IDC MarketScape

# IDC MarketScape: Worldwide Multi-Enterprise Supply Chain Commerce Network 2025 Vendor Assessment

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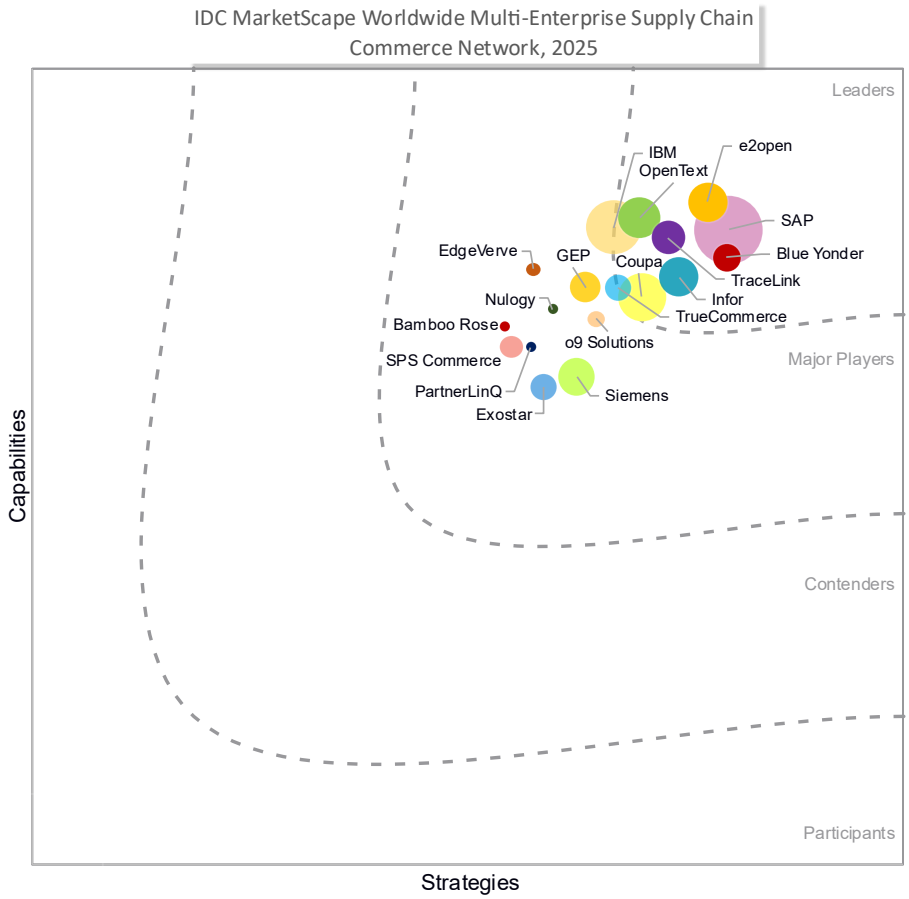
## THIS IDC EXCERPT FEATURES COUPA AS A LEADER

## IDC MARKETSCAPE FIGURE

### FIGURE 1

**IDC MarketScape Worldwide Multi-Enterprise Supply Chain Commerce Network Vendor Assessment**




Source: IDC, 2025

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

## ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Multi-Enterprise Supply Chain Commerce Network 2025 Vendor Assessment (Doc # US53010225).

## IDC OPINION

This IDC study represents the vendor assessment model called IDC MarketScape. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's success in the multi-enterprise supply chain commerce network (MESCCN) space and helps assess current and anticipated performance in the marketplace. This 2025 vendor assessment is a refresh of the one published in late 2023 (see *IDC MarketScape: Worldwide Multi-Enterprise Supply Chain Commerce Network 2023 Vendor Assessment,* IDC #US49948423, December 2023).

As IDC has noted within our supply chain research, the long-term movement of the supply chain to one that is highly outsourced and distributed has created both opportunity and challenge. No longer is the supply chain a self-contained function; rather, it is connected and integrated with partners both upstream to supply and downstream to fulfillment. It is frequently noted that 80% of the issues facing any supply chain occur beyond its four walls, indeed beyond direct control. Whether it is 80% or higher or lower, it is immaterial: The point is that more problems occur outside than inside for most supply chains. This means that companies need better tools to enable modern collaboration and visibility. While disruption may be difficult to predict or anticipate, having earlier upstream/n tier supply signals of impeding problems is critical to respond faster and foster resiliency.

Consistently, across many years of IDC's *Supply Chain Survey,* companies cite both collaboration and visibility challenges. While the multi-enterprise network is not a magic balm for these issues, it is a modern way to address both in a comprehensive way and an opportunity to drive better overall supply chain performance.

