This IDC MarketScape is a statifng point for manufacturers considerfng patifcipating in a multi-enterprise supply chain commerce network. The vendors included represent a "short list" ² a way to winnow down the long list of big and small service providers in the marketplace. This document does not replace the due diligence that companies must do to evaluate which vendor fits their specific needs and circumstances.

IDC believes 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 network becomes a "must-have" rather than just a "nice to have."

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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

A multi-enterprise supply chain commerce network can be a single platform or a platform integrated into 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 to, 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, the value of any network is a function of the number of participants on the platform. Hence the ability to seamlessly scale is important.

Several vendors are offering multi-enterprise supply chain commerce networks to the market. This IDC MarketScape intends 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 offered multi-enterprise supply chain commerce tools for at least three years.

Vendors must have at least 10 referenceable client engagements.

Each of the 14 vendors included in this document meets these requirements. However, some vendors run networks that focus on a particular functional area within the supply chain, manage a particular enterprise task, or even support a specific industry.

ADVICE FOR TECHNOLOGY BUYERS

The global COVID-19 pandemic has accelerated the company's desire to be more resilient, with recent IDC surveys suggesting that multisourcing is high on the list of strategies to accomplish that goal. On the heels of every major disruption, talk of near-shoring resurfaces. Whether we see the movement of manufacturing locations or just final assembly remains to be seen, but there is no question that the

networks that enable collaboration, visibility, and seamless trade are becoming an increasingly important tool.

The outsourcing opportunity, of course, is well known and long established, and it has been either to allocate activities to external parties for whom the said activity is core competency or as 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 with 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 ² either for the first time or as a complement to existing network participation ² 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 experience levels 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 with experience in your market segment and 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 how the network will integrate with those applications or whether it is possible/appealing to use the network as a complete/partial replacement of those tools.

> Ensure that the vendors you consider have the 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 the longer-term supply chain and where/how new technologies and consumer expectations will dramatically affect how supply chains operate. As you engage with a network vendor, ensure that the vendor is at least thinking about what tomorrow may look like.

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OpenText

OpenText is positioned as a Leader in this 2023 IDC MarketScape for the worldwide multi-enterprise supply chain commerce network market.

OpenText is a global software vendor providing information management applications, and its business network division covers a broad range of industry markets, including CPG, high tech, automotive/heavy equipment, and retail. The company was founded in 1991, and in 2014, it acquired GXS, a notable business network company. OpenText is headquartered in Waterloo, Ontario, Canada.

OpenText's MSCCN offering is built on a unified integration platform, Trading Grid. It includes the core integration platform capabilities around data exchange, process orchestration, and user-facing features for viewing and managing the data exchanged across their partner networks. In addition, they offer several add-on modules (Active Apps, IoT, IAM, and analytics) that leverage the data exchanged through Trading Grid to bring additional capabilities for the users to gain insights on and manage their supply chain processes. Notable components of the solution offering include:

Trading Grid: A unified integration platform for any-to-any integration, including highly flexible process orchestration leveraging traditional message and file-based integrations and/or modern API-driven connectivity across a broad range of communication protocols and data formats. In addition to the integration platform capabilities, Trading Grid includes a set of user productivity and visibility tools, including Trading Grid Online portal for single sign-on to all OpenText MSCCN tools and modules, Service-Level Management for platform uptime and contractual SLA reporting, Community Projects for integration project management and tracking, Cartographer for managing integration maps and cross-reference tables, and Lens for extensive transaction life-cycle visibility, reporting, and event (or nonevent) notifications and management.

Active Orders: This enables customers to digitize the procure-to-pay process with all trading partners, including portal functionality for non-EDI-capable partners. It helps manage orders, invoices, and inbound shipments, provides full end-to-end transaction visibility, including logistics visibility and arrival prediction, provides a mobile app to allow suppliers to accept and respond to orders, and includes supplier and carrier KPIs and reporting.

Active Intelligence: This highly configurable workflow engine introduces business rules, content validation, and cross-document matching for exchanged transactions with the ability to quarantine and/or reject transactions based on predefined criteria.

Active Risk Monitor: This supplier risk management dashboard integrates risk insights from multiple sources and matches them against uniquely identified suppliers that the customer
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Related Research

IDC FutureScape: Worldwide Manufacturing Supply Chain 2024 Predictions (IDC #US50873823, October 2023)

IDC MaturityScape: Digital Supply Chain Resiliency 1.0 (IDC #US48402418, December 2021)

IDC MarketScape: Worldwide Multi-Enterprise Supply Chain Commerce Network 2021 Vendor

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. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world'