

Magic Quadrant pour le commerce numérique

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Le chiffre d'affaires du marché des plateformes de commerce numérique a augmenté de 11,2 % en 2022, soit la moitié du taux de 2021. Cependant, la croissance se poursuit et nous nous attendons à ce que ce taux augmente en 2023. Ce Magic Quadrant évalue 18 fournisseurs de commerce numérique pour aider les responsables d'applications à prendre des décisions éclairées.

Hypothèses de planification stratégique

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

D'ici 2025, 80 % des interactions commerciales B2B entre les fournisseurs et les acheteurs se feront sur les canaux numériques.

D'ici 2025, les entreprises qui offrent une expérience de commerce unifié en déplaçant les clients de manière fluide tout au long des parcours verront leur chiffre d'affaires total augmenter d'au moins 20 %.

Définition/description du marché

Ce document a été republié le 25 août 2023. Le document que vous consultez est la version corrigée. Pour plus d'informations, consultez la page [Corrections](#) sur [gartner.com](#).

Le point de vue de Gartner sur le marché du commerce numérique se concentre sur les technologies transformationnelles qui aident les organisations à offrir des expériences d'achat exceptionnelles à leurs clients.

Gartner définit une plateforme de commerce numérique comme la technologie de base qui permet aux clients d'acheter des biens et des services par le biais d'une expérience interactive et généralement en libre-service. La plate-forme fournit les informations nécessaires aux clients pour prendre des décisions d'achat et utilise des règles et des données pour présenter les commandes à prix complet pour le paiement.

Pour être éligibles à l'évaluation dans ce Magic Quadrant, les plateformes des fournisseurs doivent disposer d'une capacité prête à l'emploi (OOTB) pour fournir, ou d'API pour prendre en charge, une expérience de commerce interactive en libre-service qui comprend la vitrine, la navigation dans le catalogue de produits, les pages de produits, le panier d'achat, le paiement et le compte client. Prêtes à l'emploi, les plateformes doivent également inclure la possibilité de rechercher un produit, d'ajouter des produits à un panier et de fixer le prix complet d'une commande, y compris les remises ou les promotions au niveau du produit, du client et de la commande. Dans certains scénarios B2B, cela peut impliquer l'assistance du personnel de vente. De plus, les plateformes doivent prendre en charge l'interopérabilité avec les fonctionnalités des clients, des produits, des contenus et des commandes, ainsi qu'avec les données via des API.

Plusieurs fournisseurs couverts par ce Magic Quadrant évoluent pour devenir des fournisseurs de solutions plus modulaires et axées sur les API. Pour obtenir des explications et des définitions du commerce modulaire, du commerce composable et du commerce numérique basé sur des API, consultez [Hype Cycle for Digital Commerce, 2023](#).

Quadrant magique

Figure 1 : Magic Quadrant pour le commerce numérique



Points forts et mises en garde des fournisseurs

Adobe

Adobe continue d'être un leader dans ce Magic Quadrant avec sa plate-forme Adobe Commerce. La plate-forme peut être déployée sur site ou dans des clouds publics (avec ou sans services gérés par Adobe). Il est disponible dans le monde entier sur Amazon Web Services (AWS) ou Microsoft Azure. Bien qu'Adobe soit au service de nombreux secteurs, il compte une forte concentration de clients dans les secteurs de la fabrication et de la vente au détail, suivis par les télécommunications, la technologie et les sciences de la vie. Bien qu'il ait historiquement servi les entreprises dont les ventes en ligne sont inférieures à 50 millions de dollars, les dernières années ont vu une augmentation significative du nombre d'Adobe au service des entreprises dont le chiffre d'affaires est supérieur à 250 millions de dollars. Adobe continue d'augmenter la valeur de ses produits groupés, notamment grâce à l'utilisation d'Adobe Sensei AI/ML dans l'ensemble de son portefeuille de produits et dans la personnalisation, ce qui fait d'Adobe Commerce une considération importante pour les clients existants d'Adobe.

Forces

- **Fonctionnalités de commerce de base (B2C) :** Adobe Commerce dispose de fonctionnalités de commerce de base (B2C) riches, en particulier 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. Les clients accordent à Adobe Commerce l'évaluation la plus élevée possible des capacités globales du produit.
- **Frameworks de commerce headless :** Adobe propose plusieurs approches du headless : FEaaS avec CMS headless pour prendre en charge les vitrines headless, une application web progressive native (PWA) appelée Venia storefront et le SDK PWA Studio, ainsi que plusieurs thèmes et vitrines PWA tierces disponibles sur Adobe Commerce Marketplace. Il fournit une application monopage (SPA) basée sur React pour le paiement, une prise en charge accélérée des pages mobiles (AMP) via les extensions Adobe Commerce Marketplace et des partenaires avec des approches SPA. Plus de 500 clients ont déployé Adobe Commerce « headless ».
- **Synergie** entre les suites de produits Adobe : Adobe offre une expérience client plus fluide et personnalisée sur l'ensemble de son portefeuille de produits à l'aide d'Adobe Sensei, ce qui profite aux clients existants d'Adobe, en particulier ceux qui utilisent des produits avec Adobe Commerce. Ces produits incluent Adobe Experience Manager, Adobe Analytics, Adobe Target, Adobe Real-Time CDP et Amazon Marketplace.

Cautions

- **Missing some B2B functionality:** While Adobe continues to offer new product functionality, some B2B functionality is missing (e.g., visual workflow, ability for order approvers to combine multiple orders to achieve volume discounts, usage-based billing capabilities and functionality for customers' [B2B2X] models). Subscription capabilities may require a partner, depending on the level of required sophistication.

- **Potential hidden cost of managed services:** While Adobe – along with many non-SaaS commerce vendors – refers to its commerce offerings as “cloud,” this term should not be confused with SaaS. Unlike SaaS, “cloud solutions” often incur additional costs for ongoing solution management (e.g., hosting, additional services to support maintenance, upgrades, new releases) that are not intuitively obvious. Customers should estimate and include these potential additional expenses when comparing cloud solutions to SaaS solutions.
- **Upgrade challenges:** Adobe released its upgrade compatibility tool in 2022, but customers continue to report challenges with updating their current Adobe Commerce applications, and they evaluate Adobe’s overall service and support as below average. Prospective customers should examine Adobe’s best-practice advice to minimize upgrade challenges as part of their purchase decision.