The multi-enterprise supply chain commerce networks are one of these opportunities, and this study assesses the capability and business strategy of 18 vendors with broad competencies in supply chain commerce networks. This evaluation is based on a comprehensive framework and a set of parameters expected to be conducive to success in providing organizations with insight into supply chain commerce network tools. Key findings include:

- IDC Manufacturing Insights defines a multi-enterprise supply chain commerce network as any platform that facilitates both the exchange of information and enables transactions among disparate parties pertaining to the supply chain or to supply chain processes. In today's fast-paced, highly analytical supply chain, the use of networks to facilitate commerce and collaboration can mean the difference between meeting supply chain performance goals and not meeting goals.
- As supply chain networks grow in importance as the "center" of the supply chain operational space, and a key component of overall end-to-end orchestration, so do the connections with both traditional and emerging supply chain management (SCM) applications. Although those SCM applications are not part of this evaluation, the ability to easily and seamlessly integrate with them remains an important consideration.
- Each vendor included in this IDC MarketScape offers and has displayed demonstrable competency in the field of multi-enterprise supply chain commerce networks.
- There are many variations of the multi-enterprise supply chain commerce network, with different design goals and aspirations. The included vendors also have different heritages. Some come from the procurement/sourcing space, others from electronic data interchange (EDI)/B2B, and still others are cloud native. Some are focused on a narrower set of industries, others are broader. Consequently, although the vendors in this study address similar market needs, they can also complement each other under certain circumstances.
- The criteria used in this IDC MarketScape (and the resulting position in Figure 1) are across dual dimensions of strategy (future plans and where the vendor is headed) and capability (where the vendor is today in terms of capabilities). Each of the elements within strategy and capability is then assigned a weighting based on the relative importance of each criterion in the opinion of IDC Manufacturing Insights and feedback from client references.
- This IDC MarketScape is a starting point for manufacturers that are either considering adopting or furthering their participation in a multi-enterprise supply chain commerce network. The vendors included represent a "short list" — a way to winnow down the long list of service providers, both big and small, in the marketplace. Of course, this document does not replace the due diligence that companies must then do to evaluate which vendor is the right fit for their specific needs and circumstances.

The view of IDC remains that multi-enterprise supply chain commerce networks are the future of visibility and collaboration for the modern supply chain. Traditional approaches to both have proven to be limited, and "doing the same thing time after time and expecting a different result" is the definition of "madness." As supply chains

look for ways to be more agile by seeing disruptions further back (earlier) in their supply base and are facing increasingly demanding sustainability requirements (Scope 3 particularly), the multi-enterprise supply chain commerce network becomes a "must-have" rather than just a "nice-to-have."

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

It is the opinion of IDC that multi-enterprise supply chain commerce networks are a critical element of both the current and future supply chain. Any company that runs a supply chain, whether manufacturer, retailer, or wholesaler, can benefit from the capabilities that a competent network provides. As ecosystems become a more important part of and a contributor to shared knowledge and integrated operations, the multi-enterprise networks that form the operational underpinnings of those ecosystems also grow in importance.

A multi-enterprise supply chain commerce network can be a single platform, or it can be a platform integrated to various supply chain applications. While the evaluation here is of the commerce platform itself as it pertains to the supply chain, the ability to integrate with, or be integrated with, supply chain applications spanning both planning and execution/fulfillment is the way of the future for these networks. Although we did not distinguish networks in our analysis solely by size, clearly, the value of any network is a function of the number of participants on the platform, so the ability to seamlessly scale is important.

There are an increasing number of vendors offering multi-enterprise supply chain commerce networks to the market. The intent with this IDC MarketScape is to focus on those notable vendors that focus on broad supply chain capabilities, with the following criteria to guide inclusion:

- Vendors must have a global presence, with engagements in at least two major geographic regions.
- Vendors must have industry breadth with engagements in at least two industries (manufacturing, retail, life sciences, wholesale, etc.).
- Vendors must have been offering multi-enterprise supply chain commerce tools for at least three years.
- Vendors must have at least 20 referenceable client engagements across the industries they support.

Each of the 18 vendors included in this document meets these requirements. However, there are vendors that run networks that focus on a particular functional area within the supply chain or those vendors that manage a particular enterprise task or even some vendors supporting a specific industry.

## ADVICE FOR TECHNOLOGY BUYERS

Disruption has become an unwelcome house guest for the supply chain, whether the global COVID-19 pandemic, chronic inflation, logistics issues, or tariffs/trade deals, accelerating companies' desire to be more resilient, with IDC's *2025 Supply Chain Survey* suggesting that improved visibility and increased sourcing diversity are high on the list of strategies to accomplish that goal. On the heels of every major disruption, talk of nearshoring resurfaces. Usually, it is more noise than reality, so whether we see, for example, the movement of manufacturing locations as a consequence of shifting trade deals, or just final assembly, remains to be seen, but there is no question that the networks that enable collaboration, visibility, and seamless trade are an important tool in navigating quickly shifting market dynamics.

