

The Forrester Wave™: B2B Commerce Suites, Q2 2020

The 13 Providers That Matter Most And How They Stack Up

by Joe Cicman and Emily Pfeiffer

May 19, 2020

Why Read This Report

In our 29-criterion evaluation of B2B commerce suites providers, we identified the 13 most significant ones — Adobe, Apttus, BigCommerce, commercetools, Elastic Path Software, Episerver, Insite, Intershop Communications, Oracle, Salesforce, Sana Commerce, SAP, and Unilog Content Solutions — and researched, analyzed, and scored them. This report shows how each provider measures up and helps digital business professionals select the right one for their needs.

Key Takeaways

Adobe And Salesforce Lead The Pack

Forrester's research uncovered a market in which Adobe and Salesforce are Leaders; commercetools, Oracle, Intershop Communications, Insite, BigCommerce, SAP, and Sana Commerce are Strong Performers; and Apttus, Elastic Path Software, Unilog Content Solutions, and Episerver are Contenders.

Integration Capability And Business User Experience Are Key Differentiators

As monolithic technology becomes outdated and less effective, the providers that lead the pack demonstrate deep, prebuilt integrations and strong business user tooling. Vendors that deliver this value position themselves to successfully help their clients grow revenue, deepen customer loyalty, and expand into new markets.

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Related Research Documents

[Now Tech: B2B Commerce Suites, Q1 2020](#)

[Redefining The Three Commerce Technology Models For Today's Business Requirements](#)

[The Top Strategies For Replatforming Your Commerce Solution](#)



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B2B Businesses Seek Simplicity, Unity, Efficiency, And Choice

Digital commerce has seen considerable changes over the past few years. As headless vendors have gained more mainstream adoption, B2B businesses have sought solutions that do more to manage a rapidly evolving market. Legacy solutions have worked toward keeping pace by becoming more open, more deeply integrated, and less monolithic.

The 2018 Forrester Wave™ for this category called out the investments that vendors were making to improve upgrade cycles and move to cloud. Vendors have also made widespread acquisitions to build out complete suites. They are now making the next evolutionary strides as they open their platforms to tight integration of other functions of a commerce suite — even to solutions from competitive vendors. Some B2B businesses still value the ability to find all functions under one banner. However, more are opting to assemble a suite of best-fit solutions tailored to their needs, regardless of vendor, enabling these B2B businesses to seek out exactly what they need to efficiently manage their digital businesses.

As a result, B2B commerce suite customers (B2B businesses) should look for commerce solution providers that:

- › **Offer prebuilt, deep integrations.** More providers today offer proprietary app stores. However, the actual implementation of these add-ons can require everything from a few plug-and-play configuration clicks to a major developer-dependent implementation project. Look for ease of integration, meaning that: 1) the integrated solution is administrable within common tooling, and 2) changes are applied in real time and do not require batch processing or manual refreshes to take effect.
- › **Provide relevant, industry-leading options — first- and third-party.** B2B businesses expect to choose the best-fit solution for their vertical industry-specific needs in every critical function of a commerce suite, such as order management system (OMS), digital asset management (DAM), and product information management (PIM), as well as the adjacent functions (like personalization and specialized pricing tools). They don't want to be limited to — or forced to customize — a provider's first-party offering or the third-party options with which their provider has partnered. B2B businesses will combine solutions from varied, competing providers — a trend that will accelerate as more B2B businesses transition toward microservice architecture.
- › **Have built or moved to a cloud, SaaS, and microservice-based offering.** It is no surprise that reference customers told us they are dissatisfied with resource-heavy upgrades. Frequent, painless upgrades via software-as-a-service (SaaS) are a meaningful differentiator in this space. Continuous deployment models have become more widespread, and some providers offer truly versionless platforms. The once-common quarterly (or even yearly) major upgrades cannot keep up with rapidly evolving B2B business and end customer expectations and needs. In addition, customers should look for the ability to deploy portions of a platform without deploying an entire monolithic suite, as well as other signs of modern delivery models, including zero-downtime upgrades and websites that automatically scale during high demand.

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- › **Prioritize the business user experience.** Business leaders tell us that they're relying on technology to improve their efficiency. Vendors are responding by simplifying workflows for business users and administrators. The best vendors continually improve users' experience without major upgrades or disruption to muscle memory of learned processes. Some features have become commoditized, such as personalized catalogs, for which most providers offer strong functionality. Now B2B businesses will look for the game-changing providers that amplify their deep integrations and join administration of first- and third-party tools — all within a single, unified experience for ultimate efficiency.

