

# Magic Quadrant pour le commerce numérique

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Le chiffre d'affaires du marché des plateformes de commerce numérique a connu une croissance record de 22% en 2021. Ce Magic Quadrant évalue 18 fournisseurs de plateformes de commerce numérique pour aider les responsables d'applications à prendre des décisions éclairées.

## Hypothèses de planification stratégique

D'ici 2023, les prix des plateformes de commerce numérique B2C seront inférieurs de 30% à ceux de 2019, en raison de la banalisation des fonctionnalités et des implémentations « headless ».

D'ici 2024, 15% des organisations B2B utiliseront des plateformes de commerce numérique pour soutenir à la fois les clients et les commerciaux dans toutes les activités de vente.

D'ici 2024, 10 % des organisations de commerce numérique utiliseront des fonctionnalités commerciales packagées pour construire leurs expériences applicatives.

D'ici 2024, les coûts informatiques de gestion des opérations SaaS seront réduits de moitié grâce à l'adoption d'architectures applicatives composables.

D'ici 2025, les organisations offrant une expérience de commerce unifiée en déplaçant sans friction les clients à travers les parcours verront leur chiffre d'affaires total augmenter d'au moins 20 %.

## Définition/description du marché

La vision de Gartner sur le marché du commerce numérique se concentre sur les technologies transformatrices qui aident les organisations à offrir des expériences d'achat exceptionnelles à leurs clients.

Gartner définit une plate-forme de commerce numérique comme la technologie de base qui permet aux clients d'acheter des biens et des services grâce à 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 ordres de paiement à prix plein.

Pour être évaluées dans ce Magic Quadrant, les plates-formes des fournisseurs devaient disposer d'une capacité prête à l'emploi pour fournir, ou d'API pour prendre en charge, une expérience de commerce interactif en libre-service qui comprend la vitrine, la navigation dans le catalogue de produits, les pages produits, le panier d'achat, le paiement et le compte client. Prêtes à l'emploi, les plates-formes devaient également prendre en charge 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. En outre, les plates-formes devaient prendre en charge l'interopérabilité avec les fonctionnalités des clients, des produits, du contenu et des commandes, ainsi qu'avec les données via des API.

Plusieurs fournisseurs couverts dans ce Magic Quadrant évoluent pour devenir des fournisseurs de solutions plus modulaires et API-first. Pour des explications et des définitions du commerce modulaire, du commerce composable et du commerce numérique basé sur des API, voir [Hype Cycle for Digital Commerce, 2022](#).

## Magic Quadrant

Figure 1 : Magic Quadrant pour le commerce numérique



## Forces et mises en garde des fournisseurs

### Adobe

Adobe est leader dans ce Magic Quadrant avec sa plate-forme Adobe Commerce. Adobe Business Intelligence et Adobe Payment Services peuvent être ajoutés moyennant des frais supplémentaires. Adobe Commerce peut également être fourni avec Adobe Experience Manager (AEM), qui inclut les solutions de gestion de contenu et de gestion des ressources numériques (DAM) d'Adobe. La plate-forme Adobe Commerce peut être déployée sur site, sur des clouds publics ou sur des clouds publics avec les services gérés d'Adobe. Les versions cloud sont disponibles dans le monde entier sur Amazon Web Services (AWS) et Microsoft Azure. Adobe dessert un large éventail de secteurs, notamment la fabrication, la vente au détail, les sciences de la vie et la santé. La grande majorité des clients d'Adobe ont des ventes en ligne inférieures à 50 millions de dollars en valeur brute annuelle des marchandises (GMV), bien que les plus gros clients utilisent également sa plate-forme. Les clients Adobe existants devraient envisager d'utiliser Adobe Commerce, en raison de sa synergie avec AEM et d'autres produits Adobe. Les moyennes et grandes entreprises qui souhaitent mieux contrôler leurs activités de commerce numérique devraient également envisager Adobe Commerce.

### Forces

- **Étendue du commerce** : Adobe Commerce est riche en fonctionnalités, notamment en B2C, B2B et B2B2C. Les fonctionnalités natives de la plate-forme incluent un constructeur de pages qui fonctionne avec PWA Studio d'Adobe, des flux de travail, la segmentation et la personnalisation, la fidélité et les récompenses, des recommandations, une configuration multisite en libre-service et un accélérateur de fabrication pour les modèles basés sur les concessionnaires. Adobe s'appuie sur un vaste écosystème d'applications mondial et un réseau de partenaires intégrateurs de systèmes (SI), qui est encore renforcé par la compatibilité avec d'autres produits Adobe.
- **IA intégrée** : l'IA est intégrée à Adobe Commerce pour fournir des informations basées sur les données qui surveillent en permanence l'expérience client (CX) et les activités commerciales. Il signale automatiquement les zones nécessitant une attention particulière, telles que l'augmentation des abandons, les abandons de sites, les problèmes de vérification et les diminutions de la vitesse d'inventaire, garantissant ainsi que les sites fonctionnent de manière optimale.
- **Personnalisation cross-canal** : Adobe Commerce prend en charge en mode natif les promotions personnalisées, les e-mails et les recommandations de produits dynamiques. Des fonctionnalités supplémentaires sont disponibles dans Adobe Target via Adobe Experience Platform Data Connector, ce qui simplifie la personnalisation cross-canal.

### Précautions

- **Processus de mise à niveau** : bien qu'Adobe ait publié un outil de compatibilité des mises à niveau capable d'identifier automatiquement les endroits où des conflits peuvent survenir entre

l'implémentation actuelle d'une entreprise et une version récente, Adobe ne fournit par ailleurs qu'un plan de projet détaillé pour la mise à niveau, avec des actions recommandées. Les clients Adobe sont toujours tenus d'effectuer les mises à niveau. La plupart des clients de Gartner déclarent qu'ils utilisent deux ou trois versions derrière la version la plus récente.

- **Fonctionnalité B2B** : Bien qu'Adobe continue de mettre à niveau son offre B2B, certaines fonctionnalités font toujours défaut. Les exemples incluent la possibilité d'empêcher la quantité de commande de dépasser l'allocation budgétaire du client, la possibilité pour les approbateurs de commandes de combiner plusieurs demandes pour obtenir des remises sur volume et une offre native de configuration, de prix et de devis (CPQ).
- **Utilisation de plusieurs produits Adobe par les grandes entreprises** : Adobe compte moins de clients générant plus de 250 millions de dollars de GMV annuel que les autres leaders de ce Magic Quadrant. Les entreprises dont le GMV dépasse ce chiffre doivent rechercher des clients de référence applicables, en particulier si elles prévoient d'utiliser plusieurs produits Adobe.

## **BigCommerce**

BigCommerce est un challenger dans ce Magic Quadrant avec sa plate-forme de commerce numérique SaaS multitenant. La plate-forme est déployée principalement en Amérique du Nord, mais continue de gagner du terrain dans d'autres régions, en particulier dans la région EMEA et en Asie/Pacifique. BigCommerce a des clients dans presque tous les secteurs, mais les détaillants, les fournisseurs de services aux entreprises et aux consommateurs, les fabricants, les vendeurs de haute technologie et les entreprises de médias sont ses clients les plus courants.