The outsourcing opportunity — of course, well known and long established — has been to allocate activities to external parties for whom the said activity is a core competency or involves labor arbitrage. While we might argue that the latter is less "plentiful" than in the past, with freight and transportation "footprints" a greater area of concern given energy costs and sustainability goals, the focus on outsourcing partners with core competencies in key areas of the supply chain remains an important component of the supply chain today and will continue to be so in the future. The challenge of an outsourced supply chain is that the ability to collaborate/communicate in real time and have acceptable levels of visibility both upstream and downstream has become increasingly challenging.

For manufacturers, retailers, or wholesalers looking to participate in multi-enterprise supply chain commerce networks — either for the first time or as a complement to existing network participation — IDC offers the following guidance:

- **Take your time in evaluating vendors.** The decision to engage should be backed up with due diligence to ensure that the vendor selected has the appropriate levels of experience in your area of need.
- **Be clear about the need.** Is it about supporting ecommerce, enabling greater visibility, meeting sustainability reporting requirements, or managing collaboration/transactions with upstream suppliers or downstream customers? What are you looking to gain from network participation, and do certain vendors support necessary focus more than others?
- **Look for vendors that have experience in your industry or market segment and have the established network scale you require.** Are the trading partners you need there already?
- **Ensure that part of the evaluation considers your current set of supply chain applications.** The evaluation should consider either how the network will

integrate with those applications or if it is possible/appealing to use the network as a complete/partial replacement of those tools.

- **Ensure that the vendors you consider have both the existing necessary functionality and the future capabilities you will likely need.**

The usefulness of a supply chain network is a balance between what companies need today and what they expect to need in the future. In some ways, the more interesting discussion is about what the longer-term supply chain looks like and where/how new technologies and consumer expectations will dramatically affect the way that supply chains operate. Ensure, as you engage with a network vendor, that the vendor is at least thinking about what tomorrow may look like.

## VENDOR SUMMARY PROFILES

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

### Blue Yonder

Blue Yonder is positioned in the Leaders category in this 2025 IDC MarketScape on the worldwide multi-enterprise supply chain commerce network.

Blue Yonder is a global software firm specializing in end-to-end supply chain solutions. Blue Yonder offers solutions in supply chain planning, execution (e.g., logistics, warehouse, labor, and transportation), network collaboration, and omni-channel commerce (e.g., space and floor planning, workforce, merchandising, store execution). In 2024, Blue Yonder acquired One Network, a multi-enterprise business network. One Network viewed traditional ERP as old and antiquated — rooted in the 1970s; an inwardly focused transaction system not optimally suited to support an outsourced supply chain. One Network's vision was to move to a single global face for all suppliers and customers across all tiers, in a multiparty community. This approach, now delivered as the Blue Yonder Network, offers a real-time view of all the underlying processes and takes system lead times down to zero with a single objective function of how to meet end-consumer demand and coordinate all necessary parties.

Blue Yonder's client base spans the globe and reaches nearly all industries, including distribution (including wholesale and retail), discrete manufacturing, and process manufacturing, while also serving clients in life sciences and MRO/spare parts.

Blue Yonder is an established supply chain network vendor to the markets it serves. Blue Yonder sells a network platform designed for multiparty, many-to-many business

solutions with a suite of functional industry modules that can be adapted and extended to meet customers' exact needs without losing the ability to upgrade. Specifically, the Blue Yonder Network includes a network platform, distributed master data management, control tower capabilities across all solution areas, and a full range of analytics with order, shipment, and inventory visibility. The network enables unified end-to-end processes across supply chain management/planning, store planning and execution, distribution center (DC) operations, and global logistics capabilities.

The Blue Yonder Network currently has over 175,000 active users on its network.

## Strengths

Blue Yonder's strengths include:

- **Multi-enterprise transparency:** Companies need to reduce latency in visibility and interpretation of change, including those arising from events beyond their four walls. Users collaborate on the network to synchronize plans and actions with their connected community. This process enables continuous, autonomous assessment of network flows, bottlenecks, and imbalances between supply and demand across nodes.