Evaluation Summary

The Forrester Wave evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape. You'll find more information about this market in our reports, "[Now Tech: B2C Commerce Suites, Q1 2020](#)" and "[Now Tech: B2B Commerce Suites, Q1 2020](#)."

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

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FIGURE 1 Forrester Wave™: B2B Commerce Suites, Q2 2020

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B2B Commerce Suites
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FIGURE 2 Forrester Wave™: B2B Commerce Suites Scorecard, Q2 2020

	Forrester's weighting	Adobe	Apttus	BigCommerce	commercetools	Elastic Path Software	Episerver	Insite
Current offering	50%	3.74	2.91	2.35	2.92	1.68	2.27	3.20
Sales channel support	10%	3.50	2.50	1.50	3.00	2.50	1.50	3.50
Personalization	10%	5.00	1.00	3.60	3.00	1.00	3.00	3.00
Business intelligence and analytics	5%	3.00	1.00	3.00	1.00	1.00	3.00	5.00
AI and machine learning	5%	3.00	3.00	1.00	3.00	1.00	5.00	1.00
Commerce suite	15%	4.50	2.00	2.50	3.00	1.50	2.50	3.50
Commerce management	30%	3.30	4.10	1.70	2.90	2.10	1.40	3.00
Platform	25%	3.70	3.30	3.00	3.20	1.50	2.50	3.30
Strategy	50%	4.20	2.00	3.84	3.96	2.16	1.40	3.04
Product vision and roadmap	30%	5.00	1.00	3.00	5.00	3.00	1.00	3.00
Delivery model	30%	3.00	3.00	5.00	5.00	1.00	1.00	3.00
Supporting services	20%	4.00	1.00	3.00	3.00	3.00	1.00	4.00
Delivery and extensibility ecosystem	20%	5.00	3.00	4.20	1.80	1.80	3.00	2.20
Market presence	0%	4.50	2.25	1.00	1.00	2.75	1.25	2.00
Customers and customer acquisition	50%	4.00	3.00	1.00	1.00	3.00	1.00	2.00
Total gross merchandise value (GMV)	25%	5.00	2.00	1.00	1.00	3.00	1.00	2.00
Product revenue	25%	5.00	1.00	1.00	1.00	2.00	2.00	2.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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FIGURE 2 Forrester Wave™: B2B Commerce Suites Scorecard, Q2 2020 (Cont.)

	Forrester's weighting	Intershop Communications	Oracle	Salesforce	Sana Commerce	SAP	Unilog Content Solutions
Current offering	50%	3.56	3.70	4.25	2.79	3.58	2.11
Sales channel support	10%	4.50	3.00	4.50	3.00	3.00	1.50
Personalization	10%	3.00	4.40	4.40	1.60	4.40	1.00
Business intelligence and analytics	5%	3.00	3.00	5.00	3.00	3.00	1.00
AI and machine learning	5%	3.00	3.00	5.00	3.00	3.00	1.00
Commerce suite	15%	3.50	3.00	3.00	2.50	4.50	2.50
Commerce management	30%	3.70	4.60	4.70	3.00	3.30	2.10
Platform	25%	3.50	3.30	4.00	3.00	3.50	3.00
Strategy	50%	2.76	3.00	3.60	3.20	2.56	1.72
Product vision and roadmap	30%	3.00	3.00	3.00	3.00	3.00	1.00
Delivery model	30%	3.00	3.00	3.00	3.00	1.00	3.00
Supporting services	20%	3.00	3.00	4.00	4.00	3.00	2.00
Delivery and extensibility ecosystem	20%	1.80	3.00	5.00	3.00	3.80	0.60
Market presence	0%	2.25	1.50	2.75	1.75	5.00	1.00
Customers and customer acquisition	50%	2.00	1.00	3.00	2.00	5.00	1.00
Total gross merchandise value (GMV)	25%	4.00	1.00	3.00	2.00	5.00	1.00
Product revenue	25%	1.00	3.00	2.00	1.00	5.00	1.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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Vendor Offerings

Forrester included 13 vendors in this assessment: Adobe, Apttus, BigCommerce, commercetools, Elastic Path Software, Episerver, Insite, Intershop Communications, Oracle, Salesforce, Sana Commerce, SAP, and Unilog Content Solutions (see Figure 3).

FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
Adobe	Magento Commerce, Magento Order Management, Magento Business Intelligence, Adobe Analytics, Adobe Target	2.3.4
Apttus	Apttus E-Commerce	Winter '19
BigCommerce	BigCommerce Platform	N/A
commercetools	Commercetools B2B Platform	N/A
Elastic Path Software	Elastic Path Commerce Cloud	7.6
Episerver	Episerver Commerce Cloud	N/A
Insite	Insite Commerce	4.5.2
Intershop Communications	Intershop Commerce Management (ICM), Intershop Order Management (IOM)	7.10, 2.9
Oracle	Oracle CX Commerce	19.5.8
Salesforce	Salesforce B2B Commerce	N/A
Sana Commerce	Sana Commerce	9.3.5
SAP	SAP Commerce Cloud	1905
Unilog Content Solutions	Unilog CIMM2	8.2

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Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

- › **Adobe leads with flexibility, supported by a global partner ecosystem.** San Jose, California-based Adobe offers Magento Commerce as both on-premises and single-tenant hosted solutions. The latter, released in late 2017, scales and provides guardrails that simplify upgradability — demonstrating a successful cloud migration of the solution. Magento Commerce has an above-par, large, loyal, and highly capable delivery ecosystem that Adobe engineering is harnessing to increase its development velocity. The PWA Studio is positioned to lower the cost and complexity of adopting Progressive Web App experiences. Adobe's go-to-market (GTM) is focused on selling both to Adobe's enterprise client base and the midmarket that is Magento's heritage. Adobe is well positioned for broad reach with the combined forces of its sales teams and partner ecosystem.

Adobe delivers above-par functionality in mobile and A/B and multivariate testing and is on par with other vendors in sales and service rep support. Adobe's strong set of implementation partners — both agencies and SIs — gives it the ability to deliver innovative experiences for subindustry niches despite a broad product approach. Customers told us they liked the ability to customize but would welcome improvements in upgrades and prebuilt integration connectors. Adobe is best for brand-centric companies with rapidly evolving business models that differentiate on experience.

- › **Salesforce offers a self-service extension to its CRM with ecosystem innovation.** San Francisco-based Salesforce is a powerhouse for end-to-end customer engagement solutions centered around its CRM. In the past four years, it acquired separate B2B (Cloud Craze) and B2C (Demandware) commerce platforms. Both solutions now are part of the Salesforce Commerce Cloud but remain two distinct products. Salesforce is above par in its approach to the market, setting strategies that speak to customer needs and delivering (as promised) with reliable technical and support resources. Salesforce offers its clients an unparalleled ecosystem of apps and advocates ("Trailblazers") for innovating omnichannel experiences with low-code agility.

Salesforce B2B Commerce delivers above-par functionality in business intelligence, personalization, and product configuration, and it is on par with other vendors for promotions and order management. Salesforce made big strides in search through its AppExchange partnership with Coveo. It seamlessly integrates these leading third-party capabilities into the business user tooling. Customers told us they like working with Salesforce as a vendor, but as one reference noted, "If I could change one thing, I would increase the [storefront] speed." Salesforce B2B Commerce is best for manufacturing and wholesale companies that have already invested in Salesforce CRM as the core of their sales tooling.

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Strong Performers

- › **Commercetools is new-school commerce tech, but only for the digitally mature.** In Q4 2019, Berlin-based commercetools was spun out from its parent, REWE, and acquired by Insight Partners in a move to boost growth for this truly cloud-native vendor. It offers cloud-native eCommerce APIs for large enterprises as an alternative to a custom build. First launched in 2013, commercetools was built from the ground up to provide developer-friendly APIs backed by cloud-native microservices in a multitenant architecture. This setup gives it the distinct advantage of being versionless and highly elastic at unprecedented cost-efficiency. Its product strategy and roadmap are above par compared with others in this evaluation. It gives its customers a commerce platform for building visionary commerce experiences at a fraction of the cost and time it would take to build in-house.

Commercetools delivers above-par platform architecture and promotions but is below par in business intelligence and workflow. This solution intentionally avoids investment in areas like workflow, instead deferring to a client's enterprise business process management system. This means commercetools isn't right for clients who need an all-in-one packaged offering. Customers told us they like not having scaling restrictions and not being on an upgrade cycle, but they would welcome improvements in the availability of out-of-the-box integrations. commercetools is best for digitally advanced companies with an API-first approach to digital and a strong, modern, agile developer culture.