BigCommerce attire des clients plus importants, dont certains réalisent des ventes de plus de 250 millions de dollars en GMV annuel, mais une grande majorité de ses clients en moyenne GMV annuel est inférieur à 50 millions de dollars. Les entreprises qui souhaitent accélérer la mise sur le marché (en particulier celles qui vendent directement aux consommateurs) et les entreprises de taille moyenne nécessitant à la fois des fonctionnalités B2B et B2C sur la même plate-forme devraient envisager BigCommerce, en particulier si l'extensibilité SaaS et API multitenant native du cloud est une exigence appréciée. BigCommerce a réalisé trois acquisitions depuis juin 2021 : Feedonomics (en juillet 2021), pour son application d'intégration de canaux ; B2B Ninja (en février 2022), pour sa création et sa gestion de devis ; et BundleB2B (en avril 2022), pour la gestion de ses comptes B2B, le soutien de l'équipe commerciale, les devis, la facturation et les paiements.

## **Forces**

- **Flexibilité**: BigCommerce offre une plate-forme cloud native avec des API GraphQL et REST et une architecture modulaire. Son architecture moderne est sans tête et entièrement découplée de la devanture. La fonctionnalité de commerce est disponible via des API, à quelques exceptions près liées à la sécurité.
- **Service et support**: Les examinateurs de Gartner Peer Insights ont attribué à BigCommerce des notes élevées pour le service et le support. Ils décrivent à plusieurs reprises leur expérience avec BigCommerce en utilisant des termes tels que « facile ».
- **Écosystème d'applications**: BigCommerce a de nombreux partenaires de l'écosystème d'applications et au moins une intégration native pour la plupart des types d'applications

pertinentes. De plus, de nombreux partenaires BigCommerce ont créé leurs propres adaptateurs, de sorte que les clients BigCommerce ont de nombreuses options.

### **Précautions**

- **Portée géographique:** Alors que BigCommerce renforce sa présence mondiale, en particulier dans la région EMEA, les clients mondiaux souhaitant poursuivre le commerce numérique doivent vérifier quel support est disponible et demander des clients de référence ayant une portée géographique similaire.
- **Soutien aux grandes entreprises:** Bien que BigCommerce ait obtenu de gros clients, seul un petit nombre atteint un GMV annuel de plus de 50 millions de dollars. Les grandes entreprises devraient demander des clients de référence de taille et de chiffre d'affaires estimés similaires.
- **Fonctionnalités natives :** certaines fonctionnalités courantes nécessitent des intégrations partenaires. Pour les clients B2C, cela inclut une fonctionnalité permettant d'activer « acheter en ligne, ramasser en magasin » (BOPIS) (également connu sous le nom de « click and collect »), la disponibilité des stocks en magasin et le clienteling. La fonctionnalité BOPIS est actuellement en phase de test bêta. La prise en charge multisite n'a été publiée que récemment. Pour les clients B2B, les fonctionnalités manquantes incluent la segmentation du catalogue, les limites de dépenses et les budgets par rôle.

### **CommerceOutils**

Commercetools est un leader dans ce Magic Quadrant. Il offre une plate-forme SaaS modulaire, API-first, multitenante, qui est principalement disponible sur Google Cloud Platform et AWS. Les clients peuvent exécuter leurs interfaces sur n'importe quel fournisseur d'infrastructure cloud majeur. En 2021, commercetools a acquis Frontastic - maintenant appelé commercetools Frontend - qui est vendu soit dans le cadre de l'offre commercetools for Growth, soit indépendamment. Commercetools a traditionnellement eu une forte présence en Europe, et sa présence en Amérique du Nord continue de croître régulièrement. Commercetools a relativement peu de clients en Asie/Pacifique. Commercetools sert des clients dans un large éventail d'industries, mais la plupart de ses clients nouvellement acquis en 2021 étaient dans le secteur de la vente au détail. Commercetools cible les grandes organisations mondiales, avec une bonne partie de ses clients ayant plus de 250 millions de dollars en GMV annuel. Les grandes organisations ayant des exigences complexes à la recherche d'une plate-forme basée sur des API devraient envisager commercetools.

### **Forces**

- **Influence MACH :** Commercetools est devenu un influenceur de premier plan dans l'espace de commerce composable avec ses principes architecturaux SaaS « microservices, API-first, cloud-native, headless » (MACH). La principale stratégie de commercialisation de Commercetools a été la promotion agressive de ces principes, principalement par le biais de l'Alliance MACH qu'elle a initiée avec Contentstack, Amplience, EPAM et Valtech en 2020. Commercetools convient aux entreprises intéressées par la création d'un écosystème de fonctionnalités de pointe, au lieu d'acheter une suite à fournisseur unique.

- **Essais gratuits:** Commercetools offre aux clients potentiels une version d'essai de production gratuite de sa solution de commerce complète pour une utilisation et une validation internes. Une fois que ces clients sont prêts à aller de l'avant commercialement, leur projet d'essai est signalé, puis converti en instance de production.
- **Storefront et constructeur de pages:** Commercetools Frontend offre un créateur de vitrine découplé avec la possibilité de prévisualiser les modifications en temps réel via un code QR sur tous les appareils, ce qui est une capacité unique parmi les fournisseurs de front-end as a service (FEaaS). Outre une interface utilisateur métier élégante, commercetools Frontend fournit des API pour se connecter à d'autres offres de système de gestion de contenu (CMS) / plate-forme d'expérience numérique (DXP) sans tête. Dans les précédents Magic Quadrants, commercetools a été critiqué pour son manque de fonctionnalités de vitrine et de création de pages pour accompagner son offre de commerce composable. Avec l'introduction de commercetools Frontend, ces capacités sont maintenant des différenciateurs pour ce fournisseur.

### **Précautions**

- **Fonctionnalité B2B:** Bien qu'il continue d'apporter des améliorations, commercetools est toujours à la traîne par rapport à ses concurrents directs en termes d'efforts pour offrir une solution B2B plus complète. L'absence d'une vitrine B2B (il existe une vitrine B2C) et les capacités limitées des utilisateurs professionnels pour les vendeurs font partie de ses lacunes.
- **Personnalisation et analyse natives :** Commercetools fournit peu de fonctionnalités natives de personnalisation et d'analyse. Cependant, il fournit des connecteurs prédéfinis à des fournisseurs tiers.
- **Complexité technologique :** les clients de Gartner signalent que la technologie de commercetools est complexe, coûteuse à mettre en œuvre et convient le plus souvent aux entreprises dotées de grandes équipes commerciales techniquement averties.