  The network foundation uniquely supports many-to-many relationships with patented capabilities. Workflows incorporate multiple perspectives and therefore simultaneously support more feasibly constrained plans and more holistically optimized execution.
- **Distributed master data management (MDM) and an embedded digital twin:** It allows users to access relevant information on inventory, capacity, and commitments — perpetually updated — as well as insights on impact to the company's performance metrics. The system continuously monitors, detects, assesses, and recommends actions to mitigate risk and resolve disruptions. Each participant derives value in managing their operations not as static entities but against real-world dynamics and in coordination with the actions of their trading partners.
- **Multiparty, multitier coordination and orchestration (interoperability):** It facilitates optimized use of resources across procurement, production, and distribution processes. It provides broad-based insight into perpetual inventory and capacity across supply chain network nodes. With a patented multiparty collaborative underpinning, users move beyond point-to-point data sharing to facilitate a coordinated response. Customers can more dynamically analyze and adapt for better capacity utilization, reducing bottlenecks and enhancing flow efficiency.
- **Functional depth:** An area of significant investment, it has focused on workflows when broader or deeper functional analysis is warranted. Although the network

retains its ability to interact agnostically with customers' existing enterprise applications (e.g., ERP, WMS, TMS, OMS, and SCP applications), Blue Yonder has made investments in seamless interoperability with its broader footprint in several key accounts.

## Challenges

One significant challenge is ensuring data quality. Frequently, Blue Yonder's clients provide data that is not as clean as initially perceived, necessitating the use of MDM capabilities to cleanse and refine their data before implementation.

In addition, the company often faces confusion in the market when other companies provide control towers that offer visibility only. The Blue Yonder Network solution encompasses complete visibility and actionability, full permission control for all network participants, and the ability to concurrently address complex "if then" scenarios. For example, if demand shifts, materials become limited, or carbon metrics need consideration, the company determines the optimal resolution.

## Consider Blue Yonder When

Manufacturers (particularly CPG and automotive/heavy equipment), pharmaceuticals, transportation/logistics, and retail companies looking for a platform vendor of both supply chain network and SCM applications should consider the Blue Yonder Network. The Blue Yonder Network offers a robust collaborative environment for its customers and becomes an extension of their internal staff and resources to optimize their supply chains.

# APPENDIX

## Reading an IDC MarketScape Graph

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

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

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

customer segments, and business and go-to-market plans for the next three to five years.

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

Each of the 18 vendors evaluated for this IDC MarketScape has a well-rounded scope of capabilities related to multi-enterprise supply chain commerce networks. All vendors ended up in the Leaders or Major Players segments due to the ability to meet the core requirements of having both broad functional expertise and a significant network customer base.

## IDC MarketScape Methodology

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

## Market Definition

IDC Manufacturing Insights defines a multi-enterprise supply chain commerce network as any platform that facilitates both the exchange of information and enables transactions among disparate parties pertaining to the supply chain or to supply chain processes. In today's fast-paced, highly analytical supply chain, the use of networks to facilitate commerce and collaboration can mean the difference between meeting supply chain performance goals and not meeting goals.

A best-in-class supply chain of the future must be highly collaborative and have broad visibility into supply. The reality is that supply chains rely on suppliers and enablers more today than at any time in the past, and as the definition of "core competency" continues to refocus, they will rely on these partners even more in the future. Although 1:1 relationships may persist in certain areas (e.g., direct materials procurement), the world is moving to networks and marketplace ecosystems.

## LEARN MORE

## Related Research

- *IDC FutureScape: Worldwide Manufacturing 2026 Predictions* (IDC #US53860625, October 2025)
- *The Influence of Sustainability on Industry Ecosystems and Business Networks* (IDC #US53840725, October 2025)
- *2025 Industry Ecosystems and Business Networks Study: Overall Results and Findings* (IDC #US53840325, October 2025)
- *AI/ML Investment Plans for Industry Ecosystems and Business Network Initiatives* (IDC #US53840825, October 2025)
- *2025 Supply Chain Survey: North America Findings and Implications* (IDC #US53709425, August 2025)
- *Concerns Slowing Participation in B2B Collaboration Networks by Operational Segment* (IDC #US53649225, July 2025)
- *IDC MarketScape: Worldwide Multi-Enterprise Supply Chain Commerce Network 2023 Vendor Assessment* (IDC #US49948423, December 2023)

## Synopsis

This IDC study uses the IDC MarketScape model to provide an assessment of several providers participating in the multi-enterprise supply chain commerce network market. The IDC MarketScape is an evaluation based on a comprehensive framework and a set of parameters that assesses providers relative to those factors expected to be most conducive to success in a given market during both the short term and the long term.

"The push to outsource supply chains has created opportunities but also challenges, namely the ability to communicate in real time and have acceptable levels of visibility both upstream and downstream has become increasingly problematic. As organizations look for ways to respond more effectively to disruption, the ability to work within the appropriate set of supply chain networks will improve decision-making and raise the performance of the supply chain materially," says Reid Paquin, research vice president, Worldwide Industry Ecosystems and Business Networks Strategies.

## ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC''s analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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