- › **Oracle marries commerce to experience but doesn't significantly differentiate.** In recent years, Redwood Shores, California-based Oracle has shifted its focus away from accumulating acquisitions that rounded out its owned commerce offerings and toward more deeply incorporating commerce into its broader customer experience (CX) suite. Oracle CX Commerce is positioned as a strategic onramp to cloud commerce for enterprise customers, though current adoption is still mainly among midmarket organizations. It has on-par delivery model upgrades on the roadmap that will bolster the stability of its cloud offering, and customers cite improvements in this area. Its Sales, Marketing, and Configure, Price, Quote (CPQ) clouds provide for a full-spectrum solution set that is on par with offerings from other major vendors.

With the development of Oracle CX Commerce, the company has rearchitected its commerce offering from the ground up. Oracle delivers above-par product and service configuration and workflow and is on par in mobile. Oracle's CX Cloud is integrated with its other ERP and financial clouds, bringing a self-service buying experience to the end-to-end customer lifecycle. The platform is still young and is gaining adoption and reference customers. Customers told us they appreciate that the solution does what they need it to do but would welcome improvements in business user tooling and out-of-the-box integrations, as well as less reliance on developers. Oracle Commerce Cloud is best for companies that are already using other solutions from Oracle to serve long-term customer relationships and for those companies that want a cloud-first provider with an all-in-one approach to commerce.

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- › **Intershop Communications has a proven feature set, but its move to cloud is slow.** Germany-based Intershop targets multinational manufacturing and wholesale enterprises across a variety of industries. It offers an all-in-one commerce platform in a single-tenant-hosted SaaS on Microsoft Azure. It has battle-tested capabilities developed over decades but is now under pressure on several fronts to modernize for cloud, which will be challenging. As such, Intershop's roadmap is composed primarily of working through a backlog. For example, the company is simultaneously adopting Azure services like PowerBI, artificial-intelligence/machine-learning (AI/ML), and DevOps and is adding new eCommerce functionality. Longtime customers will face the daunting challenge of an upgrade to SaaS that feels like a replatform. Understandably, above-par innovation will take a back seat for a year or two.

Intershop delivers above-par sales and service rep support and order management and is on par with other vendors for CMS and mobile. Its feature set is focused on long-term omnichannel customer engagement around complex capital equipment that requires aftermarket service, support, and consumables. Reference customers told us they're happy with Intershop's reliability and roadmap execution but expressed concerns about the infrastructure flexibility. Intershop is best for manufacturing companies that offer customer portals for aftermarket sales and service for heavy industrial equipment.

- › **Insite provides an all-in-one solution for midmarket but needs ecosystem innovation.** In late 2019, Episerver acquired Minneapolis-based Insite to shore up its B2B story while using Episerver's global reach to break into new markets. Insite offers an all-in-one SaaS platform to midsize distributors and manufacturers. It offers single-tenant SaaS with a feature set that is laser focused on driving business value through digitizing its clients' sales motions. Its product vision and roadmap are on par with others in this evaluation. Insite aligns with industry groups like Affiliated Distributors to offer their members pragmatic guidance on using eCommerce to digitally transform customer engagement.

Insite delivers above-par business intelligence but is below par in AI/ML. Its customer success program is fine-tuned to the needs of its core market, with analytics that demonstrate the impact when clients adopt new features. Customers told us they are thrilled with the deep partnership they have with Insite but would welcome improvements in AI/ML and personalization at scale — which new parent Episerver brings to the table. Insite is best for midmarket distributors and manufacturers that are digitally transforming their sales motions.

- › **BigCommerce supports various growth stages but misses industry vertical needs.** Austin, Texas-based BigCommerce provides a cloud-native, multitenant SaaS with a curated app store and full API coverage. The company targets growth-minded brands that differentiate on customer experience. BigCommerce made a smart play in creating a business user interface that is simple to use and extend while also being flexible. Its product vision and roadmap are above par compared with others in this evaluation. Furthermore, its curated app store provides beginner, intermediate, and advanced capabilities that clients can swap out as their needs evolve over time.