BigCommerce

BigCommerce is a Challenger in this Magic Quadrant. Its digital commerce platform is multitenant SaaS hosted on Google Cloud Platform, and BigCommerce also has a channel integration solution from its Feedonomics acquisition in 2021. The commerce solution can support both B2B and B2C use cases on the same platform, and has a B2B Edition add-on for its enterprise packages for more sophisticated functionality such as sales rep support, account/budget management and quote management. BigCommerce mostly sells to small and midsize organizations with an annual gross merchandise value (GMV) of less than \$10M. The majority of its clients are in North America, with a growing presence in Europe and Asia/Pacific. BigCommerce primarily targets the retail and business/consumer service verticals, and has presence in transportation, high tech and media.

Strengths

- **Headless architecture:** BigCommerce offers a native low-code storefront framework called Stencil, and a no-code page builder. For headless applications, it offers a number of preintegrated third-party front-end options supporting PWA, FEaaS, CMS and DXP, and headless APIs for customers’ own front ends.
- **Strong growth:** Despite economic headwinds, BigCommerce is one of the few vendors in this Magic Quadrant that experienced double-digit growth in 2022 over a revenue base of more than \$100M. This speaks to increased viability and rate of innovation if growth revenue is reinvested.
- **Application ecosystem:** BigCommerce has an extensive number of preintegrated third-party applications in many categories covering front-end technologies such as CMS, DXP and search, and back-office applications such as PIM, ERP, POS and OMS.

Cautions

- **Large-enterprise functionality:** Some OOTB features are insufficient for large enterprises, such as granular roles and permissions, complex catalog management, search merchandising, personalization, and unified commerce. These gaps can be narrowed by third-party integrations at extra cost.

- **Small-customer focus:** The proportion of BigCommerce's customers with a GMV of less than \$10M is much higher than most other vendors in this evaluation, indicating a customer base toward smaller-size companies.
- **Limited geographic and industry presence:** Most of BigCommerce's customers are in North America, and the solution is primarily sold to customers in retail and business and consumer services; its presence in other industries is sparse.

commercetools

commercetools is a Leader in this Magic Quadrant. It offers a multitenant SaaS platform on Google Cloud Platform and AWS. Its core commerce products include B2B, B2C and Frontend, with more functional add-ons. The platform fee is driven by a combination of order volume, GMV, SKUs and projects, and customers can buy additional order volume when exceeding the package threshold. Some customers also pay for functional modules only as supported by the vendor's modular platform. commercetools has a strong presence in Europe and North America, and a small base in Asia/Pacific (now including China) and Latin America. It serves customers in a wide range of industries, with a majority in retail, manufacturing, wholesale, life sciences and healthcare. commercetools targets large global organizations, with a good portion of customers having a GMV of over \$250M.

Strengths

- **Composability:** commercetools offers a modular architecture with decoupled front end, extensive APIs and a flexible data model that allows customers to easily build their own functionality, supporting customization and scalability at the same time. Its Frontend product offers rich options for customers to implement the storefront using native, third-party or custom-built solutions.
- **Large-enterprise focus:** commercetools' customer base is skewed toward large enterprises that operate multiple product lines in multiple regions, with annual GMVs of over \$250M.
- **Global footprint:** commercetools has clients in all major regions, a network of service partners present in all of these regions and a global hosting infrastructure – including footprint in the Chinese mainland.

Cautions

- **Lack of innovation:** Except for modular architecture, commercetools hasn't addressed emerging customer demand for new business models such as marketplace operations capability, unified commerce features, AI-driven data insight and low-code/no-code integration tools.
- **Lower OOTB functionality:** While commercetools' core platform has increased OOTB functionality over the last two years, it still falls short when compared with several other vendors in this evaluation. Customers have to build their own or use third-party solutions for moderately sophisticated features such as promotion extensions, search configurations, behavior-based personalization, visual merchandising and in-store apps.

- **Implementation complexity:** commercetools relies on ecosystem partners for extended functionality in search, personalization, unified commerce and integration tools, and requires configuration of the data model involving multiple entities to achieve functionality (e.g., service and digital product types, product badging, configuration pricing, estimate shipping time and cost, and line-of-credit accounts).

Elastic Path

Elastic Path is a Visionary in this Magic Quadrant. It offers two commerce platforms: Elastic Path Commerce and Elastic Path Commerce Cloud. Elastic Path Commerce is available for self-hosting by customers, either on-premises or on their chosen cloud environment. Elastic Path Commerce Cloud is a multitenant SaaS platform and is Elastic Path's primary commerce offering. It is a modular platform, with some specific capabilities available stand-alone: Product Experience Manager, Composer, Payments, Cart and Checkout, and CX Studio. Pricing is based on GVM or order numbers, with costs per module used. CX Studio pricing is based on page views. Elastic Path mostly sells to midsize organizations with an annual GMV of less than \$100M. Elastic Path's clients are mostly retailers and manufacturers based in North America. Most of Elastic Path's clients use its solution for B2C business, but Elastic Path continues to extend its B2B and B2B2C capabilities. In 2023, Elastic Path acquired Unstack, a digital experience composition (DXC) solution, and renamed it Elastic Path CX Studio.

Strengths

- **Packaging composability:** Elastic Path differentiates by providing low- and no-code tooling to enable its customers to embrace composability without the technical or operational sophistication traditionally required to succeed in this endeavor.
- **Incremental modernization/strangling:** By its modular nature, Elastic Path Commerce Cloud suits incremental shifting toward modern architecture, and incremental modernization or "strangling the monolith" approaches.
- **Support for customer success:** Elastic Path has a comprehensive postsales environment, with customer success managers, regular meetings and technical support for customers. It gained a top evaluation in this regard from Gartner Peer Insights users. Composable Commerce XA provides differentiating platform integration and third-party app monitoring and support.

Cautions

- **Limited core capabilities:** Elastic Path continues to roll out enhancements, but has chosen to pursue a composable approach and partner with best-in-class vendors for more sophisticated capabilities in areas such as search, recommendations and OMS. Requests for quotes for B2B and promotions capabilities still lag behind those of leading platforms.
- **Low vendor growth overall:** Though Elastic Path is gaining customers on Commerce Cloud, overall growth of the vendor remains low, and it is rarely seen in client shortlists.
- **Tight scoping:** Elastic Path Commerce Cloud is a deliberately tightly scoped platform for core commerce capabilities. Some extended capabilities found native in competitor platforms, such

as personalization and product search and discovery, require partnerships.