### **Chemin élastique**

Elastic Path est un visionnaire dans ce Magic Quadrant. Il propose deux plateformes de commerce : Elastic Path Commerce et Elastic Path Commerce Cloud. Elastic Path Commerce est disponible pour l'auto-hébergement par les clients, sur site ou sur l'environnement cloud de leur choix. Elastic Path Commerce Cloud (basé sur l'acquisition de Molting), une plateforme SaaS mutualisée, est la principale offre commerciale d'Elastic Path. Elastic Path Commerce Cloud a connu une croissance plus importante au cours de l'année écoulée qu'Elastic Path Commerce. Les clients d'Elastic Path sont principalement basés en Amérique du Nord. Le fournisseur est représenté dans divers secteurs, mais la majorité de ses clients sont dans la vente au détail et la fabrication. Traditionnellement, la plupart des clients d'Elastic Path utilisent leur solution pour les entreprises B2C, mais Elastic Path a récemment acquis des clients B2B et B2B2C pour Elastic Path Commerce Cloud. Les entreprises de taille moyenne ayant des exigences uniques en matière de merchandising de produits et de piles technologiques, et celles qui souhaitent innover rapidement en tirant parti d'une plate-forme modulaire, devraient envisager Elastic Path Commerce Cloud.

## **Forces**

- **Tarifification modulaire** : Elastic Path offre aux clients la possibilité d'acheter des modules spécifiques. Cela leur donne la flexibilité de choisir des capacités métier qui répondent à des exigences spécifiques.
- **Merchandising produit** : EP Product Experience Manager (PXM) d'Elastic Path est sa fonctionnalité la plus puissante et est au cœur d'Elastic Path Commerce Cloud. Le produit est particulièrement utile pour les clients qui ont des exigences complexes en matière de gestion de catalogue et de merchandising liées à la tarification des produits et à l'attribution dynamique pour plusieurs points de contact.
- **Prise en charge de la réussite des clients** : Elastic Path propose Composable Commerce XA (Experience Assurance) moyennant des frais supplémentaires, un service de support conçu pour réduire le risque lié à la gestion d'un environnement de solutions multifournisseurs. Il comprend le plan de l'architecture de la solution, les évaluations de l'état de préparation et le suivi des performances d'intégration.

## **Précautions**

- **Vitrines par défaut** : Elastic Path ne fournit pas d'expérience frontale native, mais fournit un magasin de référence d'applications web progressives (PWA) dans ReactJS, un magasin de référence Gatsby et un accélérateur Vue. Pour les entreprises qui souhaitent démarrer une nouvelle vitrine, cela pourrait ralentir le processus. Les clients peuvent toutefois utiliser des fournisseurs frontaux tiers (il existe des intégrations avec Builder.io et Vue Storefront, entre autres) ou créer leurs propres vitrines.
- **Nombre de clients et étendue régionale** : Elastic Path compte moins de clients que la plupart des autres fournisseurs de ce Magic Quadrant, même si son taux de croissance des revenus est stable. La plupart des clients d'Elastic Path ont leur siège social en Amérique du Nord.
- **Personnalisation** : les offres commerciales d'Elastic Path manquent de fonctionnalités de base pour la personnalisation. Le fournisseur s'appuie sur des partenaires tiers pour fournir cette fonctionnalité.

## **Logiciel HCL**

HCL Software est un challenger dans ce Magic Quadrant. HCL Commerce est une plate-forme hybride hébergée par un ou plusieurs locataires, avec des composants à locataire unique gérés par des clients HCL ou HCL sur toutes les principales plates-formes cloud. En plus d'un modèle de tarification basé sur la ligne de commande, HCL offre une option d'achat d'une licence perpétuelle unique, le type d'option qui est maintenant rarement proposée par les fournisseurs de plates-formes de commerce. HCL continue d'attirer de grandes entreprises avec un GMV annuel de plus de 250 millions de dollars en Amérique du Nord et en Europe, dans un large éventail d'industries, mais en particulier la vente au détail, la fabrication et les télécommunications. HCL doit être pris en compte pour les cas d'utilisation complexes et l'évolutivité pour les volumes de trafic et de transactions élevés associés aux modèles commerciaux B2B, B2C et B2B2X.

## **Forces**

- **Prise en charge des grandes entreprises complexes** : HCL compte de nombreux grands clients multinationaux, et ses capacités de plate-forme de base en sont le reflet. Des fonctionnalités multisites sophistiquées sont disponibles prêtes à l'emploi, et il existe un puissant moteur de promotion et une solution de base évolutive, désormais avec une mise à l'échelle automatique et un niveau de données cloud natif.
- **Tarification et support pour la réussite des clients** : HCL dispose de l'un des modèles de tarification les plus simples des fournisseurs de ce Magic Quadrant. Ceci, combiné à des preuves de concept gratuites disponibles via l'Innovation Factory (une offre de conseil groupée) et à un support client stratégique limité via le programme CX Studio (un service de conseil en intégration gratuit), facilite le lancement pour les nouveaux clients.
- **Découverte de produits** : après être passé au moteur de recherche Elasticsearch en 2020 et avoir continué à investir dans les capacités de recherche, HCL dispose désormais de l'un des ensembles de capacités de découverte de produits les plus solides des fournisseurs de ce Magic Quadrant. Il comprend le traitement du langage naturel (NLP), la gestion des résultats zéro et le merchandising visuel.

## **Précautions**

- **Interfaces utilisateur d'administration complexes** : la plate-forme de commerce mature et sophistiquée de HCL dispose d'interfaces utilisateur d'administration complexes qui sont moins conviviales que celles des autres fournisseurs de ce Magic Quadrant. Il peut être difficile de naviguer et d'utiliser sa plate-forme efficacement sans formation.
- **Composabilité** : Bien qu'il prenne désormais en charge la livraison « headless » via les frameworks React, ainsi qu'une nouvelle plate-forme de données client (CDP), HCL Commerce reste largement monolithique. La plate-forme de développement multiexpérience Volt MX (MXDP) à faible code est fournie, mais la plupart des utilisations de cette plate-forme ont été pour des déploiements spécifiques aux mobiles.
- **Technologie complexe** : Bien que l'exhaustivité de la technologie HCL puisse être nécessaire pour les grandes organisations ayant des exigences complexes, pour les organisations de taille moyenne ou régionales et celles ayant des exigences plus simples, elle pourrait ne pas être la mieux adaptée.

## **Infosys Equinox**

Infosys Equinox est un acteur de niche dans ce Magic Quadrant. Sa plate-forme Infosys Equinox (un produit anciennement appelé Skava Commerce) est une plate-forme modulaire, API-first avec 20 modules déployables indépendamment. Il est proposé sous la forme d'une offre SaaS multi-locataire, hébergée par un seul locataire ou sur site. Les options complémentaires, disponibles moyennant des frais supplémentaires, incluent Infosys Equinox Studio (une application de création de pages à faible code), Conversational Commerce, un outil d'administration d'entreprise simplifié pour les petites et moyennes entreprises et des services d'hébergement gérés. La plate-



forme Infosys Equinox est généralement vendue à des entreprises B2C d'entreprise avec des cas d'utilisation complexes de commerce numérique dans divers secteurs. Il convient aux entreprises qui utilisent déjà les services Infosys ou qui souhaitent utiliser Infosys comme SI principal pour le commerce numérique.