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BigCommerce delivers above-par A/B testing and platform integration but is below par in order and price management. Its core technology and ISV partnerships are powerful, but its generalist approach means that agencies need to provide industry-specific expertise to support digital transformations. Customers told us they like the culture and responsiveness of the support experience but would welcome improvements in inventory and promotions. BigCommerce is best for B2B businesses experimenting with new markets or sub-brands, or simplifying their tech portfolio, moving away from legacy platforms.

- › **SAP innovates around core eCommerce, but upgrades are behind the times.** Germany-based SAP released its Commerce Cloud on Public Cloud (Azure) in June 2018 with enhanced DevOps tooling to simplify technical implementation. It has surrounded the core with a new CMS, a serverless and microservices extension service, a personalization engine, and a chatbot. In the midst of a multiyear modernization of its Hybris asset, SAP is making incremental strides by building around that core to integrate with the broader SAP Customer Experience suite. SAP is building out this suite to offer a portfolio of engagement technologies to its large enterprise ERP clients across multiple verticals. Overall, SAP's product vision and roadmap are on par compared with others in this evaluation. SAP needs to continue to make strategic investments in its underlying platform architecture so that clients can easily stay on current versions and consume new innovation.

SAP delivers above-par PIM, DAM, and OMS capabilities and is on par in platform integration. The components of SAP Commerce Cloud are integrated with one another, but its third-party integration capability is not as built out as other solutions in this evaluation. This means SAP is good for companies that want an all-in-one solution but not for companies building best-of-breed solutions. Customers told us they credit SAP with improved client relationships but would welcome deeper integration with other SAP Customer Experience components. SAP Commerce Cloud is a best fit for companies that have already bought into SAP S/4HANA and SAP Customer Experience solutions.

- › **Sana Commerce extends ERP for omnichannel but neglects customer acquisition.** Rotterdam, Netherlands-based Sana Commerce offers an all-in-one solution that extends SAP and Microsoft Dynamics ERPs for midmarket manufacturers. Sana's approach to simplification keeps the management of customers, prices, and orders in the ERP. Its out-of-the-box real-time integrations avoid additional cost during implementation and upgrades. Sana's product vision and roadmap are on par with others in this evaluation. Sana Commerce targets midmarket manufacturers that use SAP or Dynamics and are either new to eCommerce or struggling with heavyweight commerce platforms.

Sana Commerce delivers above-par customer success programs but is below par in CMS. It intentionally avoids building out many of the features present in other platforms and instead invests in tight integration with specific ERP packages. Customers told us that Sana's offering is

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priced well for the value it delivers but that they would welcome improvements in the CMS. Sana Commerce is best for midmarket manufacturing or wholesale companies that run SAP or Microsoft Dynamics ERPs.

Contenders

- › **Apttus' eCommerce is most valuable as an extension of its middle-office solution.** In late 2018, Thoma Bravo acquired a controlling position in San Mateo, California-based Apttus, setting out to transition the company from its aggressive growth stage to a professionalized provider of mission-critical omnichannel selling tools. The company's strategy is to provide tools — including quote-to-cash (QTC), contract lifecycle management, and other middle-office solutions — to transform its clients' sales motions and extend their CRM investments. The company's roadmap is — and for now must be — focused on fixing product performance, maturing its quality, and closing technical debt to make good on promises to clients. Apttus built its offering on cloud-native Force.com and uses business objects from the client's SFDC (and soon Microsoft Dynamics) account. It recently embarked on a partnership with Microsoft Azure to offer performance enhancements to clients that stretch the limits of Force.com. After we concluded this evaluation, Apttus announced its intent to buy Conga and take its name.

The Apttus suite is composed of components that clients can implement one at a time. Its eCommerce component offers a self-service channel that makes sense to adopt after other components like QTC. Apttus is above par in configuration and pricing capabilities but is below par in personalization and site search. Its strengths support aftermarket selling to existing customers, rather than customer acquisition. Customers told us they appreciate the tight integration with their SFDC instance but would welcome improvements in system performance and roadmap delivery. Apttus is a best fit for companies that already run SFDC, sell complex products on contract, and need a tightly integrated self-service selling channel to complement their omnichannel selling.

