

# Magic Quadrant pour le commerce numérique

6 novembre 2024 - ID G00801151 - 52 min de lecture

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Le chiffre d'affaires du marché des plateformes de commerce numérique a augmenté de 11,5 % en 2023 pour atteindre 8,9 milliards de dollars. Bien qu'en deçà des taux dus à la pandémie, la croissance est stable et Gartner prévoit une augmentation entre 2024 et 2025. Ce Magic Quadrant évalue 19 fournisseurs de commerce numérique pour aider les responsables d'applications à prendre des décisions éclairées.

## Hypothèse de planification stratégique

D'ici 2026, 30 % des cycles de vente B2B seront gérés via des salles de vente digitales, qui serviront ensuite à gérer le cycle de vie du client.

## Définition/Description du marché

Gartner définit le commerce numérique comme la technologie qui permet aux clients d'acheter des biens et des services via une expérience interactive et en libre-service ou assistée. La plateforme fournit les informations nécessaires aux clients pour prendre leurs décisions d'achat et utilise des règles et des données pour présenter les commandes entièrement tarifées pour le paiement. Le produit de commerce doit prendre en charge l'interopérabilité avec les données client, le contenu du produit (par exemple, le prix, la disponibilité) et les fonctionnalités et données de commande via des API. Le commerce numérique est généralement fourni sous forme de SaaS à locataire unique ou multilocataire, ou sous forme d'applications hébergées à locataire unique ou hébergées gérées (PaaS). Il peut être proposé pour des implémentations sur site dans certaines circonstances.

Le commerce numérique permet aux clients d'acheter des biens et des services via une expérience interactive, en libre-service ou assistée, en fournissant les informations nécessaires aux clients pour prendre des décisions d'achat.

## Caractéristiques obligatoires

Les fonctionnalités indispensables pour ce marché incluent la capacité prête à l'emploi (OOTB) ou les API pour prendre en charge :

- Une expérience commerciale interactive en libre-service qui comprend des vitrines, la navigation dans le catalogue de produits, la recherche, les pages de produits, les promotions,

les paniers d'achat, le paiement et les comptes clients



- Découvrir des produits, ajouter des produits à un panier et fixer le prix complet d'une commande, y compris les remises ou promotions au niveau du produit, du client et de la commande
- Outils commerciaux pour le merchandising du site (y compris la recherche et la navigation), le catalogue de produits et la gestion du contenu, la gestion des accès des utilisateurs, la gestion des promotions et les opérations et configurations du site
- Interopérabilité avec le client, le contenu du produit (y compris le prix et la disponibilité) et les fonctionnalités et données de commande via des API
- Composition du front-end en tant que service/expérience
- Personnalisation, tests et optimisation
- Informations sur les produits, tarification et gestion des stocks et/ou intégration

### **Caractéristiques communes**

Le commerce numérique peut également avoir les capacités suivantes :

- Capacités axées sur le B2B
- Orchestration et gestion des API
- Opérations de marché
- Intégrations de chaînes
- Gestion de contenu
- B2B2X
- Centre de contact de base
- Gestion des informations de base sur les produits
- OMS de base
- Configuration de base, prix et devis
- CDP de base
- Gestion des abonnements de base
- Commerce de détail unifié (par exemple, achat en ligne, retrait en magasin/cliquer et collecter, clientèle, expédition depuis le magasin)

- Commerce en direct
- Intégration des associés aux ventes
- Configuration visuelle



(Pour plus d'informations sur l'étendue de l'écosystème du commerce numérique, voir [Evolve Digital Commerce Portfolios by Leveraging the Application Ecosystem](#).)

## Quadrant magique

Figure 1 : Magic Quadrant pour le commerce numérique



### Points forts et précautions du fournisseur

#### Adobe

Adobe est un leader dans ce Magic Quadrant. Sa plateforme Adobe Commerce peut être déployée sur site ou dans des clouds publics (avec ou sans services gérés par Adobe) et est disponible dans le monde entier sur Amazon Web Services (AWS) ou Microsoft Azure. Elle dessert de

nombreux secteurs, avec une forte concentration dans la fabrication et la vente au détail, suivies par les télécommunications, la technologie et les sciences de la vie. Elle évolue activement vers le haut de gamme, engageant des entreprises dont le chiffre d'affaires dépasse 250 millions de dollars. La tarification est basée sur un tarif forfaitaire et échelonnée en fonction de la valeur brute des marchandises (GMV) et de la valeur moyenne des commandes (AOV), avec une tarification basée sur la commande disponible. D'autres services complémentaires sont basés sur l'utilisation. La plateforme peut être particulièrement adaptée aux clients Adobe existants en raison de l'intégration native avec la suite Adobe plus large.

### **Points forts**

- **Synergie de la suite de produits** : Adobe offre une expérience client transparente et personnalisée dans l'ensemble de son portefeuille de produits, notamment Adobe Sensei, Adobe Experience Manager Sites, Adobe Analytics, Adobe Target, Adobe Real-Time CDP et Amazon Sales Channel.
- **Fonctionnalités de commerce de base (B2C)** : Adobe Commerce dispose de riches fonctionnalités de commerce de base (B2C), notamment dans les domaines de la gestion des rôles, de la gestion des catalogues, de la gestion du contenu marketing, de la recherche et de la personnalisation.
- **Adobe Edge Delivery Services** : Le nouveau front-end as a service (FEaaS), délivré à partir d'une architecture edge sans serveur, rivalise avec les pure players, comme Netlify et Vercel, avec l'avantage d'être nativement intégré aux plateformes de commerce et d'expérience numérique (DXP).

### **Précautions**

- **Suite play** : l'accent mis récemment par Adobe sur l'intégration d'Adobe Commerce à sa suite de produits plus large, qui se vend traditionnellement à des prix plus élevés à des clients plus importants, peut ne pas intéresser les utilisateurs actuels ou les prospects qui composent à partir des meilleures solutions.
- **Mise à niveau** : les mises à niveau peuvent s'avérer difficiles pour les clients existants. Adobe fournit un outil de compatibilité des mises à niveau, et les prospects doivent examiner les conseils de bonnes pratiques d'Adobe pour minimiser les défis de mise à niveau avant d'acheter. De plus, Adobe a introduit Adobe Developer App Builder en 2022 pour créer et étendre la plateforme de manière à ce qu'elle soit sécurisée en cas de mise à niveau.
- **Potential cost of managed services**: Its "cloud" offerings are not true SaaS and require a full-stack development team to manage. Customers should account for additional expenses, such as maintenance and upgrades, which may not be obvious.

### **BigCommerce**

BigCommerce is a Challenger in this Magic Quadrant. BigCommerce is a multitenant SaaS hosted on Google Cloud Platform. The majority of BigCommerce's existing customers are in the retail vertical and have a GMV of less than \$10 million, but BigCommerce now also targets midmarket

B2B customers. Pricing has four tiers, and the Enterprise tier is aimed at organizations with digital GMV of over \$1 million. Pricing is also based on the number of orders and AOV, which caters to the needs of B2B organizations. BigCommerce may be particularly suited to midmarket companies seeking flexibility, because of its platform's composability and modern architecture.