### **Forces**

- **Architecture MACH** : La plate-forme Infosys Equinox est construite sur une architecture MACH qui permet à chaque microservice d'être mis à l'échelle, mis à niveau et étendu dans le même conteneur. La plate-forme fournit également son propre frontal headless basé sur React et une interface utilisateur de back-office entièrement découplée. En outre, les clients peuvent acheter individuellement l'une des 20 fonctionnalités métier packagées (PBC).
- **Fonctionnalités complètes et contrôle d'accès** : La plate-forme Infosys Equinox dispose d'un ensemble complet de fonctionnalités pour gérer les promotions, les règles de tarification et les points de fidélité. Il dispose également d'une application native de notations et d'avis. De plus, Infosys Equinox fournit des fonctionnalités d'outil back-end pour chacun de ses modules (s'ils sont achetés individuellement) dans le cadre de son package d'entreprise, chacun avec son propre contrôle d'accès. Cela permet une meilleure gouvernance pour les organisations comptant un grand nombre d'utilisateurs.
- **CMS sans tête**: La plate-forme Infosys Equinox est l'une des rares plates-formes de commerce à disposer d'un outil CMS natif pour gérer le contenu et les métadonnées sans affichage. Il dispose également d'une application de création de pages low-code / no-code appelée Infosys Equinox Studio, qui est activée par API pour connecter des points de contact externes sans tête.

### **Précautions**

- **Écosystème de partenaires** : la plate-forme Infosys Equinox est presque toujours fournie avec les services d'intégration de solutions d'Infosys. Les organisations qui cherchent à utiliser un SI existant ou différent doivent évaluer la familiarité et l'expérience de leur SI avec Infosys Equinox.
- **Outil métier** : le support informatique est nécessaire pour configurer la plate-forme Infosys Equinox et configurer certaines fonctionnalités, par exemple lors de la configuration de nouveaux rôles utilisateur ou de la création de règles de segmentation et de personnalisation. Dans certains domaines, l'outil d'administration des utilisateurs professionnels est moins convivial que certains des outils des concurrents de ce Magic Quadrant.
- **B2B support**: Most of Infosys Equinox's customers are in the B2C sector. The Infosys Equinox platform lacks some B2B capabilities, such as support for requests for quotation (RFQs) and workflow management. It offers limited management of B2B roles and permissions.

### **Kibo**

Kibo is a Visionary in this Magic Quadrant. The Kibo Unified Commerce Platform is a multitenant SaaS solution that includes B2C, B2B, order management system (OMS), personalization and

point-of-sale (POS) capabilities — all of which can be purchased for one price, individually per module, or via precomposed bundles. The platform includes a reporting dashboard (supplied via an OEM relationship with Looker) and an integration platform (via an OEM relationship with Tray.io). Kibo's platform is deployed primarily in North America and EMEA. It caters largely to retailers but also serves clients in distribution, life sciences, manufacturing and wholesale, albeit in substantially smaller numbers. Kibo has customers of all sizes, but the majority have annual GMV of between \$50 million and \$250 million. Companies in the retail industry, or requiring native personalization and OMS capabilities, or seeking a more unified commerce experience for their customers, should consider Kibo.

### ***Strengths***

- **Modern architecture:** Kibo offers a unified commerce platform that includes 10 PBCs: product information management (PIM) with DAM, inventory visibility, order routing, recommendations, product discovery, subscriptions, testing and targeting, universal cart and check-out, pricing, and promotions. Kibo also includes a prebuilt integration to a decoupled storefront, all for one price.
- **Content management with workflow and scheduling:** Kibo's platform includes a native API-based CMS that enables clients to create page templates and layouts, custom content, and managed assets. The CMS can extend to other headless storefronts, mobile apps (both shopper and in-store devices) and custom mobile experiences. The CMS includes workflow and scheduling functionality for managing the creation, approval and publication of content.
- **Personalization:** Kibo's personalization suite, which includes A/B testing, machine learning, product recommendations and search capabilities, is included with the commerce platform license. Personalization is available for product recommendations, content recommendations, site search, type-ahead predictive search, category pages, layout recommendations and customer audience discovery.

### ***Cautions***

- **Geographic reach:** Kibo's sales employees, revenues and supporting SIs are predominantly in North America, with significantly fewer in Western Europe. There is also support in Japan. Availability for hosting is limited to the U.S., Ireland and Japan. Global clients wishing to pursue digital commerce worldwide should confirm the availability of support and ask for reference customers of similar geographic reach.
- **Supporting partners:** Kibo offers sporadic support for digital commerce application ecosystems, with fewer integrations than are available from most other vendors in this Magic Quadrant. Kibo has no prebuilt integrations or partners in some key areas, including CPQ, FEaaS, live commerce, price optimization, punchout, translation services and visual product configuration. However, Kibo does offer additional integrations through Tray.io. Additionally, Kibo has fewer SI partners than most of the other vendors evaluated.

- **B2B limitations:** Although Kibo's B2B functionality continues to improve, some expected functionality is still missing, such as the ability to prevent order quantity from exceeding customer budget allocation, identification of punchout buyers, support for EDI integration and CPQ integration.

## **Optimizely**

Optimizely is a Niche Player in this Magic Quadrant. It sells two products: Optimizely Commerce Cloud for B2C and Optimizely Commerce Cloud for B2B. The latter is its main offering and is the only Optimizely product evaluated for this Magic Quadrant. The platform is available as single-tenant SaaS deployed on AWS or Microsoft Azure; its other components, such as PIM, content optimization and analytics, are multitenant. Optimizely customers are mostly in EMEA and North America. They come from a wide range of industries, and are primarily midmarket and smaller B2B companies (with \$50 million to \$250 million in annual GMV). Alongside its core commerce platform, Optimizely sells a broad CX suite, including products for personalization and testing, a DXP and a CDP. Optimizely is suitable for businesses looking for a broad suite of digital experience and commerce capabilities from a single vendor. In 2021, Optimizely entered into a definitive agreement to acquire Welcome, to add a content marketing platform to its wider CX suite.

## **Strengths**

- **Experience management:** By introducing Optimizely Content Cloud integration and native CDP integration in 2021, Optimizely has improved its digital experience management capabilities for experience-driven commerce and customer portal use cases. The native integration with a DXP product is a differentiator for Optimizely.
- **B2B capabilities:** Optimizely provides a strong set of B2B features for the midmarket, including B2B-oriented product search, good RFQ workflow with in-platform communications, and role-based budget control.
- **Rule engine:** Optimizely Commerce Cloud for B2B has a no-code rule engine at its core. It enables rule-based approaches to personalization, promotions and other workflows.

## **Cautions**

- **Monolithic core:** Although search capability was decoupled in 2021, Optimizely's core B2B platform remains monolithic. The solution remains versioned, with monthly releases. Single tenancy gives customers some flexibility in the timing of upgrades, but this approach does not take advantage of the versionless, continual upgrades offered by some vendors' SaaS products. Optimizely's roadmap includes a shift to a SaaS-based platform with customer customizations in a separate container and the core platform controlled by Optimizely.
- **Suite-based proposition:** Although some customers may prefer a single-vendor solution, the trend is toward best-of-breed, modular, composable approaches. Optimizely's broad suite looks inward, not outward to a wider ecosystem of partners.

- **Storefront limitations:** Optimizely's new React-based CMS and decoupled storefront has limited flexibility and is not yet mature. Recent integration with Optimizely Content Cloud has brought a fuller DXP integration to the B2B commerce platform, but this integration does not include a React (or other front-end framework) solution. Therefore, for a customer to use the DXP, decoupled front ends must be custom-built.