HCLSoftware

HCLSoftware is a Challenger in this Magic Quadrant. HCL Commerce Cloud is a hybrid single-tenant and multitenant platform, with single-tenant components managed by HCL or HCL clients. Pricing for HCL Commerce Cloud is based on a combination of order lines and peak order lines per hour. HCLSoftware customers are typically larger companies with annual GMV of over \$250M in a diverse set of industries, with the most common being retail, manufacturing and telecommunications. HCLSoftware's customer base is primarily in North America and Europe, with a smaller number of customers in Asia/Pacific and Latin America.

Strengths

- **Functionality and bundled applications:** HCL Commerce Cloud offers extensive native functionality along with several bundled applications at no additional cost. Headless SPA storefronts for both B2C and B2B (B2B was released in 2022), CDP, page composer, catalog ingestion tool, customer service hub and a marketplace operation application are all included in the base license cost.
- **Scalability:** HCL Commerce Cloud is used by some very large companies generating more than \$10B in annual GMV. Every release is benchmarked at 100K orders/hour, and some customers exceed that threshold.
- **Product discovery:** HCLSoftware has strong product discovery capabilities relative to other vendors in this Magic Quadrant. It offers basic natural language processing (NLP) along with capabilities for semantic search, mock search, voice to text (powered by Google), visual search (powered by Google), color synonyms, dimensional (measurement unit) transformations and zero-search-results mitigations.

Cautions

- **Disjointed business user experience:** While HCLSoftware offers robust commerce functionality, the business user admin consoles required to administer the platform can be complex and nonintuitive. Additionally, HCL customers are sometimes required to use separate admin consoles for common tasks, such as catalog ingestion, page setup and ordering on behalf of customers.
- **Limited growth:** Despite a stable base of large customers, HCLSoftware has not grown its customer base as quickly as other direct competitors. Due to a smaller market presence, prospective customers should spend additional time validating solution integrators and partner integrations.
- **Lower composability:** HCL Commerce Cloud remains a monolithic platform, with tightly coupled core commerce capabilities including price and promotions, cart, check-out, B2B capabilities, and product catalog functionality. While developing packaged business capabilities (PBCs) for inventory and approvals is on HCLSoftware's roadmap, there are no plans to modularize the aforementioned components of the core platform.

Infosys Equinox

Infosys Equinox continues to be a Niche Player in this Magic Quadrant. Its platform utilizes a modern architecture that is API-first, with 20 independently deployable modules. It can be deployed in three ways: multitenant SaaS, single-tenant hosted with managed services or on-premises. Many add-on options are available, including managed hosting services, Equinox Studio (low-code page builder application), SMB Admin (simplified business administration tool for nonenterprise clients) and Conversational Commerce. The platform appeals to multiple industries (especially retail, manufacturing, media and telecom) and to larger organizations generating GMV over \$250M. In April 2022, Infosys completed its acquisition of oddity, a Germany-based digital marketing, experience and commerce agency.

Strengths

- **Modern composable architecture:** Designed for enterprise customers, Infosys' API-first, headless architecture provides flexibility. Customers can deploy a module, multiple modules or the entire platform. Each module (if purchased separately) has its own back-end tooling capabilities – each with its own access control.
- **Core commerce functionality:** Equinox Commerce includes sophisticated functionality for role management, marketing content management and promotions with built-in subscriptions, loyalty and merchandising capabilities. Its API-enabled Equinox Studio enables connections to headless stores for managing content and metadata. Recently added, in addition to components mentioned above, were AR/VR, recommendations using Genome Solution (CDP and analytics), Virtual Closet and NLP-based search.
- **End-to-end approach:** Infosys offers multiple products and solutions that enable it to provide an end-to-end industry solution within one contract – including digital commerce, supporting applications, required customization, implementation, hosting, operations and support services.

Cautions

- **Missing functionality:** While Infosys offers a robust set of functionalities, some functionality such as storefronts, digital rights, product recommendations, search capabilities and AB testing may require additional charges for more advanced capabilities. Clients should ask detailed questions when examining functionality.
- **Advanced personalization requires additional cost:** Personalization with AI requires purchase of Infosys Customer Intelligence Platform. Alternatively, customers would need to find a third-party CDP that Equinox can integrate into.
- **Limited digital commerce operational presence:** Infosys has a very small operational presence for digital commerce in North America and Europe, with the vast majority of its digital commerce operations in India. Its client-facing and platform leadership team members are located in multiple client markets. Its data centers/hosting capabilities include the eastern and western U.S., Ireland and India. Clients desiring a broader global operational presence may need to work with a partner.

Kibo

Kibo is a Challenger in this Magic Quadrant. Its Composable Commerce Platform is multitenant SaaS and hosted on AWS or Google Cloud Platform. Kibo's platform supports three primary capabilities: B2B/B2C commerce, order management and subscription commerce, which can be purchased separately or together. In addition, Kibo offers native search and product discovery, CMS, PIM, DAM, POS and OMS capabilities. Kibo spun off its personalization and some optimization capabilities (Monetate and Certona) in October 2022. These remain natively integrated with Kibo's platform, but at extra cost. Most of Kibo's customers are in North America and the retail industry, and Kibo also has presence in Europe and a small footprint in industries such as manufacturing, distribution, life sciences and healthcare. Kibo has customers of all sizes, but the majority have annual GMV of between \$50M and \$250M.

Strengths

- **Breadth of offerings:** Besides the core commerce platform offerings, Kibo also offers search and product discovery, CMS, PIM, DAM, POS, OMS, clienteling, call center and customer service, and subscription selling capabilities that are natively integrated with the commerce platform. It embeds the Looker analytics engine in the platform at no extra cost. The full-suite offering appeals to customers interested in having an end-to-end solution from the same vendor.
- **Headless options:** Besides the native storefront, Kibo preintegrates with a number of headless CMS solutions such as Amplience, Builder.io, Contentful and Contentstack. It offers native mobile SDK for iOS and Android, PWA omnichannel reference stores, and integrates React Storefront and Vue Storefront for B2B, retail and D2C.
- **License options:** Kibo offers three options: (1) the all-you-can-eat package including all core commerce platform capabilities, (2) solution packages based on business needs such as B2B, B2C, subscription or order management and (3) individual modules such as search/product discovery, catalog pricing and promotions, cart and check-out, and inventory and order routing. All packages are driven by GMV or order volumes. This gives customers flexibility in choosing the package that best fits their needs while keeping the pricing straightforward.