### **Strengths**

- **Functionality advancements:** In 2023, BigCommerce advanced its platform with functionality improvements in areas such as buy online and pickup in store, multistorefront, B2B buying and invoicing, and generative AI applications.
- **Application ecosystem:** BigCommerce offers a wide range of preintegrated third-party applications in an array of categories, including frontend technologies such as content management system (CMS), DXP and search, as well as back-office applications such as ERP, product information management (PIM) point of sale (POS) and order management system (OMS).
- **Composable architecture:** BigCommerce offers a modern modular, API-first, cloud-native, head-decoupled (or "MACH"-based) architecture with demonstrated client use cases in which portions of the platform have been augmented through extension via development and/or composed alongside third-party integrations.

### **Cautions**

- **Geographic and industry presence:** BigCommerce primarily serves North American and increasingly, European retail customers, with limited presence in other regions and industries. Prospects in other areas should check with reference customers for suitability.
- **Large enterprise functionality:** Some of BigCommerce's out-of-the-box (OOTB) features, such as catalog management, search merchandising and personalization may require third-party integrations to serve the complexity needs of large enterprises.
- **Business user UI:** Some applications in the BigCommerce portfolio are not fully integrated to the core commerce admin console. Feedonomics is separate, newly acquired Makeswift is not fully integrated for native storefront visual page-building, and the B2B Edition has a partially separate UI.

### **commercetools**

commercetools is a Leader in this Magic Quadrant. It is multitenant SaaS and deployed on Google Cloud Platform, AWS or Microsoft Azure. Core commerce products include B2B, B2C, Frontend and other functional add-ons. commercetools serves many industries, primarily retail, manufacturing, wholesale, life sciences and healthcare. commercetools serves large global organizations, many with GMV over \$250 million. commercetools has a strong presence in Europe and North America, as well as a small base in Latin America and Asia/Pacific, including China. Pricing is based on order volume, GMV, SKUs and storefronts, with options for order volume and functional modules. commercetools may be particularly suited to larger, digitally mature enterprises because of its modular, scalable offerings.

## Strengths

- **Large-enterprise focus:** commercetools' customer base is geared toward large enterprises that operate various product lines in multiple regions with annual GMVs over \$250 million. This strategy allows it to tailor its solution to complex, high-volume business needs.
- **Viability:** Compared to other vendors in this research, commercetools had one of the highest customer growth rates in 2023. This expansion underscores the continuing appeal and adoption of its platform.
- **Composability:** With a modular architecture, a decoupled front end, extensive APIs and a flexible data model, commercetools enables composition, extensibility and scalability. Its Frontend product affords customers options for implementing the storefront using native (B2C and B2B), third-party or custom-built solutions.

## Cautions


- **Implementation complexity:** commercetool's product is designed to support complex customers and digital solutions, and end-to-end implementation complexity requires high IT maturity. SMB and midmarket clients (under \$100 million online GMV) may prefer more packaged solutions with a potentially lower total cost of ownership (TCO).
- **Global presence:** Most of commercetool's growth in 2023 came from the North American and European markets, with negligible expansion in other regions, limiting its global reach and market awareness.
- **AI and personalization:** commercetools relies on third-party applications for advanced AI features, like AI-based personalization, semantic/natural language processing (NLP) search and product content generation, rather than investing in these capabilities internally.

## Elastic Path

Elastic Path is a Niche Player in this Magic Quadrant. It offers two platforms: Self-Managed Commerce, which is self-hosting, and Composable Commerce, which is a multitenant SaaS platform hosted on AWS in North America and EMEA. Elastic Path primarily serves clients in the high-technology and IT, manufacturing and retail verticals based in North America. It mostly sells to midsize organizations with an annual GMV of less than \$50 million, but it has some larger customers. Pricing is based on GMV or order numbers. Elastic Path may be particularly suited to organizations seeking modular, composable solutions for storefront, product catalog management and core commerce features.

## Strengths

- **Product modularity:** Elastic Path's separately consumable modules for core commerce, storefront, product catalog and subscriptions are rare in the market. Its product catalog offering, Product Experience Manager, offers advanced functionality for managing and segmenting products.

- **Storefront capabilities:** Elastic Path has two storefront offerings. Studio is based on its acquisition of Unstack in 2023. This decoupled storefront is for simpler use cases and includes  a visual builder. It also offers native form integration and optimization. Composable Frontend is built in Next.js and is intended for organizations that need to manually manage and customize their storefront.
- **Developer-friendly:** Elastic Path offers robust documentation and API support, including a new developer resource center with extensive sample code and API-testing capabilities. This feature can accelerate development and solution implementation.

### **Cautions**


- **Core capabilities:** Elastic Path requires partnership with third-party vendors for sophisticated capabilities in areas such as search and recommendations. Roles, permissions and native unified retail commerce functionality lag those of leading platforms, which can affect user experience and use-case breadth.
- **Vendor awareness:** In Gartner client inquiries, Elastic Path is rarely mentioned and is not gaining traction in client shortlists. This lack of familiarity can indicate limited market awareness and adoption.
- **B2B functionality:** Composable Commerce is missing some essential B2B functionality, such as requests for quotes (RFQ), B2B approval workflows and role-based configuration for buyers.

### **HCLSoftware**

HCLSoftware is a Visionary in this Magic Quadrant. HCL Commerce Cloud is a hybrid single-tenant and multitenant SaaS platform on AWS, Microsoft Azure and Google Cloud Platform marketplaces, with single-tenant components managed by HCLSoftware or its clients. It supports larger companies in a diverse set of industries, with the most common being retail, manufacturing and telecom companies. Customers are primarily in North America and Europe, with a smaller number in Asia/Pacific and Latin America. Pricing is based on a combination of order lines and peak order lines per hour. In 2022, HCLTech, the parent company of HCLSoftware, acquired Quest Informatics (now HCL Aftermarket Cloud) for vertical acceleration in spare parts verticals. HCLSoftware may be particularly suited to global organizations with complex requirements.

### **Strengths**

- **Bundled composability:** HCLSoftware's platform offers extensive native functionality and several bundled applications that are self-contained and modular. Its base license cost includes decoupled ("headless") storefronts for both B2C and B2B, a customer data platform (CDP), visual page composer, catalog ingestion tool, customer service hub and a marketplace operation application.
- **Scalability:** The platform can support companies with more than \$10 billion in annual GMV. Each release is benchmarked to handle 100,000 orders per hour, and some customers exceed that threshold.

- **Industry accelerators:** HCLSoftware is among the few vendors in this research that offers a wide range of digital commerce accelerators for multiple industry verticals, such as automotive, heavy industrial, telecom, raw materials and rental business. 

### **Cautions**

- **Application ecosystem:** Compared to its direct competitors, HCLSoftware has limited prebuilt integrations, such as for third-party logistics, analytics and DXPs, potentially requiring more time and resources for custom integrations.
- **Market presence:** Despite maintaining a base of large customers, HCLSoftware's customer growth has lagged its direct competitors. Given its small market presence, customers should check that solution integrators have product experience and that the required integrations exist.
- **Business user experience:** HCLSoftware's business user admin consoles can be complex and nonintuitive. It requires customers to use multiple UIs for common tasks, such as catalog ingestion, page setup and ordering on behalf of customers, which can lead to a higher learning curve for first-time users.

### **Infosys Equinox**

Infosys Equinox is a Niche Player in this Magic Quadrant. Infosys Equinox has a modern architecture with over 25 modules independently deployable as multitenant SaaS offerings on any public cloud and also available on the AWS and Microsoft Azure marketplaces. In addition, Infosys Equinox is available as a hosted single-tenant offering with managed services, or on-premises. Add-ons include a low-code page builder, a personalization platform and conversational commerce. Serving industries such as retail, manufacturing, media and Teleco, Infosys typically serves larger organizations with over \$250 million GMV. Pricing is based on consumption of individual microservices; the entire platform is fixed-fee, subscription or GMV revenue-share. Infosys Equinox may be particularly suited to larger global retailers because of its sophistication and flexible, composable solution.

