform that is very business user-friendly.

VTEX

After a thorough evaluation of VTEX's strategies and capabilities, IDC has positioned the company in the Major Players category within this 2020 IDC MarketScape for B2B digital commerce platforms.

VTEX is a privately held vendor of digital commerce software founded in 1999 and is headquartered in London, United Kingdom. The company's B2B digital commerce product, VTEX Commerce Cloud, is a cloud-native, SaaS pure-play digital commerce platform for both B2B and B2C. VTEX was originally founded in Brazil and maintained headquarters in the country up until the past five years. VTEX is built API-first and offers native order management and marketplace modules. Quick facts about VTEX include:

- **Employees:** Over 850
- **Global reach:** Digital commerce customers in over 50 countries

- **B2B industry focus:** Manufacturing, wholesale distribution, food and beverage, and pharma and cosmetics
- **Ideal customer size:** SMB to large enterprise
- **Cloud:** Multitenant at the infrastructure, database, and application layers and available on AWS
- **Pricing model:** A one-time setup fee, an annual subscription fee, and a shared success fee (a percentage of revenue or other order volume metric)
- **Largest customer:** Largest B2B digital commerce customers process over 170,000 orders annually on VTEX Commerce Cloud
- **Partner ecosystem:** Has over 400 implementation partners and over 100 technology partners for B2B digital commerce
- **Interesting fact:** VTEX powers over 200 marketplaces worldwide.

Strengths

- **Modern architecture:** VTEX is built with a modern, API-first, microservices-based architecture. In 2019, VTEX delivered over 12,000 updates to the VTEX Commerce Cloud platform.
- **Native marketplace and OMS:** VTEX calls itself a "collaborative commerce" provider, offering a marketplace module that allows merchants to operate their own online marketplace and sell across one another's online stores. Customers we interviewed expressed excitement in leveraging the marketplace model for growth.
- **Implementation experience:** Customers we interviewed rated VTEX above average for their implementation experience.

Challenges

- **VTEX IO refinement:** VTEX launched VTEX IO, a low-code development framework designed to accelerate the delivery of commerce experiences, in 2019. While customers commented that it is a major improvement overall, they also said the new development environment needs to be further polished in areas such as developer documentation.
- **User interface:** Customers we interviewed rated VTEX below average for the platform's user interface. VTEX is in the process of rebuilding its user interface and administration tools.
- **Going global:** Originally based in Brazil, VTEX holds a strong market share among Latin American merchants. However, VTEX has weaker brand recognition and penetration in other geographies and is currently expanding and gaining momentum in the United States.

Consider VTEX When

Consider VTEX if you are a company of any size looking for a SaaS digital commerce platform that can support both B2B and B2C or you want the ability to build two-sided marketplaces. Consider it if your organization is primarily focused on differentiating with technological agility and adapting to change with a platform that has a modern cloud architecture.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

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

For this IDC MarketScape, vendor size was determined by IDC's 2020 Software Tracker and estimates for each vendor's revenue specifically for B2B digital commerce application sales. B2B revenue did not count toward vendors' marker size. For more details on digital commerce applications market shares, see *Worldwide Digital Commerce Applications Market Shares, 2019: Headless Commerce Goes Mainstream* (IDC #US45243220, June 2020).

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.
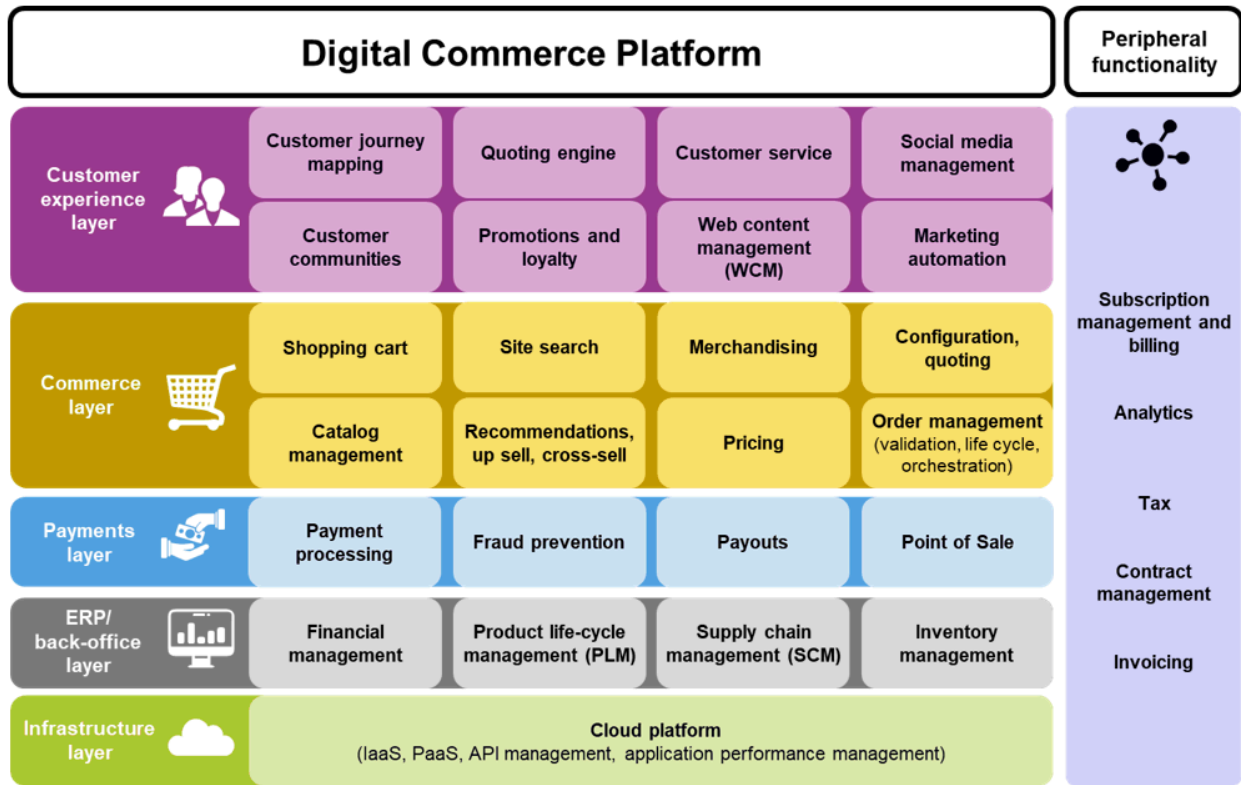
Market Definition