Cautions

- **Limited geographic presence:** The majority of Kibo's customers are in North America, with Europe as a distant follower. It has very few sales outside these two regions.
- **Limited focus on personalization:** Kibo spun off its personalization capabilities in October 2022, after acquiring Monetate and Certona in 2019. This runs counter to the market trend whereby vendors are increasing investment in building native personalization capabilities.
- **Fewer ecosystem and partner networks:** Kibo has fewer preintegrated third-party applications than other vendors in this evaluation, given Kibo's full-suite offering. Its service partners are predominantly in the U.S. with some in Europe – but fewer than other vendors in this Magic Quadrant.

Oro

Oro is a Visionary in this Magic Quadrant. OroCommerce platform contains digital commerce, marketplace operations and CRM capabilities. Clients are free to substitute their own CRM choice. OroCommerce is a single-tenant digital commerce platform that can be deployed on OroCloud, public clouds, private clouds and on-premises. Oro primarily targets B2B and B2B2X businesses, but can also support B2C use cases. Although Oro has some large enterprise customers, the majority of its clients are midsize manufacturing and distribution organizations (with \$10M to \$250M in annual GMV) in North America and Europe.

Strengths

- **B2B workflows:** Oro's workflow builder continues to be its strongest differentiator in this space. It has a native visual workflow designer with an extensive feature set that enables the seller to manage not only the order approvals but also key modules such as promotions, catalogs and content. It also enables personalized workflows per customer account.
- **B2B sales capabilities:** Oro's B2B sales dashboard provides an extensive view of all customer-specific sales activities and interactions across online/offline channels. Oro also enables a sales associate with a granular request for quotation (RFQ) capability, such as price overrides, to offer additional discounts or add/remove products from the quote.
- **Multisite management:** Oro multisite tooling capabilities enable business users to create additional storefronts without IT intervention. Oro provides some granular capabilities such as the ability to share customers/catalogs/content across multiple sites or keep them unique to each storefront. Another differentiating feature that Oro provides is the ability to set up B2C storefronts in the same instance as B2B using some of its preconfigured templates. Business users can then enable or disable capabilities that need to be displayed on that storefront.

Cautions

- **Lack of B2C focus:** Although Oro provides B2C capabilities, most of its customers use the platform primarily for B2B use cases. This is reflected in Oro's lack of advanced B2C capabilities, such as personalization and unified commerce.
- **Lack of decoupled storefront capabilities:** Oro has a native "head-on" storefront, but it lacks native tooling for headless storefronts, specifically SDKs for SPAs and mobile apps. Headless operation can be supported via third-party integrations and customizations.
- **Focused on productized integrations:** Natively, Oro is a package solution where it is tightly integrated to its modules. It lacks a broad technology ecosystem of plug-in options to popular third-party providers used widely in the market, specifically for PIM, CRM, CMS and ERP.

Salesforce

Salesforce is a Leader in this Magic Quadrant. Salesforce offers B2C Commerce Cloud for companies selling at a large scale to consumers, B2B Commerce for businesses selling to other

businesses, and D2C (renamed from B2B2C). B2B and D2C may be licensed together or individually under “Salesforce Commerce.” The D2C product is for existing B2B Commerce customers who sell directly to consumers on a smaller scale than Salesforce B2C Commerce customers. Salesforce offers many products that are complementary to digital commerce at additional costs, such as CDP, OMS, SFA, B2B marketing automation and customer service solutions. Salesforce serves clients ranging from midsize organizations to large enterprises in many geographies and industries.

Strengths

- **Product development velocity:** Salesforce released a significant amount of new features across all platforms in the last year: integration to social channels, phased headless rollouts, Page Designer support for composable storefront, integration to and commerce-specific templates for Salesforce’s automation tool Salesforce Flow and a store fulfillment app. As a result, Salesforce is one of the vendors most frequently asked about by Gartner clients, often ending up on shortlists and as a final selection.
- **Personalization capabilities:** Both the B2B and B2C platform have strong personalization functionality, including the ability to access customer, product and order data from other Salesforce applications to strengthen segmentation and promotions.
- **Headless enablement for B2C:** Salesforce offers phased headless rollout capabilities, so clients can use an incremental approach to transition from the native, template-based storefront (known as SFRA) to a PWA, even one page at a time. Salesforce’s Page Designer also now works with the headless storefront PWA.

Cautions

- **B2C architectural evolution:** Both existing and new B2C Commerce Cloud customers use a commerce technology stack that was not built on the Salesforce platform (for functional areas such as catalog, promotions, pricing, cart and check-out). As Salesforce builds more products on its core (Salesforce platform) and provides more core-based shared services that work across both stacks (e.g., new concierge GPT functionality and data intelligence functionality in Business Manager for B2C), B2C customers’ noncore footprint will continue to be reduced as their core footprint increases. B2C customers can decide whether or when to adopt the new products. This will likely result in a separate project with a solution integrator to complete this work.
- **Additional licenses:** Salesforce requires clients to purchase additional licenses to other Salesforce products for some basic commerce functions. For example, the OMS module is required for some physical-store connection functionality, such as product picking for buy online, pickup in store (BOPIS) orders. B2B customers seeking the ability to respond to quotes need to purchase Salesforce Sales Cloud licenses. The subscription functionality exists in a separate PBC within Revenue Cloud. Data Cloud (Salesforce’s CDP) is also a separate cost.
- **B2B pricing:** Salesforce B2B Commerce Cloud customers must purchase user licenses for buyers on the platform, in addition to paying for the platform on a per order or GMV percentage

basis. This is a pricing lever not used by most B2B-focused vendors in this Magic Quadrant. Gartner clients frequently express confusion with the pricing levers used in Salesforce B2B Commerce Cloud quotes. Salesforce has announced an additional new SKU for commerce priced on GMV-only as an option, which will be available on 15 August 2023.

Sana Commerce

Sana Commerce is a Niche Player in this Magic Quadrant. Sana Commerce Cloud is its B2B-oriented digital commerce offering, which is most frequently deployed as a single-tenant application on Microsoft Azure infrastructure. Customers also have the option of self-hosting it on their choice of public cloud, although few choose this option. Sana also offers a native all-in-one payment platform optimized for B2B, Sana Pay, included in its licensing cost. An advanced version, Sana Pay+ (which automates payment flows and provides analytics), and Sana Commerce Insights, a native analytics tool, are add-ons for an additional cost. Sana's primary clients are midtier B2B distributors, wholesalers and manufacturers with either Microsoft or SAP ERP applications. The vast majority of Sana's clients are in Europe and North America.