## **Oro**

Oro is a Visionary in this Magic Quadrant. OroCommerce is bundled with OroCRM and sold together with the OroPlatform. OroCommerce is a single-tenant digital commerce platform that can be deployed on OroCloud, public clouds, private clouds and on-premises. Oro focuses on B2B businesses, but can also support B2C businesses. Although Oro has some large enterprise customers, the majority of its clients are midsize B2B organizations (with \$10 million to \$250 million in annual GMV) in Europe and North America. B2B digital commerce organizations should consider Oro, especially if they value a tightly integrated CRM system to support omnichannel CX and sales activities.

### **Strengths**

- **Catalog management:** Oro has robust PIM capabilities that enable users to control visibility by customer group and account, and to manage multiple catalogs, channels, attributes and variants. Catalog management works with Oro's DAM solution and page builder to enable business users to manage the look and feel of a catalog. The catalog can be previewed with easy visibility controls before publishing.
- **Workflow management:** Oro's workflow engine supports visualization, so business users can easily define states, conditions and events without creating additional roles or rules. It can be used for many processes, including product approval, RFQ, check-out, lead management, fulfillment and delivery.
- **Multisite and multiregion support:** OroCommerce can host multiple sites for B2B, B2C, B2B2X and marketplaces on a single instance, with granular control of catalog, content, customers, warehouse, check-out, payments and tax. Out of the box, it also has multicurrency and multilanguage capabilities.

### **Cautions**

- **Modularity:** Although OroCommerce has comprehensive capabilities, including PIM, DAM, workflow engines, a CMS and a marketplace, customers rarely choose to implement individual modules autonomously. Instead, they generally use the full platform.
- **Pricing:** Although Oro offers GMV- and order-based pricing, other factors, such as the number of users, SKUs, storage and deployment model, also contribute to the licensing cost. This makes Oro's pricing model quite complex, relative to those of other vendors in this Magic Quadrant.
- **Ecosystem and geographic presence:** Oro has relatively few service partners, compared with other vendors in this Magic Quadrant. Also, most of its partners and customers are in Europe

and North America.

## **Salesforce**

Salesforce is a Leader in this Magic Quadrant. Salesforce offers three commerce platforms: B2C Commerce, for companies with complex requirements that need a high level of scalability; B2B Commerce, for B2B companies; and B2B2C Commerce, for B2B Commerce customers who also want to sell directly to consumers. Salesforce also offers separate products, at additional cost, for order management, customer portals and payments. Salesforce has digital commerce customers in many geographies and industries, and serves clients ranging from midsize organizations to large enterprises. Existing Salesforce customers and other organizations seeking a broad range of capabilities and an extensive application ecosystem should consider using a Salesforce digital commerce platform. In February 2022, Salesforce signed a definitive agreement to acquire Atonit, a Brazilian technology company that offers a marketplace operation application and professional services.

### ***Strengths***

- **Shared Lightning services:** Salesforce invests in building what it calls “shared services” on its Lightning development platform, which can be used by any of its commerce platforms (examples are an inventory service, product recommendations and a native payments integration). To date, there are five shared services that can be used by each of the commerce platforms, and more are on Salesforce’s roadmap.
- **Industry offerings:** Salesforce offers industry-specific solutions that combine multiple Salesforce products to provide industry-specific data models and workflows. Salesforce’s breadth of offerings enables it to make these combinations and provide industry-specific solutions that many other vendors cannot.
- **Multisite functionality:** Salesforce’s B2C- and B2B-focused platforms excel at self-service multisite setup and administration. They include functionality for managing localization preferences such as language, currency and taxation method.

### ***Cautions***

- **B2C architectural transition:** Both established and new B2C Commerce customers use a core commerce technology stack that was not built on the Salesforce Lightning platform (for functional areas such as catalog, promotions, pricing, cart and check-out). As Salesforce builds more shared services on its Lightning platform, B2C customers will need to assess these services’ scalability for large-scale transaction volumes and decide whether or when to move to the new services.
- **Need for additional functionality:** Salesforce requires clients to purchase additional components for some basic commerce functions. For example, the OMS module is required for some physical-store connection functionality, such as product picking for BOPIS orders. Additionally, B2B customers seeking the ability to respond to quotes need to purchase Salesforce Sales Cloud.

- **B2B pricing:** Salesforce B2B Commerce 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.

## **Sana Commerce**

Sana Commerce is a Niche Player in this Magic Quadrant. It offers a platform called Sana Commerce Cloud, 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 targets B2B distributors, wholesalers and manufacturers with either Microsoft or SAP ERP implementations. The vast majority of Sana's clients are in North America or Europe. B2B companies seeking to enable digital commerce by extending their SAP or Microsoft ERP implementations should consider Sana.

### **Strengths**

- **ERP integration:** Sana uses the data in SAP and Microsoft ERP systems for almost all commerce activities. Sana offers native integration with almost all versions of ERP applications offered by SAP and Microsoft, including older versions predating 2010. Sana pulls data in real time from the ERP system, where necessary, and therefore does not replicate data in the digital commerce platform.
- **Total cost of ownership:** Because of the prebuilt integrations with ERP systems, Sana clients experience lower initial setup and launch costs, relative to platforms that require custom integration work or payment for third-party integration work.
- **Commerce-related insights:** Out of the box, Sana includes a data and analytics offering, Sana Commerce Insights, which uses online and offline data to inform strategic decision making. Sana Commerce Insights combines clickstream data with data pulled from an ERP system to help commerce practitioners evaluate the success of commerce sites in the broader context of their company's performance. Business users can customize the interface and embedded dashboards, and the functionality is more robust than that of most vendors in this Magic Quadrant.

### **Cautions**

- **ERP reliance:** Although Sana's ERP integration capabilities are beneficial for many B2B companies, companies that use other applications (for example, CRM systems) for workflows and systems of record will require custom integrations to derive the same value from Sana's approach.
- **SI availability:** Sana typically performs its own professional services work for customers. Although third-party SIs are available, they are not as prevalent as they are for many of the other vendors in this Magic Quadrant, especially in North America.
- **Commerce ecosystem integrations:** Sana lacks prebuilt integrations with several types of applications, including digital commerce search, CRM, DXP and punchout applications. Sana offers relatively few integrations for other areas, including CPQ and PIM.

## SAP

SAP is a Leader in this Magic Quadrant. It offers SAP Commerce Cloud, a hybrid multitenant SaaS and single-tenant hosted platform with platform as a service (PaaS) capabilities that uses Microsoft Azure infrastructure. It includes Intelligent Selling Services – a set of decoupled multitenant modules to enable personalization, commerce search, product recommendations and merchandising – as part of SAP’s journey toward a modular architecture. SAP has customers in many geographies and industries, with the most common being retail, consumer products and goods, distribution, and wholesale. SAP’s platform is commonly deployed in B2B scenarios at companies where SAP’s ERP solutions are also deployed. Companies with large product catalogs and/or complex use cases should consider SAP.