### **Strengths**

- **End-to-end approach:** Infosys Equinox offers an end-to-end solution for digital commerce in one contract, supporting applications, customization, implementation, hosting, operations and support services.
- **Core commerce functionality:** Infosys Equinox offers advanced role management, pricing, promotions, subscriptions, loyalty and merchandising. Its API-enabled React-based storefront connects to third-party headless CMS solutions. Add-ons like augmented reality (AR)/virtual reality, Genome Solution (CDP and analytics), virtual closet and NLP-based search cater to online retailers.
- **Modern composable architecture:** Infosys Equinox' API-first, headless architecture provides flexibility for enterprise customers. Modules can be deployed individually or as a complete platform, each with its own backend tooling and data layer and access control.



## Cautions

- **Limited system integration partners:** Infosys Equinox has limited options for clients seeking to engage with systems integrators other than Infosys itself.
- **Digital commerce operational presence:** Infosys Equinox has a small operational presence in North America and Europe, with most platform development operations in India. Client-facing, platform leadership and business operations teams are in multiple markets. Data centers are in the eastern and western U.S., Ireland and India. Clients needing a broader global presence may need a partner.
- **Cost of advanced capabilities:** Capabilities such as AI-based personalization require purchase of the Infosys Customer Intelligence Platform or integration with a third party platform. Being a headless platform, customers may also need third-party content management capabilities.

## Kibo

Kibo is a Challenger in this Magic Quadrant. Kibo's Composable Commerce Platform is a multitenant SaaS hosted on AWS or Google Cloud Platform with B2B/B2C commerce, order management and subscription commerce, sold separately or together. Kibo serves customers of all sizes, primarily in the North American retail industry, with some presence in Europe. It also has customers in manufacturing, distribution, life sciences and healthcare. Kibo's core commerce platform offers four packages with increasing functionality: starter, essentials, advanced and complete (which includes POS and personalization). Annual pricing is based on order lines. Kibo may be particularly suited to retailers due to its core commerce, OMS and subscription modules for unifying online and in-store services.

## Strengths

- **Business models:** Kibo supports B2C and B2B, excelling in B2C unified commerce with integrated OMS, subscriptions and OEM partnerships, like Monetate for personalization. It enables B2B processes via an integrated workflow engine, supporting organizations operating B2C and B2B on a common platform.
- **End-to-end platform:** Kibo offers add-ons for search and product discovery, CMS, PIM, POS, OMS, digital asset management (DAM), clienteling, call center and customer service, and subscription selling, all natively integrated. It embeds third-party analytics and personalization engines at no extra cost.
- **Customer support:** Kibo provides service during implementation and offers two support tiers: standard and premium (at additional charge). The premium model includes a dedicated technical account manager and enablement engineer.

## Cautions

- **Global reach:** Kibo continues to exhibit low expansion outside its core region, with few new customers outside North America and Europe. Its implementation partners network is one of the smallest compared to other vendors in this research, which could inhibit growth. Organizations in other regions should evaluate its ability to support target areas.

- **Vertical emphasis:** While Kibo supports both B2C and B2B, most customers are in retail, manufacturing, wholesale and distribution. Prospects outside these areas should consult reference customers to assess suitability.
- **Native personalization:** Kibo offers integrated personalization only as part of its eCommerce Complete package via a partnership with Monetate. Other platform packages provide only limited native personalization capabilities. Personalization is critical to digital commerce success in terms of customer experience and revenue growth, so prospects must determine whether personalization capabilities in the package align with requirements.



## **Liferay**

Liferay is a new entrant and Niche Player in this Magic Quadrant. Liferay Commerce is a native module of Liferay DXP, available in multitenant SaaS for simpler use cases, platform as a service (PaaS), or on-premises. Cloud versions are available on Google Cloud Platform globally. Liferay focuses on small- to midtier B2B organizations (under \$100 million GVM) in manufacturing and services. Pricing has three tiers, Pro, Business and Enterprise, with a flat-fee per tier and for SaaS, also based on page views and active users. Add-ons at extra cost include productized connectors, product recommendations and sales forecasting modules. Liferay may be particularly suited to organizations seeking to build customer portals with digital commerce due to its established DXP foundation and native low-code application platform (LCAP).

## **Strengths**

- **Established DXP foundation:** Liferay is a mature DXP with global customers and availability, giving its relatively new digital commerce module a kick-start with an established user community and partner base. This foundation can indicate a level of reliability and trust already in place.
- **Globalization:** For multicountry and multibrand B2B, Liferay has strong capabilities with flexible inheritance of all main entities, such as products, workflows, promotions and merchandising rules. Such flexibility can support global multistorefront operations effectively.
- **Integration and extension:** Liferay offers native DXP capabilities, including CMS and productized connectors to CRMs, ERPs and OMS. Uniquely, it includes a lightweight LCAP for custom integrations, enhancing system compatibility.

## **Cautions**

- **Innovation and ecosystem:** Liferay is partnering with Google for some generative AI capabilities. Yet, as a relatively new vendor to digital commerce, Liferay has focused most of its development on building core capabilities, and it lacks an established ecosystem of partner independent software vendors (ISVs).
- **Customer experience services:** Liferay's open-source, community-led heritage means some of the more commercially expected aspects of customer experience (CX) are missing, such as a site readiness check and a customer advisory board.

- **Architecture:** Rooted in an enterprise Java background, Liferay continues to deploy as a modular monolith with few truly modular components or cloud-native SaaS services. While this may suit traditional in-house development teams, it lacks the deployment agility and flexibility of a more modular, composable approach.



## **Optimizely**

Optimizely is a Niche Player in this Magic Quadrant. Optimizely offers Commerce Connect (not covered in this research) and Configured Commerce, deployed as single-tenant SaaS on Microsoft Azure (covered in this research). It is available stand-alone or bundled with Optimizely One DXP, PIM, DAM, CMP, CMS, Personalization, Web Experimentation and/or CDP. Optimizely serves many industries, especially manufacturing, wholesale and distribution. Customers are mostly in EMEA and North America and are midmarket and smaller B2B companies with \$50 to \$250 million annual GMV. Pricing is based on transaction volume and DXP component add-ons for advanced use. Optimizely may be particularly suited to organizations seeking a broad suite of DXPs and commerce capabilities from a single vendor.

### **Strengths**

- **Marketer focus:** It primarily targets the marketing function, and Configured Commerce is often integrated into the Optimizely One platform. It offers “freemium” basic capabilities for all DXP capabilities, except Optimizely CMS and mobile app, in the core commerce licensing cost.
- **Midmarket B2B emphasis:** Optimizely provides a packaged solution for clients mainly in core B2B verticals, such as distribution, manufacturing and wholesale, and with annual online GMVs ranging from \$50 million upward.
- **CMS-centric commerce package:** Enterprise clients using Optimizely’s flagship DXP often choose Configured Commerce as their digital commerce platform for its preintegrated capabilities, such as headless content management for its React-based storefront, and enhanced search and product discovery. Configured Commerce can also be used with any third-party CMS or frontend solution.