Strengths

- **ERP-first approach:** Sana's core strength has always been its ERP-first integration approach. It provides prebuilt ERP connectors for real-time (two-way) synchronization of data sources such as catalog, orders and customer information for simplifying data maintenance and driving customer-specific products and pricing. This is particularly useful for organizations that use their ERP as their primary data source and are looking to enable a B2B commerce solution without any customization, third-party middleware or replication of their back-end capabilities.
- **Independent software vendor (ISV) integrations:** Sana takes full responsibility to support and maintain 100+ prebuilt integrations on its cloud infrastructure. It has a dedicated team for each ISV integration that certifies and updates each of these prebuilt plug-ins.
- **Headless storefront:** Sana Commerce Cloud supports a headless storefront natively via GraphQL APIs, and this is a unique capability for a B2B-only digital commerce platform. It also provides a CMS with a drag-and-drop Visual Designer that is fully productized within the platform, and manages SPA and PWA storefronts.

Cautions

- **Less multisite support:** Business users have to request Sana to set up additional storefronts. Additionally, page templates (such as homepage and product pages) and product definitions are set up manually rather than being inherited from an initial original store. This is primarily due to the ERP being specific to a storefront since all the data is pulled from there.
- **Basic search management:** Sana's search tooling is basic. In addition, since it is closely integrated with the ERP application, merchandisers need to create new facets and filters by mapping new fields from the ERP. The tooling also lacks some standard search functionalities such as boosting/burying, search analytics and rule-based search personalization.

- **Unsophisticated workflow management:** Sana's B2B workflow engine is basic compared to competitors', and does not provide capabilities to manage or build workflows. It has a basic workflow for order approvals, but this is not configurable nor extensible by customers.

SAP

SAP is a Leader in this Magic Quadrant. It offers SAP Commerce Cloud, a hybrid single-tenant PaaS platform hosted on Microsoft Azure, augmented by multiple multitenant SaaS components. These components include SAP Intelligent Selling Services (ISS) for search and merchandising, SAP order management services (OMS), SAP omnichannel pricing and promotion service (OPPS), and SAP Recommerce for selling preowned items. SAP Commerce Cloud includes a basic PIM, workflow engines and subscription selling in the same platform. Customers can also choose the Composable Edition that has fewer modules for a lower price. SAP has customers in many geographies and industries, with the top verticals being retail, business and consumer services, and wholesale. The commerce platform is commonly deployed by larger B2B and B2C organizations that have deployed SAP's ERP.

Strengths

- **Modern UI:** The admin dashboard has a modern look and feel, and guided wizards are available across most workflows (such as user management, catalog, content, pricing, promotions, search and site) to help customers navigate through a comprehensive set of functions.
- **Catalog management:** The native product content management (PCM) offers built-in data quality, status view and comparison tools to allow easy drill-down and data enrichment. It offers drag-and-drop to edit categories and product groups, and supports global and local catalogs with governance workflows.
- **Complex use cases:** SAP suits organizations with complex catalogs, complex business processes and multiple business models where they can manage everything in one place. The multisite concept is embedded across functions, including roles, content, catalog, pricing, promotions and search so users can configure multiple locales from a central dashboard.

Cautions

- **Monolithic core:** The core commerce platform is still a monolith, with only a few decoupled modules: intelligent selling services for search and merchandising, OMS, omnichannel pricing and promotion, and SAP Recommerce. More modules are on the roadmap for 2023.
- **Limited decoupled-storefront capabilities:** The Composable Storefront (formerly "Spartacus") is based on the Angular framework, which works OOTB with its SmartEdit CMS. Customers wanting a React-based storefront and to take advantage of SmartEdit will need extra effort to retool with third-party plug-ins or via custom-built storefronts.
- **Greater integration efforts required:** Since many features are included in the commerce platform or leverage SAP's other products, SAP has fewer preintegrated third-party applications than some vendors in this evaluation. This creates extra integration efforts for customers who want to use best-of-breed solutions.

SCAYLE

SCAYLE continues to be a Niche Player in this Magic Quadrant with its SCAYLE Commerce Engine that includes marketplace operations with product syndication, OMS, payment, DAM, PIM and its headless storefront (Vue.js). The engine can also be purchased with these add-ons: customer care, price approvals, subscriptions, partner portal (supporting marketplace operations) and unified commerce via an omnichannel plug-in. The engine is modular and microservices-based with REST APIs, and is deployed as single-tenant SaaS on AWS. SCAYLE serves predominantly retail clients with some wholesale clients. It serves a broad range of company sizes, with clients' GMV sales ranging from \$10M to over \$1B.

Strengths

- **Modern architecture:** The SCAYLE Commerce Engine is designed using an API-driven and modular approach. It has event-driven architecture with autoscaling to handle extreme workloads. It uses AI to monitor performance thresholds and to make adjustments based on historic performance levels. It includes an "add-on" framework for entry points into external systems.
- **Flexible product data model:** SCAYLE Commerce Engine supports custom data types using its schema builder which is type-aware. SCAYLE provides custom data schemas for all relevant entities – such as customers, products, variants, prices, shops, navigations and categories – which enables clients to extend the data model.
- **Broad product features:** SCAYLE has a broad set of offerings that are quite robust – such as catalog management, PIM, DAM, marketplace operations with product syndication, distributed order management (DOM) and unified retail capabilities. It also offers native support for B2B2X and has recently added subscriptions, additional functionality for product bundling and configuration, and "discount wallets." Some product shortcomings remain around personalization and AI, and CMS.

Cautions

- **Limited geographical and ecosystem breadth:** SCAYLE is a European company, serving predominantly European clients – although it has made some advances into North America. It currently serves just two verticals (retail and wholesale) with mostly B2C clients. Its supporting application ecosystem is small compared to others and is missing technology partners in some areas: clienteling, CPQ, low-code platforms, mPOS/POS, promotions engine, punchout, tax/VAT, visual configuration, translation services and virtual customer assistant/chatbot.
- **Limited B2B functionality:** The SCAYLE Commerce Engine has limited support for B2B capabilities, missing a large majority of those examined in this research. Clients needing support for B2B sales will need to examine functionality closely – particularly in areas related to workflow, RFQ and account approvals.
- **Lack of embedded AI:** SCAYLE has limited AI usage within its commerce engine, and none for personalization. Personalization capabilities that are largely product-based (e.g., similar

products, same brand, same collection) must be set manually. Clients needing sophisticated personalization will need a partner.

Shopify

Shopify is a Leader in this Magic Quadrant. Shopify offers a broad product portfolio including solutions for payments, POS, social and marketplace integration, and financing. Shopify Plus, the offering reviewed in this Magic Quadrant, has a global reach, but most of its customers are in North America. Shopify Plus primarily serves retail and brand clients that are midsize and large companies, but Shopify seeks to sell the platform to more enterprise companies in the future. In October 2022, Shopify acquired Remix, a startup developing an open-source web framework.