IDC defines digital commerce platforms as software systems that enable businesses to create an online "store" for selling products and services. The key role of digital commerce applications is to embed commerce functions across numerous digital channels, help customers find products and services, and manage orders from the time a transaction is placed through order fulfillment. Specific functions that digital commerce applications provide include catalog management, lightweight product information management, pricing, merchandising, transaction processing, order life-cycle management, digital fulfillment, and site search.

Figure 3 depicts the functionality that a comprehensive digital commerce platform must have. This IDC MarketScape looks primarily at the commerce layer, but most organizations need a comprehensive platform to perform in the digital economy.

FIGURE 3

IDC's Vision of a Comprehensive Digital Commerce Platform

Note: Functionalities represented in in the figure are not exclusive to a single "layer."

Source: IDC, 2020

Digital Commerce Customer Size Segment Definitions

For the purposes of this IDC MarketScape, IDC uses the organization size definitions mentioned in Table 1.

TABLE 1

B2B Digital Commerce Customer Organization Size Segments

Segment	Revenue
SMB	Under $100 million
Lower midmarket	$100 million to $499 million
Upper midmarket	$500 million to $1 billion
Enterprise	Over $1 billion

Source: IDC, 2020

Strategies and Capabilities Criteria

Tables 2 and 3 provide key strategy and capability measures, respectively, for the success of B2B digital commerce platform vendors.

TABLE 2

Key Strategy Measures for Success: Worldwide B2B Digital Commerce Platforms

Strategies Criteria	Definition	Weight (%)
Customer delivery strategy	▪ Customers can easily upgrade between major releases of the application. ▪ The product road map is relevant to customers. ▪ The product road map is clearly communicated to customers. ▪ Customers believe the vendor is setting them up for future success in the digital economy. ▪ Customers perceive the vendor's efforts in AI/automation as valuable.	25.00
Functionality of offering road map	▪ UX, architecture, reporting, personalization, mobile commerce, headless commerce, and industry-specific functionality are all addressed on the B2B commerce road map. ▪ The vendor has plans to include advanced capabilities in its road map from the advanced B2B functionality criterion (refer to Table 3).	17.00
Architecture/platform strategy	▪ The vendor has a strong strategy to improve its application's architecture/extensibility, including APIs, developer community, microservices, and integrations.	10.00
Innovation	▪ The vendor has plans to incorporate AI, AR/VR, IoT, and other advanced technologies.	10.00
Cloud strategy	▪ The vendor has a strategy to maintain a cloud-native platform. Multitenancy is planned for at the application, database, and infrastructure layers. A strong cloud road map is planned.	6.00
R&D pace and productivity	▪ The vendor invests heavily in product R&D, either directly or via acquisitions.	6.00
Growth	▪ The vendor is often seen in B2B digital commerce deals and has posted strong growth among B2B merchants. ▪ The vendor's partner network is expanding and maturing. ▪ The vendor has programs in place to support ongoing customer success. ▪ The vendor actively expands the customer base outside of the home market. ▪ The vendor is adequately capitalized to ensure long-term viability.	26.00
Total		100.00