### *Strengths*

- **Content management:** SAP’s Product Content Management application is included in SAP Commerce Cloud licenses. It provides more complete functionality than the product management capabilities of most other commerce platforms assessed in this Magic Quadrant. It includes collaboration functionality, product workflows, data quality indicators and alerting. SAP also offers product syndication and channel integration through a partnership with Productsup.
- **Decoupled storefront editor:** The SAP Commerce SmartEdit application is included in the SAP Commerce Cloud license. It enables business users to create and edit pages in SAP’s decoupled front-end single-page application, Spartacus. This functionality can be used for B2C or B2B clients. It includes functionality for editing pages, viewing pages in different viewports and adding page components.
- **Enterprise support and autoscaling:** SAP supports large, global companies with a great deal of SKUs, traffic and revenue running through the platform. The platform autoscales on Microsoft Azure by automatically detecting traffic spikes and scaling resources accordingly.

### *Cautions*

- **Modularity:** SAP’s platform is still on a path toward modularity, with only specific components decoupled into separate modules (search, product recommendations and Intelligent Selling Services). Companies seeking more extensively modular architectures should explore other platforms.
- **Lightweight B2C solution:** In 2022, SAP discontinued its Upscale Commerce platform, which was positioned for midmarket B2C companies. Although SAP has launched a Quick Start offering with a fixed scope and fixed cost for companies that want to go live quickly, Gartner clients generally report longer implementation times. Companies primarily looking for quick launches, especially for B2C, should therefore explore other options.
- **Pricing and contract negotiation:** Gartner clients report (through inquiries and Peer Insights reviews) difficulties with understanding SAP’s pricing and negotiation process. SAP therefore scores relatively low in this Magic Quadrant for ease of evaluation and contract negotiation.

## SCAYLE

SCAYLE is a Niche Player in this Magic Quadrant. SCAYLE has a single-tenant SaaS offering called SCAYLE Commerce Technology, with functionality for marketplace operations and order management. It is deployed on AWS infrastructure, uses containerization, and supports mainly B2C/direct to consumer (D2C) and marketplace (operations and integration) use cases. Most of SCAYLE's clients are in Europe, but its customer base in North America is growing. SCAYLE, which focuses on brands and retail customers, serves the fashion, home and living, sports, and beauty and personal care sectors. It has a broad range of customers, ranging from midsize to large enterprises (annual GMV of \$50 million to \$1 billion). Organizations desiring a SaaS solution that includes PIM, OMS, in-store capabilities, syndication and marketplace technology for multicountry rollouts should consider SCAYLE's. SCAYLE is owned by ABOUT YOU, which issued an initial public offering in May 2021.

### *Strengths*

- **Headless commerce:** SCAYLE's offering is fully headless and front-end-agnostic, which makes it well-suited to organizations that want to maintain their own storefronts and other interaction points.
- **Marketplace operations and integration:** SCAYLE offers native marketplace operation functionality. Its offering also includes a product syndication platform for integration with third-party marketplaces.
- **Unified retail commerce:** A native distributed order management (DOM) system, native in-store apps, and a basic native customer service and communications "suite" make SCAYLE's offering well-suited to offline-to-online use cases, though POS integration requires customization.

### *Cautions*

- **Industry focus:** SCAYLE focuses on sectors such as fashion, sports, home and living, and beauty and personal care, plus customers with a marketplace operations business model. Organizations that compete in other sectors or that do not require marketplace operations technology may want to look elsewhere.
- **Geographic reach:** The vast majority of SCAYLE's clients are in Europe, though the company also has a foothold in the U.S. and is expanding there. SCAYLE's offering is not currently available in other markets, and overall market awareness of SCAYLE remains low.
- **Partial solution:** SCAYLE has no CMS (but does have partnerships with headless CMS vendors), lacks advanced merchandising capabilities, and has only basic personalization and analytics capabilities out of the box. SCAYLE can suit customers looking for a composable approach to commerce, but those wanting a more sophisticated set of capabilities out of the box should look elsewhere or seek appropriate integrations.

## Shopify



Shopify is a Challenger in this Magic Quadrant. It has a broad product portfolio and different plans with different levels of complexity. Shopify Plus, the offering reviewed in this Magic Quadrant, is a multitenant SaaS platform aimed at midsize to large businesses, predominantly for B2C sales. Shopify has a global reach, but most of its customers are in North America. Shopify Plus has gained the attention of large merchants with simple selling requirements, for which time to market is a clear differentiator. Although the majority of Shopify's customers are relatively small, larger businesses should also evaluate Shopify Plus, especially when testing a new product line, entering a new geography or testing digital commerce as a business strategy. In July 2021, Shopify acquired Donde Fashion, a provider of a visual search application. In July 2022, Shopify acquired Deliverr, a fulfillment technology provider.

*Shopify did not respond to requests for supplementary information for this Magic Quadrant. Gartner's analysis is therefore based on other credible, public sources.*

### **Strengths**

- **Growth and expansion beyond core commerce:** Shopify's software revenue grew by 48% in 2021 (compared with 2020) and its market share growth was the fastest of the vendors in this Magic Quadrant. The Shopify Plus customer base grew to 14,000, a 40% increase (Shopify also has over 2 million merchants using other versions of its platform). To foster growth, Shopify surrounds its core commerce platform with a broad product portfolio, including Shopify Payments, Shopify POS, Shopify Shipping, Shopify Email, Shopify Markets, Shopify Fulfillment Network, Shopify Capital, Shop Pay Installments and Shopify Balance.
- **Support for complex use cases:** Shopify's newly launched Online Store 2.0 provides a notable upgrade for customization and business-user-friendly editing. Hydrogen, which was offered in developer preview form in November 2021 and officially launched in June 2022, is a front-end web development framework and SDK that provides more flexibility for merchants wanting to build custom Shopify storefronts. Shopify also offers Shopify Flow, a platform to automate tasks and processes within stores and across apps. These added capabilities improve Shopify's ability to meet the complex requirements of large businesses.
- **Ecosystem:** Shopify's growth is supported by a broad ecosystem that includes over 40,000 SI partners, 8,000 marketplace applications (a 30% rise in 2021, compared with 2020) and its Global ERP Program for ERP integrations.

### **Cautions**

- **B2B commerce:** Shopify enables merchants to set up wholesale channels, but its suitability for B2B digital commerce use cases remains untested. Merchants and other businesses looking for more complex B2B functionality should explore other vendors. Shopify launched a B2B offering in June 2022, which was not evaluated for this Magic Quadrant.
- **Multisite capabilities:** Additional costs and customizations are involved when setting up additional stores. Companies looking for more sophisticated customizable storefront management should consider other vendors.

- **Lack of large-enterprise customers:** Most of Shopify's merchants are very small businesses with subscription plans that cost less than \$50 a month. The Shopify Plus customer base accounts for less than 1% of Shopify's total merchants. Enterprise buyers with annual GMVs larger than \$50 million, especially in nonretail industries, should seek references from customers of similar size.

## **Shopware**

Shopware is a Niche Player in this Magic Quadrant. The latest version of its digital commerce platform, Shopware 6 Commerce Cloud, is based on the PHP Symfony framework. It is commercially licensed for on-premises and commerce cloud deployments, as either SaaS or PaaS (the latter launched in 2021). There is also an open-source community version. The B2B suite is part of the Enterprise Edition only. Shopware operates mostly in EMEA, with a focus on DACH countries (Germany, Austria, Switzerland), but is also expanding in Asia/Pacific. Shopware's target segments are small and midsize B2C retail and branded manufacturers and wholesale B2B companies.