Strengths

- **Consolidated offering:** Shopify offers a robust set of B2C-specific, natively integrated tools, including a headless commerce platform, a front-end development framework and SDK for storefront creation, a native payment offering, and social commerce integration.
- **Upmarket focus:** Shopify has released functionality in the past year to help the company target the enterprise space. New functionality includes B2B-specific functionality, ERP integrations and improved modularity with Commerce Components. For instance, Shopify enables customers to use cart and check-out independently.
- **Speed of innovation:** Shopify currently has 4,500 R&D employees and a 2022 R&D budget of \$1.38B (a 75% increase compared to the previous year). In 2022, Shopify made approximately 100 minor point releases plus major enhancements, including Commerce Components to address the need for modularity, social commerce integrations with YouTube, and Shopify Audiences for custom audience lists.

Cautions

- **Lack of core B2B functionality:** Shopify offers some B2B-specific functionality, but is lacking the core functionality needed for many B2B companies, such as configurable approval workflows, RFQ at the line-item level, and account- and user-specific spending limits. Shopify also lacks an order-based pricing model option, which is required by many B2B companies.
- **Lack of robust multisite functionality:** Shopify is relatively weak in this area relative to competitors. For example, Shopify does not offer the ability for a business user administrator to set up an additional site and share products across multiple sites.
- **Go-to-market (GTM) realignment:** Shopify recently shifted its GTM strategy by selling its logistics business to Flexport, reversing a build-out since 2019. The company also slashed 23% of its workforce (including its logistics business) as it refocuses on its core business. End-user organizations should monitor the direction of the company's future investments.

Shopware

Shopware is a Visionary in this Magic Quadrant. Shopware 6.5 Commerce Cloud is based on the PHP Symfony framework. It is commercially licensed for on-premises and cloud deployments, as either SaaS or managed/hosted. An open-source community version is also available; however, the B2B suite is only part of the commercial versions. Shopware operates mostly in EMEA, with a focus on DACH countries (Germany, Austria and Switzerland), but is expanding to other areas of Europe, North America and Asia/Pacific. Shopware's target segments are midsize B2C retail and branded manufacturers, but the company increasingly supports B2B companies in a broad range of industry verticals.

Strengths

- **Ease of use:** Shopware's admin UI is one of the easiest to use and most coherent among the vendors in this research.
- **Deployment options:** Shopware can be consumed as SaaS, deployed fully on-premises or all options in between. SaaS provides versionless continued innovation, and self-hosted provides ultimate flexibility and customizability.
- **B2B innovations:** Shopware provides some innovative tooling for simpler B2B scenarios. Flow Builder provides a visual workflow tool (for both B2C and B2B), and Guided Shopping realizes the concept of the digital sales room (DSR) within a commerce platform. This enables sales teams to engage with customers on a live basis, either individually or as a group.

Cautions

- **Monolithic architecture:** Shopware remains largely a monolith at its core. While this can make consumption and, especially, use by the open-source community easier, it reduces flexibility and agility for enterprises that may desire a more modular, composable platform.
- **Limited unified retail commerce:** Shopware's capabilities for physical-store integration are weak compared to competitors', and rely on third-party integrations.
- **Midmarket focus:** The majority of Shopware's customers have less than \$100M in annual GMV. Only a small percentage of Shopware's customers are large enterprises with over \$250M in annual GMV.

Spryker

Spryker is a Visionary in this Magic Quadrant. Spryker Cloud Commerce OS is a multitenant platform offering a SaaS core, with extensibility via a single-tenant PaaS environment. Spryker Cloud Commerce OS is deployed on AWS infrastructure and supports Microsoft Azure and Google Cloud Platform as options. Spryker also offers a front-end development tool (the Composable Storefront Service), a hub for preintegrated applications (App Composition Platform [ACP]) and a marketplace operation application (Spryker Enterprise Marketplace) as multitenant SaaS applications, at additional cost. Spryker supports and has clients with B2B, B2C and enterprise marketplace business models in all major geographic regions. Its highest concentration of clients are in manufacturing, retail and distribution.

Strengths

- **Modern architecture for complex business models:** Spryker is one of the few vendors that offers a modern, modular architecture yet also serves enterprise-level clients with B2B and/or marketplace business models.
- **App composition platform:** Spryker's ACP is one of the few offerings in the market that seeks to make composable implementations easier by offering preintegrated solutions. With ACP, Spryker manages Level 1 support, and is responsible for application uptime and contracting. Spryker provides access to a good set of tools and middleware to enable clients seeking composability instead of merely APIs.
- **Growth and scale:** Spryker is one of the fastest growing vendors in this Magic Quadrant, boasting a high percentage of its customer base generating more than \$100M in annual GMV, relative to most direct competitors'. This speaks to potentially increased viability and rate of innovation if growth revenue is reinvested.

Cautions

- **Weaker product discovery and personalization functionality:** Despite some large B2C clients, Spryker's capabilities around promotions, search and personalization are all weak relative to direct competitors'. An in-store fulfillment app is new (released in 1Q23).
- **Low market presence:** Spryker has many large customers, but its total customer base and number of solution integration partners are lower than their direct competitors'. Spryker is not as well-known as most of its direct competitors.
- **Fewer industry-specific solutions:** Spryker's clients are not as diverse in their industry designation as other direct competitors'. Spryker has focused on fewer industries and therefore has fewer industry-specific solutions and accelerators than direct competitors. Prospective clients may find difficulty in finding reference customers outside of retail, manufacturing and distribution.

THG Ingenuity

THG Ingenuity (part of THG) is a new entrant and Niche Player in this Magic Quadrant. THG Ingenuity is a multitenant SaaS offering comprising core commerce components called Elysium (store management and OMS), Personify and Checkout. Within THG Ingenuity, clients also have access to a broad range of adjacent functionality. This includes a native mobile app, fraud detection (Detect), an OMS, logistics and fulfillment (Delivered), in-store fulfillment (Omni), and a customer services app (Orbit). THG Ingenuity is deployed on THG's own private cloud environments and is built using a microservices architecture. THG Ingenuity requires a fixed fee setup charge, and then charges a percentage based on expected GMV throughput. Operational support is available at extra cost. Most of THG Ingenuity's clients are in Europe, but it also has customers in North America and APAC. THG Ingenuity mainly serves fast-moving consumer goods (FMCG), fashion, beauty and personal care manufacturers and brands going D2C. Most of

its customers are small to midsize brands (under \$10M GMV), though a few larger brands also use the platform.