### **Cautions**

- **Suite-based proposition:** While some customers prefer a single-vendor solution, there is a strong buying trend toward best-of-breed, modular, composable approaches. Optimizely’s commerce solution is modular and integrated within the Optimizely One suite. However, the range of preintegrated third-party plug-ins and connectors remains lower than others in this research and varies in depth across the suite.
- **Vendor expansion:** In 2023, Optimizely’s Configured Commerce recorded slower growth compared to other vendors in this research. Slow growth may indicate challenges in its go-to-market strategy, lack of awareness outside its core region and low market adoption.
- **Geographical presence:** The majority of Optimizely’s partners and clients are based in North America, followed by Europe, with minimal presence in other regions. This lack of geographical diversity could be a concern to prospects seeking robust global support.

Oro is a Visionary in this Magic Quadrant. OroCommerce is a single-tenant SaaS platform available globally and deployable on OroCloud (PaaS), public clouds, private clouds and on-premises. Oro serves distribution, manufacturing and wholesale verticals, with some presence in automotive and high tech. The majority of its customers are midsize organizations with an annual GMV of less than \$250 million, although a few exceed \$1 billion. Pricing is based on GMV tiers with thresholds for users, SKUs, pageviews and orders. Oro may be particularly suited to B2B organizations seeking multiple use cases, such as direct to consumer (D2C), B2B2X and marketplace operations, because of its broad business model support and native CRM capability.

### **Strengths**


- **B2B capabilities:** Oro supports complex catalogs and workflows for multistorefront, multigeographical and large-scale deployments. It embeds sales associate business processes, such as RFQs, order on behalf and customer communications, with a flexible visual workflow engine and granular permission controls.
- **All-in-one pricing:** Its pricing includes all functionality in OroCommerce and OroCRM, including a built-in storefront, CMS, DAM, OMS and marketplace operations. This strategy makes it cost-competitive for a full-suite commerce solution.
- **Innovation:** Oro offers unique features, like configurable dashboards with rule-based widgets, and shows cost and margin insights for quotes. It is also piloting generative AI functionalities, such as buyer agents and file-to-order capabilities.

### **Cautions**

- **Application ecosystem:** Oro offers rich OOTB functionality, but very few integrations to third-party applications beyond ERP and payment processing. Its tech partner ecosystem is one of the smallest among vendors in this research.
- **Market awareness:** Oro had relatively low customer and revenue growth in 2023, partly due to its limited geographic presence, which is mostly in North America and EMEA. In Gartner inquiries, this vendor is rarely known and not frequently making client shortlists, which can suggest limited market awareness, interest and adoption.
- **Monolithic core:** While Oro supports headless deployment, it lacks a decoupled storefront or headless CMS, requiring third-party solutions. OroCommerce is a modular monolith that must be deployed and scaled as one rather than by module.

### **Salesforce**

Salesforce is a Leader in this Magic Quadrant. Salesforce has three multitenant SaaS products. B2C Commerce is for large-scale consumer sales and is mainly used by clients in retail or wholesale. B2B Commerce is for B2B sales and is mainly used by clients in manufacturing or wholesale. D2C Commerce is for smaller-scale, D2C sales. Pricing models are based on annual

percentage of GMV or number of orders, plus add-on modules, such as the packaged payment solution. Salesforce clients are midsize and enterprise organizations (B2B and D2C), large enterprises (B2C), and span many geographies and industries. The products may be particularly suited to existing Salesforce clients due to native integration with other Salesforce offerings. 

### **Strengths**

- **Industry and geography coverage:** Salesforce's broad, global footprint provides extensive support to its customers, partners and solution integrators. It offers a robust set of industry accelerators and compliance certifications, making it appropriate for many digital commerce use cases.
- **Functionality breadth:** Across three platforms, Salesforce offers comprehensive functionalities for an array of business models. Gartner Peer Insights evaluations indicate high degrees of customer appreciation for product capabilities and B2B support.
- **Headless enablement for B2C:** Salesforce offers phased headless rollout capabilities, allowing clients to shift from older native storefronts to the Composable Storefront progressive web app (PWA), even one page type at a time, which helps ensure a lower-risk, incremental modernization.

### **Cautions**

- **Composability:** The core commerce engine, especially for B2C Commerce, is monolithic. Salesforce received below-average evaluations in Gartner Peer Insights reviews for composability, and Gartner client inquiry indicates frustration with this limitation.
- **Additional licenses:** Customers may need to purchase additional licenses for commerce functions other vendors offer OOTB. For example, some platform editions require OMS licenses to use Salesforce's BOPIS capability, and Salesforce Sales Cloud licenses are required for B2B quoting.
- **B2C architecture:** Salesforce's B2C Commerce Cloud uses a core technology stack that was not built on its platform and is transitioning as it develops its native shared services. B2C customers already need to decide whether or when to adopt new shared capabilities.

### **Sana Commerce**

Sana Commerce is a Niche Player in this Magic Quadrant. Its B2B platform Sana Commerce Cloud can be self-hosted on a public cloud but is often deployed as a single-tenant SaaS application on Microsoft Azure. It offers Sana Pay, a native payment platform optimized for B2B, in its licensing cost. Users can add an advanced version, Sana Pay+, and an analytics tool, Sana Commerce Insights, for a fee. Sana Commerce primarily serves midtier B2B distributors, wholesalers and manufacturers with Microsoft or SAP ERP applications in Europe and North America. Its pricing has three tiers, each fixed-fee plus a GMV rate. Sana may be particularly suited to organizations whose ERP is the main source of customer, product and pricing information, and business rules due to its deep ERP integrations.

## Strengths

- **B2B sales focus:** Sana's core strength has been its ERP-first integration approach, with prebuilt native ERP extensions and connectors for real-time data synchronization. It has shifted toward a B2B sales-function-oriented approach, extending its platform to cover CRM and OMS integrations and wider B2B use cases.
- **ISV integrations:** Sana supports over 100 prebuilt integrations on its cloud infrastructure, with a dedicated team certifying and updating plug-ins, lowering the risk of such integrations.
- **Native procurement integration:** In 2023, Sana introduced Punchout for two-way integration with procurement platforms, unlike most vendors that rely on third-party integrations. This addition makes Sana a strong consideration for organizations with procurement-oriented customers.

## Cautions

- **Vertical coverage:** Sana's customers are mostly in industrial manufacturing, with a few in transportation. Customers in other verticals should seek validation that this vendor can understand and accommodate their requirements.
- **Vendor size:** Sana is growing above the market average, but from a relatively small base due to its focus within manufacturing sectors. It is smaller than most vendors in this research. and may be more exposed to market volatility.
- **Workflow management:** Sana's B2B workflow engine is basic and lacks capabilities to manage or build workflows. It offers a simple order approval workflow, but it is not configurable or extensible by customers.

## SAP

SAP is a Leader in this Magic Quadrant. SAP Commerce Cloud includes a hybrid single-tenant PaaS platform, hosted on Microsoft Azure, and multitenant SaaS components, such as search and merchandising, order management, payments and product recommendation. Available in all regions globally, SAP Commerce Cloud serves many verticals but targets retail, manufacturing, consumer products, professional services, and wholesale and large organizations. SAP offers a Premium edition (an all-in-one package) as well as a Composable edition, which provides the core platform and an à la carte choice of modules. Pricing is tiered and based on GMV or orders. SAP may be particularly suited to large global organizations with complex catalogs and business models because of its comprehensive OOTB features for B2B and B2C use cases.