Source: IDC, 2020

TABLE 3

Key Capability Measures for Success: Worldwide B2B Digital Commerce Platforms

Capabilities Criteria	Definition	Weight (%)
Functionality or offering	▪ The application supports granular catalog management functions and a deep product taxonomy for commerce. Product pages can contain numerous attributes and third-party product information. ▪ The application provides core order management functionality including order capture, orchestration, life-cycle management, and fulfillment. ▪ The application has flexible reporting and analytics functionality that meets the needs of most customers out of the box. ▪ Search engine optimization (SEO) tools are available to customers, and SEO is built into the digital commerce platform. ▪ The application provides advanced shopping cart functionality. ▪ The application has navigation and search tools out of the box, enabling powerful navigation for end users. ▪ The application provides basic web content management capabilities. ▪ The application includes granular workflow/task management capabilities.	15.00
Advanced functionality	▪ The application provides native A/B and multivariate testing capabilities. ▪ The application supports many third-party payment providers specific to B2B out of the box or supports strong native payments. ▪ The application can automate price changes by dynamically adjusting product prices based on real-time changes in supply and demand and competitor prices. ▪ The application supports the ability to build a B2B marketplace and sell across external marketplaces. ▪ The application supports the ability to personalize product pages/recommendations/checkout options based on customer profiles. ▪ The application enables B2B customers to configure products and/or services. ▪ The application supports flexible permission workflows for buyer accounts including spending limits, approvals, and notifications. ▪ The application provides advanced B2B promotion functionality. ▪ Buyers can request quotes for products and services.	21.00

TABLE 3

Key Capability Measures for Success: Worldwide B2B Digital Commerce Platforms

Capabilities Criteria	Definition	Weight (%)
Architecture	- The application is built API-first, with modern API standards, and the vendor has taken steps to make the ecosystem more attractive for developers. - It is easy to customize/configure the application. - The application is built with a modular architecture. - Users can easily adopt new releases without migration efforts. The application and APIs are backward compatible.	12.00
3rd Platform capabilities	- The application has application layer encryption and security measures are embedded. - The application has embedded artificial intelligence capabilities that assist users by automating tasks and improving decision making. - Shopping experiences are designed to be mobile first. The vendor provides tools to build progressive web applications for commerce.	7.00
Range of services	- The vendor has an active ecosystem of developers for B2B commerce and has taken steps to make the ecosystem more attractive for developers. - The vendor supports customers and end users across the world. - The vendor provides functionality to serve specific B2B verticals. - The vendor supports a wide range of out-of-the-box integrations and/or integration services specifically for B2B. - The vendor has a large ecosystem of implementation and technology partners.	12.00
Cloud capabilities	- The vendor provides flexible pricing and contract terms to fit B2B customers' needs. - Customers can deploy on the public cloud of their choice. - Applications are multitenant at the application, database, and infrastructure layers. The vendor has a cloud-first strategy. - The vendor pushes updates to customers regularly. - A high uptime is guaranteed in SLAs.	8.00

TABLE 3

Key Capability Measures for Success: Worldwide B2B Digital Commerce Platforms

Capabilities Criteria	Definition	Weight (%)
Customer satisfaction	▪ Customers believe the application supports their specific B2B needs with minor customization. ▪ Customers receive good value relative to the price paid for the application. ▪ Customers believe that the application is easy and intuitive to use. ▪ Customers see strong performance on the B2B commerce platform in terms of responsiveness and uptime. ▪ The application is easy to implement, according to customers. ▪ It is easy to integrate the application with external systems (order management, CRM, inventory management, etc.), according to customers.	21.00
Customer service delivery	▪ The vendor is able to solve customer service issues and keep customers happy.	4.00
Total		100.00

Source: IDC, 2020

LEARN MORE

Related Research

- *IDC MarketScape: Worldwide B2C Digital Commerce Platforms 2020 Vendor Assessment* (IDC #US45741420, forthcoming)
- *Worldwide Digital Commerce Applications Forecast, 2020-2024* (IDC #US45243320, June 2020)
- *Worldwide Digital Commerce Applications Market Shares, 2019: Headless Commerce Goes Mainstream* (IDC #US45243220, June 2020)
- *IDC Market Glance: Digital Commerce Software, 1Q20* (IDC #US46151020, March 2020)
- *The Future of Commerce Is Autonomous* (IDC #US45687019, December 2019)
- *Market Analysis Perspective: Worldwide Digital Commerce Software, 2019* (IDC #US44644419, September 2019)

Synopsis

This IDC study provides an assessment of the principal B2B digital commerce platforms and discusses what criteria are most important for companies to consider when selecting a digital commerce platform system.

"Selecting the right cloud B2B digital commerce platform can be extremely hard; there isn't a one-size-fits-all vendor, and the market is evolving extremely fast," says Jordan Jewell, research manager, Digital Commerce program at IDC. "With each passing year, digital commerce makes up a bigger share of all transactions and technology buyers need to envision what they want their commerce operations to look like in five-plus years and design the digital commerce platform backward from there. The right B2B digital commerce software vendor must provide you with a competitive advantage in areas including business agility, customizability, experience management (content), and technology agility while also supporting sales across many geographies and industries. The platform must also be architected to support substantial commerce business model changes in the years to come."

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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