## **Strengths**

- **Flow Builder:** Shopware provides a native no-code visual workflow builder that enables business users to customize prebuilt capabilities such as personalization, customer segmentation, promotions, loyalty point calculation and B2B workflows. This is a key differentiator for Shopware.
- **Multisite and new sales channel integrations:** Shopware enables customers to quickly launch new sales channels, including multiple storefronts, using prebuilt integrations. It also offers extensions for business users to enable sales on external channels such as Zettle, Facebook Ads, Google Shopping and Amazon Marketplace. Configurations provided for site properties are granular, and users have the flexibility to manage specific business rules for each capability and integration, which is a strong multisite feature.
- **Guided selling:** Shopware provides extensive guided-selling capabilities, which are specifically useful for B2B sales associates. Associates can set up a presentation mode and decide whether customers have full ability to browse and navigate through the product portfolio themselves or access a co-browsing mode. This enables sales teams to engage with customers on a live basis, either individually or as a group, using a parallel webchat component.

## **Cautions**

- **Vue.js storefront:** Shopware's progressive web app (PWA) storefront is built only on Vue.js, whereas other digital commerce vendors that offer a headless storefront also provide options on other widely used front-end frameworks, such as React and Angular. This could adversely affect Shopware clients, as they might need to acquire specific development resources to customize and maintain Shopware storefronts.

- **Geographic coverage:** Most of Shopware's employees, customers and SI partners are based in the DACH region. Shopware is, however, making investments to establish presence in North America and Asia/Pacific.
- **Midmarket focus:** The majority of Shopware's customers have less than \$50 million in annual GMV and focus on B2C selling. Only a small percentage of Shopware's customers are large enterprises with over \$250 million 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 Frontend Enablement Service [FES]), a hub for preintegrated applications (App Composition Platform [ACP]) and a marketplace operation application (Spryker Marketplace) as multitenant SaaS applications, at additional cost. Spryker has global operations and customers in all major regions. Spryker targets midsize and large organizations with annual GMV over \$100 million. Most of its customers are in the manufacturing, life sciences and retail sectors. Spryker supports B2B, B2C and marketplace business models. Organizations that need a modular commerce platform with extensibility should consider Spryker.

## **Strengths**

- **Architecture:** Spryker Cloud Commerce OS is built on a modular, cloud-native architecture that features over 40 independent modules. Each module can be made available in a PaaS environment for customization using Spryker's PaaS tools, thereby facilitating upgradability of the modules.
- **Extensibility:** Spryker offers several add-ons, such as FES, ACP and Spryker Marketplace, that enable customers to extend the front-end experience, core commerce capabilities and business models.
- **Growth:** Of the vendors in this Magic Quadrant, Spryker was among the fastest-growing in terms of customer and revenue growth in 2021. It has presence in all major regions and in more than 12 industries.

## **Cautions**

- **Out-of-the-box functionality:** Some of Spryker's native functionalities are not as strong as those of Leaders in this Magic Quadrant. For example, although several user roles are available out of the box in the administration console, control over role permissions is not as granular as that of the Leaders. Predefined workflows can be configured, but the process of creating new ones is less intuitive. Sophisticated catalog management, search capabilities and personalization require third-party extensions.
- **Business UI:** Although Spryker supports data ingestion and feature enrichment from integrated third-party applications, users have to be very familiar with those applications to locate the

needed functions, and sometimes need to “cut and paste” code to achieve the desired effect.

- **Geographic presence:** Although Spryker does have global SI partners, the majority are based in Europe. Customers in other regions may not find as many potential implementation partners.

## **Unilog**

Unilog is a Niche Player in this Magic Quadrant. Its digital commerce solution, CIMM2, is a single-tenant platform hosted on Google Cloud Platform. Unilog is undertaking a multiyear product development project for its new multitenant digital commerce product suite, CX1, which is progressing as individual CX1 products are completed and become generally available to customers. Unilog also offers content subscription, syndication and enrichment services at additional cost. Unilog’s customers are primarily small and midsize B2B organizations in the U.S. distribution, wholesale, retail and manufacturing sectors. Most of its customers have an annual GMV of less than \$10 million. Small and midsize B2B organizations that require both a digital commerce platform and strong product content functionality should consider Unilog.

### **Strengths**

- **Catalog management:** Unilog’s product content solutions have rich functionality to create catalogs and manage product content and associations. Unilog also has a visualized taxonomy to enable users to easily view the catalog structure and move items across nodes.
- **Content management:** Unilog’s natively integrated CMS has a page builder that can create and manage responsive pages for websites and mobile devices. Unilog also offers a mobile SDK (at additional cost) for building native apps.
- **Midmarket focus and bundling:** Unilog’s digital commerce platform is suitable primarily for midmarket B2B customers looking for a commerce platform with bundled PIM and CMS solutions.

### **Cautions**

- **Limited advanced functionality:** Unilog lacks some functionality that large-enterprise customers might expect to be included, such as self-service multisite setup, multiregion capabilities and workflows. Customers who need multiple sites have to ask Unilog to set them up on their behalf. Multiregion operation is not supported on a single-instance deployment of the platform. Approval workflows are available out of the box, but other capabilities, such as support RFQ, require third-party integrations.
- **Ecosystem:** Unilog has very few third-party integrations, except for ERP and payments. It relies on its own offerings to cover most commerce functionality.
- **Geographic presence:** Most of Unilog’s customers are based in the U.S., although some have global operations. Its service partners are also primarily in the U.S., so prospective customers outside the U.S. may have difficulty finding partners in their region.

## **VTEX**

VTEX is a Visionary in this Magic Quadrant. The VTEX Commerce Platform is a multitenant SaaS offering with more than 100 independent modules, including functionality for marketplace operations and order management. It is deployed on AWS infrastructure and supports both B2B and B2C use cases. Most of VTEX's operations and clients are in Latin America, but its customer bases in North America and EMEA are growing. VTEX has customers in multiple industries, the largest being retail. It serves many small organizations (those with annual GMV of less than \$50 million), but has increased its focus on, and traction with, larger enterprises. Organizations seeking a modular offering that includes marketplace operations and an OMS solution should consider VTEX, especially if they have a strong retail focus and operations mainly in Latin America. VTEX made three acquisitions in 2021: Suiteshare, a social selling platform provider (in June 2021); Workarea, a North American digital commerce platform provider (in February 2021); and Guava, a software development studio in Brazil (in August 2021). VTEX had an initial public offering in July 2021.

### **Strengths**

- **Comprehensive platform:** VTEX offers a suite solution for commerce that includes marketplace operations, OMS, search and personalization components, a headless CMS, and a low-code development platform (VTEX IO). All these components are included in the commerce platform license, with a few exceptions for small-customer offerings. This enables fast speed to market. VTEX received high scores from Peer Insights reviewers for integration and development.
- **Ecosystem:** VTEX has a large network of implementation partners, most of which are based in Latin America, although representation in North America is growing. VTEX also has a large ecosystem of technology partners, compared with other vendors in this Magic Quadrant. Notable areas in which it has technology partners include channel integrations, shipping and fulfillment, payment gateways and marketing automation.
- **Innovation:** VTEX has enhanced its administration functionality to manage multiple channels, launched a Live Shopping app and conversational commerce, and added new features and capabilities, such as a marketplace seller network and in-store selling of third-party products and fulfillment.