## Strengths

- **Vertical presence:** SAP serves most industry verticals and has the most industry accelerators among all vendors in this research. Its offerings include accelerators for telecom and utilities, financial services, travel and citizen engagement.
- **Customer-installed base:** SAP offers an extensive suite of ERP and CRM products that bring synergies to the platform. These synergies make SAP Commerce Cloud particularly appealing

to SAP's large ERP- and CRM-installed base.

- **B2B capabilities:** SAP offers comprehensive B2B functionality for global organizations with sales in multiple geographies. It offers strong catalog management and multistorefront capabilities, as well as granular controls for roles and permissions, organizational hierarchies, approvals, budget and cost center.



### **Cautions**

- **Product innovation:** While SAP provides APIs and a decoupled storefront framework, it lags in frontend developer tooling. Its core product lacks sought-after AI capabilities, such as content generation and assistance, which are available at extra cost via the SAP CX AI Toolkit module but lack UI harmonization.
- **Pricing and TCO:** The pricing structure is rigid compared to others in this research and TCO (including those for maintenance and upgrades) can become an issue if a strict no-customization strategy (only using the extensibility frameworks) is not followed. In addition, SAP-specific skills are less common and tend to be more expensive.
- **Monolithic core:** Despite recent releases of decoupled, services-based SaaS modules, such as order management, payments, intelligent search and intelligent selling services, SAP's commerce core remains mostly monolithic, requiring a full-stack development team.

### **SCAYLE**

SCAYLE is a Niche Player in this Magic Quadrant. Its SCAYLE Commerce Engine is modular, deployed as multitenant SaaS with single-tenant SaaS options on AWS, and includes marketplace operations, OMS, DAM, PIM, Search, Checkout, Promotions, headless storefronts for web and Mobile App Suite as well as modules for unified retail such as an in-store associate app. SCAYLE primarily has clients in retail, consumer brands, and wholesale. It serves companies spanning a range of sizes, the majority of which are over \$250 million GMV, mainly in Europe but also in North America. SCAYLE's commercial model enables customers to pay only for what they use or need, such as the number of modules deployed. SCAYLE is particularly suited to complex retail, consumer brands and wholesale clients because of its prebuilt accelerators with OOTB features for end-to-end support.

### **Strengths**

- **Composable modules:** SCAYLE offers a broad set of robust, composable modules, like catalog management, PIM, DAM, marketplace operations, distributed order management (DOM), promotions, search, checkout, customer service, mobile app accelerators and unified retail capabilities. It provides low-code/no-code options for quick wins.
- **Pricing and billing:** SCAYLE's model is based on actual usage, not projections. Customers pay for what they use from go-live, with an annual tier-based fee and retroactive monthly billing.
- **Unified retail execution:** SCAYLE supports complex retail needs with accelerators and experiential features, like AR-enabled virtual try-ons. Its product data model accelerator helps

expedite management efforts, which can be valuable for “bricks and clicks” retailers and brands under commercial pressure and time constraints.



### **Cautions**

- **Vertical focus:** Eighty-two percent of SCAYLE clients are in retail, consumer brands and wholesale. Organizations in other industries must assess whether this vendor has the expertise to help them with any industry-specific requirements.
- **B2B functionality:** SCAYLE has a growing set of B2B commerce capabilities but lacks features such as enabling sales reps to complete quote requests and buy on behalf of customers. Clients looking for advanced B2B functionality should, therefore, review their requirements against the vendor’s roadmap.
- **Personalization:** SCAYLE lacks native personalization, though it offers a range of connectors to third-party engines such as Dynamic Yield, and exposes personalization segments in the SCAYLE UI. Organizations with existing personalization engines should assess their integration needs and consult reference customers.

### **Shopify**

Shopify is a Leader in this Magic Quadrant. Shopify is a multitenant SaaS product, and the company also sells its cart and check-out as a stand-alone headless-optional solution. All products run on Google Cloud Platform and are available in supported regions. Shopify serves customers in many industries, with the majority in retail. Shopify Plus mostly sells to midsize organizations, plus a few with annual GMV over \$1 billion. Pricing is retroactive and includes a fixed monthly subscription and/or a GMV-based variable fee, plus a transactional fee for native Shop Pay. Shopify may be particularly suited to organizations seeking fast time-to-market because of its easy setup, broad portfolio, extensive APIs and flexible data model.

### **Strengths**

- **Innovation:** Shopify has over 4,500 R&D employees and spent \$1.73 billion on R&D in 2023. It acquired companies to enhance marketplace integration, check-out customization and headless storefronts. It also improved large-language-model-based features, dropshipping, and its shopping and fulfillment app.
- **Market dominance:** Shopify had over \$7 billion in revenue in 2023, a 26% increase over 2022. It is growing fast in the enterprise market, and Gartner client inquiries indicate increasing interest in this vendor.
- **Unified retail commerce:** Shopify supports multiple channels, including digital, store, social media, online marketplaces and business models such as light (but growing) B2B, B2C and subscription on the same platform, with management from a single back end. It offers a native mobile POS system, a clienteling app and real-time inventory.

### **Cautions**



- **Use-case breadth:** Shopify currently best suits retail and D2C brands, lacking industry accelerators and sophisticated B2B and B2B2X functionality, such as managing organizational structure and line-item RFQs.
- **Pricing and TCO:** Its enterprise pricing includes a fixed subscription and revenue share, with higher fees for online orders. Customization needs for complex businesses can increase TCO.
- **Multistorefront functionality:** The Shopify Markets module offers internationalization and localization, but the product lacks inheritance or parent-child models for localizing products, pricing, promotions and content, limiting multibrand rollouts.

## Shopware


Shopware is a Niche Player in this Magic Quadrant. Shopware 6.5 commerce cloud is based on the Symfony PHP framework. It is commercially licensed for on-premises and cloud deployments as either SaaS or managed/hosted. An open-source version is also available that does not include the B2B suite. The majority of Shopware's clients are in the wholesale/distribution, retail or manufacturing verticals and have online annual GMVs of less than \$50 million. Shopware has a variety of pricing options, including GMV percentage, order-based or fixed-license fees. Shopware may be particularly suited to midsize and lower enterprise B2C and B2B businesses because of its deployment model options and easy-to-use platform.

## Strengths

- **Storefront management:** Shopware provides an intuitive UI for visual page building, including assistive generative AI (GenAI) for text and image generation. These added user-friendly capabilities can help customers simplify the design process and accelerate time to live.
- **Deployment flexibility:** Shopware offers various deployment methods, including SaaS, PaaS, fully on-premises and hybrid solutions. SaaS ensures continuous, versionless innovation, while self-hosted deployments offer greater flexibility and customization.
- **Product innovation:** Shopware provides some unique features not commonly seen in other platforms, including a native digital sales room (DSR) functionality, 3D image visualization and an AR feature for displaying products.

## Cautions

- **Geographic presence:** Shopware's customers are primarily in EMEA, with a small but growing presence in North America, and its geographical breadth of solution integration partners is more limited than most other platforms in this research. This smaller presence potentially limits its ability to provide robust support for clients' global efforts.
- **Market responsiveness:** Shopware offers fewer major production releases per year compared to the market average for its licensed software and PaaS customers. It provides weekly releases for those clients using its SaaS solution. Additionally, between April 2023 and June 2024, it received low Gartner Peer Insights evaluations based on its customers' likelihood to recommend the product.