Strengths

- **Commerce as a service:** THG Ingenuity has an end-to-end platform providing all that's needed for B2C (and D2C) digital commerce. Clients can also take advantage of operational services managing the stores, THG Ingenuity becoming a merchant of record (MoR), and digital marketing – making THG Ingenuity a potentially “hands off” solution.
- **Unified retail commerce:** THG Ingenuity contains a native store fulfillment package for BOPIS/click and collect/dispatch from store. Returns can also be managed from within the platform.
- **Native loyalty management:** THG Ingenuity has built a loyalty application into its core platform, aligned to its internal personalization engine, which is rare among digital commerce vendors.

Cautions

- **Hard-to-navigate business-user tooling:** The admin UI for THG Ingenuity can seem hard to navigate, with several UIs and sub brands that are disconnected. Users have reported clunky usage and some missing capabilities, such as bulk product changes requiring spreadsheet download/upload.
- **Limited verticals and geography:** THG Ingenuity's focus on retail and brands means that this platform is inexperienced with those in wider B2C verticals or in B2B. The platform remains highly regional, with the vast majority of clients in the U.K./Europe.
- **Lack of advanced personalization functionality:** THG Ingenuity lacks advanced personalization functionality compared to other vendors in this evaluation. The vendor has a small ecosystem of partners and relies on an integration to Qubit at extra cost for advanced features.

Unilog

Unilog is a Niche Player in this Magic Quadrant. Its digital commerce product CX1 CIMM2 is an all-in-one B2B and B2C single-tenant SaaS solution deployed on Google Cloud Platform. Unilog is continuing a multiyear product upgrade project that will offer multitenant and headless capabilities. Unilog also offers a product content subscription program as well as product content enrichment services at additional cost. Unilog's customers are primarily small and midsize businesses (SMBs) in the U.S. with an annual GMV of less than \$10M. They tend to be B2B and B2B2X organizations in the distribution, wholesale and retail verticals.

Strengths

- **PCM focus:** Unilog's primary strength is its ability to provide product content management tooling and services to its customers. It provides all of the necessary capabilities natively available in the platform – such as predefined product categorizations, descriptions and visual CMS capabilities – that are required to manage and present product information for small to medium distribution businesses.

- **Proposal builder:** Unilog's SPEX Builder tool allows sales associates to create PDF-based proposals generated by the system that include product images and other essential information, and share them with their customers via an editable email template.
- **B2B-focused search:** Unilog's search capabilities are extensive and B2B-centric. The vendor provides some advanced capabilities such as displaying static content (events, promotions, etc.) on search results along with product results. It also uses a built-in popularity score to rank relevant search results. Unilog has native visual search capabilities – a unique feature among the platforms analyzed in this report.

Cautions

- **Lack of headless storefront:** Unilog does not natively provide a headless storefront. It also lacks native tooling to manage SPAs and mobile apps, although native apps for both iOS and Android are available for an additional cost or can be achieved through third-party integrations.
- **Limited SI partnerships:** Unilog does not have an extensive SI network; it tends to implement the solution for customers. This could be challenging for clients who are looking to implement and maintain their solution in-house or by using other agencies.
- **Limited advanced-commerce capabilities:** Unilog's B2B solution lacks advanced digital commerce capabilities expected by larger enterprises, such as complex B2B workflows, globalization, unified commerce and personalization.

VTEX

VTEX continues to be a Visionary in this Magic Quadrant with its multitenant SaaS commerce platform. The VTEX Commerce Platform packages 22 independent modules (each with its own data layer). It has five packaged business capabilities that can be purchased separately: Core B2B and B2C Commerce, distributed order management, marketplace and seller management, experience management, and the VTEX IO development platform. VTEX serves multiple verticals, with retail and manufacturing being the two largest. While it has consistently served smaller organizations in Latin America (many with annual GMV, adjusted for USD, of less than \$50M), it continues to add larger, international clients to its portfolio – some with annual GMV over \$500M.

Strengths

- **Modern platform:** VTEX offers a modular API-first platform, a headless CMS and a front-end development platform. In 4Q22, VTEX released its second option for headless use cases, FastStore. FastStore is a React-based storefront with a set of store components that can be managed via VTEX IO. VTEX receives high ratings from Gartner Peer Insights users in platform flexibility and modularity as well as in business model flexibility.
- **Support for unified commerce:** VTEX offers and enhances key functionality for retailers and manufacturers that includes VTEX Sales App, VTEX Pick and Pack, VTEX Live Shopping, and VTEX Conversational Commerce. It also has sophisticated promotion capabilities with margin protection, marketplace operations and management. In 4Q22, VTEX released a seller portal to

facilitate the onboarding of sellers and their management, and continues to improve its channel management and marketplace.

- **Extensive application-partner ecosystem:** VTEX offers a wide-ranging third-party ecosystem with integrations in various categories – most notably payment, shipping fulfillment, marketplaces and social channels. Its large application-partner ecosystem continues to grow, as do the number of “plug-in” integrations that it offers. For example, it has over 180 plug-ins for payment providers.

Cautions

- **Limited global and enterprise breadth:** While VTEX continues to expand its number of larger customers and its regional presence, large enterprise customers who are considering VTEX may be challenged to find similar reference customers (i.e., those matching industry, size, global reach, product complexity and locations). In 2022, 90% of VTEX’s revenue – and a large majority of its employees, partners and customers – were from Latin America; a high percentage of its customer base has GMV, adjusted for USD, of less than \$50M.
- **Pricing construct:** The new (2023) VTEX pricing structure includes not only separate GMV percentage fees for B2B and B2C, but also an annual platform fee. Those using marketplace integrations will find a separate GMV percentage fee for items sold on third-party marketplaces. While the new VTEX pricing provides more options, it increases deal complexity compared to other vendors.
- **Lack of CX personalization:** The VTEX commerce platform does not include AI- or rule-based personalization for CX. While it supports customer-segment or customer-cluster-level promotions and search results, it does not support personalization at the individual-shopper level with real-time presentation layer changes. VTEX relies on third-party integration for this functionality.

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

- THG Ingenuity

Dropped

- Optimizely was dropped because it failed to achieve the required combination of year-over-year (YoY) customer growth and total license revenue for its digital commerce platform. However, Optimizely is included below as an Honorable Mention.