### **Cautions**

- **Focus on Latin America:** Ninety percent of VTEX's revenue, and a large majority of its employees, partners and customers are in Latin America. VTEX's geographic expansion has focused on growing its presence within Latin America outside Brazil, although it does continue to invest in the U.S. and Europe.
- **Multistore support and localization:** VTEX lacks a self-service business user interface for setting up new stores – a task that requires assistance from VTEX's support team. VTEX plans to address this on its roadmap, however. There are also limitations in terms of managing store-level catalogs, and many configurations have to be made at the product level.

- **Cloud options:** The VTEX Commerce Platform is available only on AWS infrastructure, which may deter organizations operating in non-Amazon cloud environments.

## 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

- Infosys Equinox
- Sana Commerce
- SCAYLE

### Dropped

- Intershop
- Oracle

## Inclusion and Exclusion Criteria

The inclusion criteria represent the specific attributes that Gartner analysts deemed it 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 2022:

- The vendor had to offer for sale at least one digital commerce platform that matched Gartner's digital commerce platform product description and requirements for digital commerce platform product functionality (for which, 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 year-over-year customer growth, revenue growth and total revenue for their digital commerce platforms.

*Scenario 1:*

- Net new digital commerce platform customers during 2021: More than five
- Annual recognized digital commerce software revenue in 2021: Equal to or greater than \$20 million
- Growth in annual recognized digital commerce software revenue from 2020 to 2021: Greater than 20%

*Scenario 2:*

- Net new customers in 2021: More than five
- Revenue in 2021: Equal to or greater than \$50 million
- Revenue growth from 2020 to 2021: Greater than 10%

*Scenario 3:*

- Net new customers in 2021: More than five
- Revenue in 2021: 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 out-of-the-box 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 year-over-year 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 140 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 or its products lack viability.

The following three vendors met several, but not all, of the inclusion criteria (each vendor failed to achieve the required combination of year-over-year customer growth and total license revenue for their 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. It is primarily used by 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 accelerator kit for companies that require a modern, decoupled storefront.
- **Microsoft:** Microsoft is relatively new to the digital commerce platform market. In 2020, it launched the Microsoft Dynamics 365 Commerce platform, which addresses B2C customer needs and is built on top of Microsoft Dynamics 365 Retail. In 2021, Microsoft added B2B capabilities. Microsoft Dynamics 365 Commerce includes native functionality for ratings and reviews, curbside pickups, loyalty accounts, intelligent product reviews, DOM and several other capabilities. It also includes a native CMS with DAM features at no additional cost.
- **Virto Commerce:** Virto offers a Microsoft .NET platform that can be deployed as a single-tenant hosted or multitenant SaaS platform — both options offer PaaS capabilities. It is aimed at midsize and large wholesalers and manufacturers. The platform is open-source, modular and API-first, and includes APIs for the business user administration console and storefronts. It comes with individual modules for digital catalog, pricing, cart, order, promotion, digital



experience and other capabilities. In 2021, Virto released Virto Marketplace, a marketplace operation application. Virto Marketplace is a stand-alone, platform-agnostic solution, but is natively connected to the Virto platform. In February 2022, Virto released a natively connected B2B storefront.

## 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.

**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 (August 2022)

### 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.

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

<b><i>Evaluation Criteria</i></b> ↓	<b><i>Weighting</i></b> ↓
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 2022)

## Quadrant Descriptions

## **Leaders**

Leaders demonstrate the ability to:

- Provide a depth and breadth of commerce functionality for B2C and B2B use cases.
- Deliver commerce capabilities across multiple industries and business models.
- Deliver commerce platforms that can scale up to support large transaction volumes and high levels of digital commerce GMV.
- Provide sales and support services both directly and through a robust ecosystem of application, service and integration partners.
- Deliver additional application functionality or partnerships with vendors that integrate with their core commerce platform.
- 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.
- Invest heavily in technology to meet the needs of their target customers.
- 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.
- Lack resources, compared with larger companies.
- Have smaller partner networks.
- 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.
- Offer more narrowly focused products, focusing either on B2C or B2B, but not both equally.
- 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**

Much as in previous years, 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. Double-digit revenue growth percentages were not uncommon for the vendors in this report, with more than half the vendors achieving year-over-year license revenue growth rates of more than 30%.

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 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 [Composable Commerce Must Be Adopted for the Future of Applications](#)).

Ultimately, however, every company's requirements are slightly different. We encourage clients to match their requirements for functionality, industry expertise, technology and cost to the right vendor, which may appear in any part of this Magic Quadrant, or even to the 100-plus vendors we track that do not appear in this research.

## Market Overview

The digital commerce market reached \$8.96 billion in software revenue in 2021, buoyed by record growth of 22% (up from 17.1% in 2020). This 22% growth is almost eight percentage points higher than the 14% growth of the overall enterprise application software market. Despite the restarting of many physical and offline activities, which moderated digital commerce growth in the second half of 2021, digital commerce growth for 2021 as a whole was still higher than in 2019. Gartner expects the strong growth of the digital commerce market to moderate in 2022, at 15.3% in U.S. dollars or 18% in constant currency.

The CX and CRM sector, of which digital commerce is part, is forecast by Gartner to achieve a compound annual growth rate (CAGR) of 14.3% in constant currency for the period 2021 through 2026 (see [Forecast: Enterprise Application Software, Worldwide, 2020-2026, 2Q22 Update](#)). Gartner forecasts a CAGR of 16% in constant currency for digital commerce revenue over the same period.

Inquiries from Gartner clients about digital commerce strategies, trends, platforms and ecosystem applications have been consistently high for several years, and this trend has continued into 2022. Growth in B2B digital commerce continues to outpace growth in B2C digital commerce as clients think about solutions that are not used solely for simple transactions but also for complex B2B sales that sometimes involve other systems (such as CPQ and sales force automation systems). 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 seek the assistance of SIs, or to attempt to integrate applications themselves. The pandemic has prompted many organizations to embark on digital business quickly and with less investment upfront. According to the Gartner State of the Union for Digital

Commerce Survey, adoption of digital commerce SaaS increased from 17% in 2019 to 40% in 2021.

## 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
DXP	digital experience platform
FEaaS	front end as a service
GMV	gross merchandise value
MACH	microservices, API-first, cloud-native, headless

MXDP	multiexperience development platform
NLP	natural language processing
OMS	order management system
PaaS	platform as a service
PBC	packaged business capability
PIM	product information management
POS	point of sale
PWA	progressive web app
RFQ	request for quotation
SaaS	software as a service
SI	system integrator

## 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 23 April 2021 to 11 April 2022.
- Other sources:
  - [Forecast: Enterprise Application Software, Worldwide, 2020-2026, 2Q22 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 2021 and the first five months of 2022.
  - 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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