- **Unified retail commerce and personalization:** Shopware relies on third-party integrations or customizations via APIs for physical store integration and native personalization. Prospects  desiring native unified retail capabilities should look elsewhere.

## **Spryker**

Spryker is a Leader in this Magic Quadrant. Spryker Cloud Commerce OS is deployed as PaaS, with a SaaS low-code extension/composition platform. Typically deployed on AWS, it also supports Microsoft Azure and Google Cloud Platform. Spryker has three fully SaaS modules for an extra cost: a frontend development tool (Composable Storefront), a no-code integration hub (App Composition Platform) and a marketplace operation application (Spryker Enterprise Marketplace). B2B pricing is based on order volume and AOV, with GMV for retail clients. Most clients are in manufacturing, retail and distribution. Spryker may be particularly suited to clients needing a mix of B2B, B2C, B2B2X and marketplace business models due to its flexible, modular approach and breadth of capability.

### ***Strengths***

- **Complex business model support:** Spryker distinguishes itself by offering a modern, optionally headless, highly modular architecture, while also serving enterprise-level clients across B2C unified retail, complex B2B and marketplace operations business models. Few vendors solve for so many use cases.
- **Market momentum:** Spryker is among the fastest-growing vendors in this research, with a high percentage of its customer base having over \$100 million in GMV. It has also attained a relatively strong balance of customers across major world regions.
- **Auction capability:** Spryker's new auction tool is unique among the vendors in this research and the market at large. For organizations looking to integrate auctions with digital commerce or marketplace operations, this capability could be a differentiator.

### ***Cautions***

- **Regional support:** Spryker's relatively small-pattern ecosystem and its own support are primarily focused in North America and EMEA. Customers in other regions must check for operational and implementation support.
- **Market awareness:** Spryker has a broad range of large customers, but general awareness of the platform remains low. In Gartner client inquiries, this vendor is sometimes known, but rarely found in Gartner client shortlists relative to other Leaders.
- **Deployment architecture:** Spryker's mix of SaaS and PaaS may suit digitally mature organizations with in-house development teams. However, it may be less suitable for those looking simply to configure a packaged solution, consume APIs or manage full-stack software themselves.

## **Virto Commerce**

Virto Commerce is a new entrant in 2024 and a Niche Player in this Magic Quadrant. Virto Commerce is a .NET-based platform, globally available and deployed as a single-tenant PaaS in Virto Cloud, on Microsoft Azure by default. Virto Commerce supports other public clouds of the customer's choice, as well as private cloud and on-premises deployments. Virto Commerce targets B2B organizations in manufacturing, distribution and wholesale, and the majority of customers have an annual GMV of less than \$250 million, although some exceed \$1 billion. Pricing is based on GMV or orders with extra costs for marketplace operations and storefront modules. Virto Commerce may be particularly suited to organizations with technical (.NET) skills in need of a customized solution, due to its open architecture.



### **Strengths**

- **Global availability:** Despite its small size, Virto Commerce is present in all major world regions, offers flexible deployment options and can support customers in any market. Its service partners are strategically distributed across regions.
- **Pricing flexibility and SLA:** The platform uses standard GMV- or order-based pricing, but larger-size customers signing long-term contracts can negotiate for other options. Virto Commerce also offers a relatively high SLA, with 99.99% uptime and a committed maximum response time of one business hour.
- **Modularity:** Virto Commerce's platform features a modular architecture and high extensibility. It is containerized and supports deployment in any cloud with independent scaling by module.

### **Cautions**

- **Vertical coverage:** Virto Commerce focuses on B2B organizations in manufacturing, distribution and wholesale, with a low presence in other verticals. Customers in other verticals should verify this vendor can meet their needs.
- **OOTB functionality:** Compared to other vendors in this research, Virto Commerce has fewer OOTB features, such as a visual editor, advanced B2B search and order management. It has basic functionality for roles, catalog, RFQ, impersonation and multistorefront but lacks no-code rules and workflow engines, and organizational hierarchy tools.
- **Ecosystem integration:** Virto Commerce has fewer ecosystem partners or integrations than most vendors in this research. Customers will need to rely heavily on development for integrations and extensions.

### **VTEX**

VTEX is a Challenger in this Magic Quadrant. VTEX's Commerce Platform is a multitenant SaaS deployed on AWS. It has 22 independent modules sold separately or together across five areas: digital commerce, distributed order management, marketplace operations, channel management and experience management. VTEX serves many verticals, primarily retail and manufacturing. Once focused on smaller Latin American firms, VTEX now has large international clients, some with over \$500 million annual GMV. Pricing combines projected GMV with deployed B2B or B2C use cases, modules and architecture components paid upfront annually. VTEX may be particularly

suitable to organizations seeking B2C and B2B use cases on a single platform due to its unified architecture and modular capabilities.



### **Strengths**

- **Composability:** VTEX offers a modern, modular, API-first composable platform that includes a headless CMS. It promotes practical composability, balancing packaged simplicity and complexity underpinned by its low-code, no-code platform.
- **B2C and B2B innovation:** VTEX has demonstrated an ability to deliver a strong innovation roadmap for B2C and B2B, including retail media operations for marketplace sellers and live commerce features for a mini-B2B DSR.
- **Unified retail commerce execution:** VTEX provides and enhances key functionality for store integration, using its native DOM system and marketplace operations. It has embedded AI to automate and optimize WhatsApp messages, return requests, approval/rejection and live shopping chat.

### **Cautions**

- **Global and enterprise experience:** VTEX is expanding its enterprise reach, but large enterprises may struggle to find similar reference customers. Such prospects should carefully assess its ability to operate at a global scale.
- **Platform UX:** Despite its rich features, some aspects of VTEX's business user UX can be cumbersome. For example, publishing content via the headless CMS may require code deployment, and creating new storefronts is complex compared to other vendors in this research.
- **Native personalization:** VTEX has limited native personalization capabilities, using simple rule-based personalization for tactics such as product recommendations. VTEX relies on integrations with third-party personalization platforms to enable AI-driven customer segmentation and recommendations for both products and content. Prospects should consider the cost and integration implications to deliver advanced personalization capabilities.

## **Vendors Added and Dropped**

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

### **Added**

- Liferay
- Optimizely

- Virto Commerce



## Dropped

- THG Ingenuity
- Unilog

## Inclusion and Exclusion Criteria

The inclusion criteria represent the specific attributes that Gartner analysts deemed necessary for vendors to satisfy to appear in this Magic Quadrant. To be included, each vendor had to satisfy the following inclusion criteria, defined by Gartner, as of 31 July 2024:

- The vendor had to offer for sale at least one digital commerce platform that matched Gartner's digital commerce platform product description and the requirements for digital commerce platform product functionality (see below).
- The digital commerce platform had to support over 60 production customers.
- The digital commerce platform had to serve customers in more than one unique industry. Additionally, the platform had to have at least 5% of its production customers in those industries.
- The digital commerce platform had to be used by paying customers in more than one region. Additionally, the platform had to generate at least 5% of its digital commerce revenue from those regions.
- The digital commerce platform customers could not consist of more than one customer that represented more than 10% of the annual recognized digital commerce software revenue.

Additionally, due to the competitive nature of this segment, vendors had to satisfy one of the following three scenarios for year-over-year (YoY) customer growth, revenue growth and total revenue for their digital commerce platforms.