Inclusion and Exclusion Criteria

The inclusion criteria represent the specific attributes that Gartner analysts deemed necessary for vendors to satisfy in order to appear in this Magic Quadrant. To be included, each vendor had to satisfy the following inclusion criteria, defined by Gartner, as of 31 March 2023:

- 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, vendors had to satisfy one of the following three scenarios for YoY customer growth, revenue growth and total revenue for their digital commerce platforms.

Scenario 1:

- Net new digital commerce platform customers during 2022: More than five
- Annual recognized digital commerce software revenue in 2022: Equal to or greater than \$20 million
- Growth in annual recognized digital commerce software revenue from 2021 to 2022: Greater than 20%

Scenario 2:

- Net new customers in 2022: More than five
- Revenue in 2022: Equal to or greater than \$50 million
- Revenue growth from 2021 to 2022: Greater than 10%

Scenario 3:

- Net new customers in 2022: More than five
- Revenue in 2022: 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 2021. 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 150 vendors in this market. Eighteen 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, of the inclusion criteria (each vendor failed to achieve the required combination of YoY customer growth and total license revenue for its digital commerce platform):

- **Intershop:** 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 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 digital commerce platform serving clients that sell apparel, footwear, accessories, cosmetics, jewelry, sports equipment, outdoor goods, home goods, and kids and baby products. NuORDER is a multitenant SaaS platform that helps merchandisers build seasonal assortments and facilitate wholesale transactions between brands and buyers in large and midsize organizations. NuORDER offers an embedded payments engine, a digital catalog and native virtual showrooming functionality within the platform to provide a unified commerce platform for retailers and suppliers.
- **Optimizely:** Optimizely sells two digital commerce platforms, Configured Commerce and Customized Commerce, alongside other CX capabilities such as a DXP and CDP. Customized Commerce is a hybrid PaaS/SaaS solution with a heritage as Episerver Commerce. Configured Commerce is a renaming from the Insite acquisition and is single-tenant SaaS. As per the naming convention, one is for customers with tech teams that want to customize the platform, whereas the other is aimed at those requiring a more packaged, opinionated, configured solution. In addition, Configured's main heritage and focus has been B2B, whereas Customized is more of a commerce framework (requiring a full-stack development team) with OOTB features focused on B2C.
- **Sitecore:** Sitecore acquired commerce vendor Four51 and its OrderCloud platform in April 2021. Sitecore subsequently retired its previous digital commerce platform, Sitecore Experience Commerce, last included in this research in 2019. Sitecore OrderCloud is a headless multitenant SaaS application. It is most often bundled with Sitecore Discover, from the Reflektion acquisition in September 2021, which provides search and product discovery as well as personalization capabilities. Both products form part of Sitecore's overall DXP strategy.

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, market responsiveness/record, and customer experience 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, and operationally there is lower differentiation than among services companies.

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
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 (August 2023)

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.

The weighting of the geographic strategy criterion has dropped from medium to low this year. As more companies adopt work-from-home processes, the need for local employees is less important than it was last year.

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

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

Source: Gartner (August 2023)

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. Challengers may focus on fewer industries, geographies, technology deployment methods or business models. These vendors are often highly respected. They invest in technological innovation that is key to their target markets. They use their research and development resources, 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. 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. They often win new customers quickly because they have identified an underserved niche in the market – one not addressed by Leaders or Challengers. 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 things. 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 in several years, we did not adjust the inclusion thresholds for this research.

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 the total cost of ownership (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 platform, 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 140-plus other vendors we track that do not appear in this research. Use the Critical Capabilities to rank vendors' products by particular functional and nonfunctional criteria.

Market Overview

Slowed Growth of Digital Commerce

The digital commerce market reached \$9.98 billion in software revenue in 2022, representing 11.2% YoY growth. This is half its growth pace in 2021, halting the aggressive growth seen in the past few years. High inflation, strong currency exchange headwinds and economic uncertainties caused businesses to scrutinize additional spending further. With the return of physical commerce, investment priority shifted from new technology adoption to consolidation of multiple touchpoints throughout the buyer's journey, enrichment of the respective customer experience and stronger integration with legacy systems. Gartner expects digital commerce market growth to return to 16.7% in constant currency in 2023 as businesses continue to grow their digital strategy.

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. Inquiries from Gartner clients about digital commerce strategies, architectures, trends, platforms and ecosystem applications have been consistently high for several years, and this trend continued in 2022.

B2B Hybrid Seller-Assisted Interactions

Growth in B2B digital commerce continues to outpace growth in B2C digital commerce. This is because clients are thinking about solutions that are not used solely for simple cart-based transactions but also for complex B2B sales that sometimes involve other systems (such as CPQ

and sales force automation) and humans in the loop. We are witnessing the emergence of seller-assisted interactions – hybrid selling scenarios where “self-service” B2B is supported by sales agents, often using a digital sales room (DSR). We expect more convergence of B2B digital commerce and sales (revenue) technology.

Commerce as a Service

Despite the need to integrate digital commerce platforms with many other applications, prebuilt integrations from commerce platform vendors are frequently lacking, which causes companies to continue to heavily utilize SIs, or to attempt to integrate applications themselves. The pandemic prompted many organizations to embark on digital business transformations quickly and with less investment upfront. Although the trend toward composability continues for digitally mature organizations, we are also seeing an uptick in the use of more packaged, “end-to-end” solutions. These can also extend to operational support for the platform and related product and digital marketing activities, hence the recent introduction of both SCAYLE and THG Ingenuity to this research.

Acronym Key and Glossary Terms

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
CMS	content management system
CPQ	configure, price and quote
CX	customer experience
D2C	direct to consumer

DAM	digital asset management
DOM	distributed order management
DSR	digital sales room
DXC	digital experience composition
DXP	digital experience platform
FEaaS	front end as a service
GMV	gross merchandise value
MACH	“microservices, API-first, cloud-native SaaS, headless” – the tagline of the MACH Alliance, an industry body dedicated to promoting this approach. Gartner rephrases this to: “modular, API-first, cloud-native, head-decoupled”
MXDP	multiexperience development platform
NLP	natural language processing
OMS	order management system
PaaS	platform as a service
PBC	packaged business capability within a composable solution
PIM	product information management
POS	point of sale
PWA	progressive web app
RFQ	request for quotation
SaaS	software as a service
SI	systems integrator

SPA	single-page application
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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 April 2022 to 30 April 2023.
- 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 2022 and the first five months of 2023.
 - Generally available sources of information.
- The Gartner State of the Union for Digital Commerce Survey, an online survey conducted in 2017, 2019 and 2021 across multiple regions and industries.

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.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through

partners, channels and subsidiaries as appropriate for that geography and market.

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