- › **Elastic Path Software tackles complex scenarios with hefty developer effort.** Vancouver-based Elastic Path was one of the early proponents of headless commerce. Cortex, its hypermedia REST API, gives developers the flexibility to build out just about any commerce experience, without limiting options for complementary partner solutions. To accelerate its move to microservices architecture, Elastic Path acquired Moltin in Q4 2019 — the success of which relies on a plan for its as-yet largely on-premises clients to easily adopt Moltin's capabilities. With great execution, the moves Elastic Path is making now will position it strongly for the future. Its product strategy and vision are on par with others in this evaluation. A reboot of its business user tooling will further help Elastic Path catch up to industry expectations.

Elastic Path is on par with other vendors for price, account, and order management functionality but is below par in promotions and product configuration. Compared with other vendors in this evaluation, Elastic Path lacks modern, intuitive business user tooling and workflows. While the design of the business user tooling is familiar to coders, it's foreign to merchandisers and marketers who need to work with agility to respond to shifts in market tastes. This is especially

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relevant for promotions. Customers with a strong developer culture told us they like the customization framework but would welcome improvements in B2B-specific functionality and partnerships. Elastic Path is best for B2B businesses with specialized business models that have a strong development culture to build differentiated commerce experiences.

- › **Unilog blends deep PIM with searchable content but is less extensible than others.** Wayne, Pennsylvania-based Unilog Content Solutions began as a product content enrichment service, then offered bespoke eCommerce solutions, and then grew into an API-first SaaS product company. Its in-market offering is CIMM2. Overall, Unilog's strategy focuses on helping distribution companies offer a self-service eCommerce channel to augment their existing sales motions. It offers below-par public extensibility, mainly because its business model is different: It does customizations in-house versus relying on third-party partners. This enables Unilog to be both affordable and grow its feature set with its customer base. Unilog's product vision and roadmap are below par compared with others in this evaluation.

Unilog delivers above-par PIM capabilities but is below par in DAM and OMS. It offers product content enrichment services that rationalize taxonomies and normalize values (like "in." to "inches"). This enriched content leads to better onsite search results and better SEO — both of which attract and convert more traffic and lead to higher sales. Customers told us they like the ease of implementing the mobile experience but would welcome improvements in managing digital assets. Unilog is a best fit for cost-conscious distributors transitioning from traditional offline to self-service eCommerce sales for the first time.

- › **Episerver pairs commerce and content well but must improve client communication.** Nashua, New Hampshire- and Stockholm-based Episerver began with strong CMS roots and a Microsoft .NET framework and has since successfully added commerce to its core functionality. It has solidified itself in the market as a commerce vendor with a strong focus on digital experience. With its recent acquisition of Insite Commerce, Episerver's current strategy is heavily B2B focused. The company demonstrates customer centricity efforts through its app marketplace and as evidenced by its positive growth trajectory. This evaluation is based on Episerver's B2B eCommerce offering, not on Episerver as the new parent of Insite. Episerver's B2B eCommerce product vision and strategy is below par compared with others in this evaluation. Its retail focus is still a young, albeit growing, portion of its business.

Episerver delivers above-par CMS but is below par in order and price management. Its focus on brand experience capabilities makes it ideal for branded manufacturers selling both direct to consumer (B2C) and wholesale to retail partners (B2B2C). Customers told us they liked the ease and power of the personalization and A/B testing but would welcome improvements in search. Episerver is a best fit for brand-centric companies without a development culture selling SKUs across multiple web properties.

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Evaluation Overview

We evaluated vendors against 29 criteria, which we grouped into three high-level categories:

- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's customers and customer acquisition, total gross merchandise value, and product revenue.

Vendor Inclusion Criteria

Forrester included 13 vendors in the assessment: Adobe, Apttus, BigCommerce, commercetools, Elastic Path Software, Episerver, Insite, Intershop Communications, Oracle, Salesforce, Sana Commerce, SAP, and Unilog Content Solutions. Each of these vendors has:

- › **A strong focus on B2B commerce.** These vendors have all critical components of a B2B commerce suite, with solutions for PIM, DAM, CMS, OMS, CPQ, and personalization included natively, through their app store, or via preintegrated partnerships.
- › **Substantial B2B product revenue.** Each vendor has at least \$20 million in B2B product revenue.
- › **A broad customer base.** The vendors have an existing customer base of enterprise global clients and a focus on more than one region, with current evidence of mindshare and adoption among Forrester clients.

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Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

The Forrester Wave™: B2B Commerce Suites, Q2 2020

The 13 Providers That Matter Most And How They Stack Up

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by January 2020 and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

We work with business and technology leaders to drive customer-obsessed vision, strategy, and execution that accelerate growth.

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