### Scenario 1:

- Net new digital commerce platform customers during 2023: More than five
- Annual recognized digital commerce software revenue in 2023: Equal to or greater than \$20 million
- Growth in annual recognized digital commerce software revenue from 2022 to 2023: Greater than 10%

### Scenario 2:

- Net new customers in 2023: More than five

- Revenue in 2023: Equal to or greater than \$50 million
- Revenue growth from 2022 to 2023: Greater than 5%



### Scenario 3:

- Net new customers in 2023: More than five
- Revenue in 2023: Equal to or greater than \$70 million

The following Gartner definitions inform the preceding inclusion criteria:

- **Digital commerce platform product description** – A digital commerce platform is the core technology that enables customers to purchase goods and services through an interactive and usually self-service experience. The platform provides the necessary information for customers to make buying decisions, and uses rules and data to present fully priced orders for payment.
- **Digital commerce platform product functionality** – The platform must have OOTB capability to provide, or APIs to support, a self-service, interactive commerce experience that includes storefront, product catalog navigation, product pages, shopping cart, check-out and customer account. Out of the box, the platform must have the ability to search for a product, add products to a cart, and fully price an order inclusive of product-level, customer-level and order-level discounts or promotions. In some B2B scenarios, this may involve assistance from sales personnel. The platform must support interoperability with customer, product, content and order functionality, and with data via APIs.
- **Production customer** – A production customer is an organization that has purchased the digital commerce platform, has a corresponding contract with that platform's vendor in the name of the buying organization, is live and transactional on the platform, and pays for use of the platform (that is, one production customer equals one production contract).
- **New digital commerce platform customers** – This is the number of new digital commerce platform customers who signed a contract during 2023. It is not a YoY or net growth number, but a new customer count number.
- **Annual recognized digital commerce software revenue** – This is defined as total revenue exclusively from the sale of licensed software (regardless of deployment model, whether on-premises, SaaS or another model) that can be reported for a specific year according to generally accepted accounting principles (GAAP). For the purposes of this document, annual recognized digital commerce revenue excludes revenue generated by supporting ecosystem applications and services such as web content management (WCM); digital experience platform (DXP); distributed order management (DOM); product information management (PIM); configure, price and quote (CPQ); merchant of record (MoR) services; and payment services. Also excluded is revenue from a parent organization or another business entity within the same parent organization.

## Honorable Mentions



Gartner tracks more than 160 vendors in this market. Nineteen vendors met the inclusion criteria for this Magic Quadrant, but a vendor's exclusion does not necessarily mean that it lacks viability or its products lack viability.

The following four vendors met several, but not all the inclusion criteria, thereby failing to achieve the required combination of YoY customer growth and total license revenue for their digital commerce platforms:

- **Intershop Communications** — The Intershop Commerce Platform is available as a single-tenant-hosted or multitenant SaaS offering. It offers both B2C and B2B functionality, but more recently has focused on larger B2B clients and those wishing to operate both models. It is primarily used by larger customers in Europe who require a flexible platform that offers many prebuilt integrations with digital commerce ecosystem applications. Intershop Communications also offers an Angular-based PWA for companies that require a modern, decoupled storefront enabling faster project implementations.
- **NuORDER** — NuORDER by Lightspeed is a B2B, multitenant SaaS digital commerce platform for clients selling consumer goods. It helps build seasonal assortments and facilitate wholesale transactions between brands and buyers in large and midsize organizations. It offers an embedded payments engine, a digital catalog and a native virtual showroom within the platform for retailers and suppliers. NuORDER meets Gartner's revenue and growth thresholds, but its narrow target market precludes entry to the Magic Quadrant, with under 5% of customers outside wholesale purchasing.
- **PrestaShop** — PrestaShop is an open-source, PHP-based digital commerce platform, based in France and long established in Italy and Spain, now expanding across the rest of EMEA and Latin America. As some other open-source digital commerce projects refocus on becoming commercial products, PrestaShop has remained committed to its OS offering. This focus means the vendor is unlikely to reach Gartner's revenue thresholds via the current business model, but market share in EMEA in terms of downloads and live storefronts is strong. PrestaShop mostly targets midsize businesses.
- **THG Ingenuity** — THG Ingenuity is a multitenant SaaS offering the core commerce components of store management, check-out, payments, MoR, plus CRM. Clients also have access to functionalities including a native mobile app, fraud detection, a loyalty program, an OMS, fulfillment and courier management services, in-store fulfillment and customer services. While previously customers were mostly small to midsize brands (under \$10 million GMV), it is now targeting brands and retailers over \$100 million GMV.

## Evaluation Criteria

### Ability to Execute

Companies evaluating digital commerce platforms have wide-ranging requirements, depending on their industry, types of product, business and revenue model, sales strategy and geographic focus,

and the type of CX they wish to deliver. Therefore, breadth of product or service functionality, overall viability, sales execution/pricing, and market responsiveness/record remain highly weighted criteria.



Marketing execution is not rated because we do not find clear differentiation among vendors. Operations is also not rated because these are primarily product companies with lower operational differentiation than among services companies.

**Table 1: Ability to Execute Evaluation Criteria**

<b>Evaluation Criteria</b> ↓	<b>Weighting</b> ↓
Product or Service	High
Overall Viability	High
Sales Execution/Pricing	High
Market Responsiveness/Record	High
Marketing Execution	NotRated
Customer Experience	High
Operations	NotRated

Source: Gartner (November 2024)

## Completeness of Vision

Digital commerce platform vendors must understand not only the market's evolution, but also their clients' specific needs when it comes to strategy and evolving business models. Innovation is also imperative.

Innovative vendors that demonstrate an understanding of the market in their product strategies and emerging business models demonstrate Completeness of Vision. As a result, market



understanding, offering (product) strategy and innovation remain highly weighted criteria. Sales Strategy and Vertical/Industry strategy are weighted low.



Marketing Strategy is not rated because we do not find clear differentiation among vendors. Business Model is also not rated because the business models are very similar, leading to little differentiation.

**Table 2: Completeness of Vision Evaluation Criteria**


<b>Evaluation Criteria</b> ↓	<b>Weighting</b> ↓
Market Understanding	High
Marketing Strategy	NotRated
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	NotRated
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	High

Source: Gartner (November 2024)

## Quadrant Descriptions

### Leaders

Leaders demonstrate the ability to provide a depth and breadth of commerce functionality. They deliver commerce capabilities across multiple industries and business models that can scale up to support large transaction volumes and high levels of digital commerce GMV. They provide sales

and support services both directly and through a robust ecosystem of application, service and integration partners. 

They also deliver additional application functionality or partnerships with vendors that integrate with their core commerce platform. They innovate, typically by means of technology updates to commerce platforms, new products and product functionality, investments inside and outside core digital commerce platforms, and programs that improve customers' ability to succeed.

Leaders also have financial, technical and organizational viability, and consistently feature in Gartner clients' evaluations of digital commerce vendors. They often set the competitive benchmark against which other vendors measure themselves.

## **Challengers**

Challengers provide commerce functionality that may have a narrower scope in relation to serving the total addressable market than that of Leaders, but execute well against that scope.

Challengers may focus on fewer industries, geographies, business models or a GMV segment of customer size.

These vendors are often highly respected. They invest in innovation that is key to their target markets. They use their research and development resources and access to investment, profits and market reputation to grow quickly or attract a new kind of customer.

Challengers often focus on a perceived high-growth sector of the market or have a large established customer base. They often invest heavily in technology to meet the needs of their target customers and have robust feature sets for the customers they serve.

## **Visionaries**

Visionaries demonstrate the ability to disrupt established commerce markets through innovation. They may incorporate new technologies or architectural approaches into their platforms, use creative pricing strategies or focus on a narrow market segment. Conversely, they may also focus on breadth of scope over depth and differentiate in that way.

They often win new customers quickly because they have identified an underserved niche in the market. Visionaries often have modern offerings that have yet to win large numbers of customers and often lack resources compared with larger companies.

They also often have smaller partner networks and act as fast movers. Visionaries are often funded by venture capital or private equity companies, which provide the capital that enables them to invest in technology, sales and marketing resources for continued progress.

## **Niche Players**

Niche Players address a narrow band of the market, defined by industry, digital commerce GMV, company size, region, technology capability or a combination of these characteristics. They frequently provide cost-effective solutions.

They often target smaller or emerging-market opportunities, or smaller end-user companies. Niche Players often lack geographical or transactional scale; attract a significantly smaller range of technology, implementation or service partners; and offer more narrowly focused products, focusing either on B2C or B2B, but not both equally.

They lack the financial viability of Leaders and Challengers, although they still meet the inclusion criteria. Niche Players are often funded by venture capital or private equity companies, which provide the capital that enables them to invest in technology, sales and marketing resources for continued progress.

## Context

The inclusion criteria for vendors in this Magic Quadrant emphasize annual digital commerce revenue and customer growth. Vendors' financial performance remains important, but we also consider the size of the customer base on which the growth is based. Digital commerce remains a lucrative area for many commerce platform and ecosystem application vendors. However, for the first time we adjusted the growth inclusion threshold for this research downward slightly, due to relatively low growth in the market.

The evaluation criteria emphasize the requirements for future success, architectural vision, innovation and breadth of capabilities. Buyers of digital commerce platforms are looking for ways to deliver and support a unique, compelling and consistent CX through these platforms across many channels.

While they may pursue this goal in different ways, buyers are all seeking more flexible and nimble implementations and postimplementation extensions that enable accelerated time to market, reduce TCO and deliver desirable digital business outcomes. They also recognize the importance of a vendor's ability to attract and develop an ecosystem of technology and service provider partners that add value to its digital commerce platform.

This is especially true as commerce platforms become more modular and cater to companies that are interested in decoupled front ends or architectural approaches that put them on a path to composable commerce (see [Quick Answer: What Are the Steps to Prepare for Composable Commerce?](#)). The continuing shift toward composable commerce is based on the potential agility of the resulting modularity, despite its more complex architecture and often, contractual relationships.

Ultimately, however, every organization's requirements are different. Clients should match their requirements for functionality, industry expertise, technology and cost to the right vendor. Such details may appear in any part of this Magic Quadrant, and might apply to the 160-plus other vendors we track that do not appear in this research. Use the companion [Critical Capabilities for Digital Commerce](#) to evaluate vendors' products by particular functional and nonfunctional criteria.

## Market Overview



The digital commerce market reached \$9.98 billion in software revenue in 2023, representing 11.2% year-over-year growth. Businesses continue to scrutinize additional spending on replatforming or entering digital commerce, and the market has not rebounded as expected. For the second consecutive year, Gartner had to lower growth expectations for this market, reducing the midtier segment (\$20 million to \$50 million revenue) requirement from 10% to 5% growth.

The CRM sector, of which digital commerce is part, is forecast by Gartner to achieve a compound annual growth rate (CAGR) of 15.1% in constant currency for the period 2022 through 2027 (see [Forecast: Enterprise Application Software, Worldwide, 2021-2027, 2Q23 Update](#)). Gartner forecasts a CAGR of 16.2% in constant currency for digital commerce software revenue over the same period. However, current trends indicate this target might not be achieved.


Complex B2B sales, which include systems such as CPQ and SFA, often necessitate human involvement. The increasing interest in seller-assisted digital commerce continues, characterized by hybrid selling scenarios where “self-service” B2B is supported by sales agents and frequently uses a DSR. Gartner expects an ongoing convergence of B2B digital commerce and sales (revenue) technology.

GenAI was an almost ubiquitous new feature among vendors in 2023. The main use cases remain content generation and translation. However, assistive GenAI applications within platform administration tools are emerging, and assisted selling tools, including conversational or “quiz-like” commerce discovery applications, are being trialed on storefronts.

## Acronym Key and Glossary Terms

AOV	average order value
API	application programming interface
AWS	Amazon Web Services
B2B	business to business
B2C	business to consumer
B2B2C	business to business to consumer
B2B2X	business to business to X, where X could be consumers, other businesses, franchises, partners, suppliers or any other entity
BOPIS	buy online, pickup in store
CDP	customer data platform



POS	point of sale	
PWA	progressive web app	
RFQ	request for quotation	
SaaS	software as a service	
SFA	Salesforce automation	
SI	systems integrator	
SPA	single-page application	
TCO	Total cost (of) ownership	

## Evidence

This Magic Quadrant is based on primary and secondary research by Gartner. This research drew on, but was not limited to:

- Gartner Peer Insights reviews for “Digital Commerce” posted from 30 July 2023 to 30 July 2024.
- Other sources:
  - [Forecast: Enterprise Application Software, Worldwide, 2021-2027, 2Q23 Update](#).
  - Recorded briefings and demonstrations in which the vendors provided Gartner with insights into their products’ capabilities.
  - Feedback about vendors and their products captured during thousands of conversations and other interactions with users of Gartner’s client inquiry service in 2023 and the first seven months of 2024.
  - Generally available sources of information.

## Evaluation Criteria Definitions

### Ability to Execute

**Product/Service:** Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

**Overall Viability:** Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

**Sales Execution/Pricing:** The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

**Market Responsiveness/Record:** Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

**Marketing Execution:** The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

**Customer Experience:** Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

**Operations:** The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

## Completeness of Vision

**Market Understanding:** Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

**Stratégie marketing :** un ensemble de messages clairs et différenciés, communiqués de manière cohérente dans toute l'organisation et externalisés via le site Web, la publicité, les programmes clients et les énoncés de positionnement.

**Stratégie de vente :** stratégie de vente de produits qui utilise le réseau approprié de ventes directes et indirectes, de marketing, de services et de communication affiliés qui étendent la portée et la profondeur de la portée du marché, des compétences, de l'expertise, des technologies, des services et de la clientèle.

**Stratégie d'offre (produit) :** l'approche du fournisseur en matière de développement et de livraison de produits qui met l'accent sur la différenciation, la fonctionnalité, la méthodologie et les

ensembles de fonctionnalités en fonction des exigences actuelles et futures.



**Modèle commercial** : la solidité et la logique de la proposition commerciale sous-jacente du fournisseur.

**Stratégie verticale/sectorielle** : stratégie du fournisseur visant à orienter les ressources, les compétences et les offres pour répondre aux besoins spécifiques des différents segments de marché, y compris les marchés verticaux.

**Innovation** : Dispositions directes, connexes, complémentaires et synergiques de ressources, d'expertise ou de capital à des fins d'investissement, de consolidation, de défense ou de prévention.

**Stratégie géographique** : stratégie du fournisseur visant à orienter les ressources, les compétences et les offres pour répondre aux besoins spécifiques des zones géographiques situées en dehors de la zone géographique « d'origine » ou native, soit directement, soit par l'intermédiaire de partenaires, de canaux et de filiales, selon ce qui convient à cette zone géographique et à ce marché.

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