

IDC MarketScape

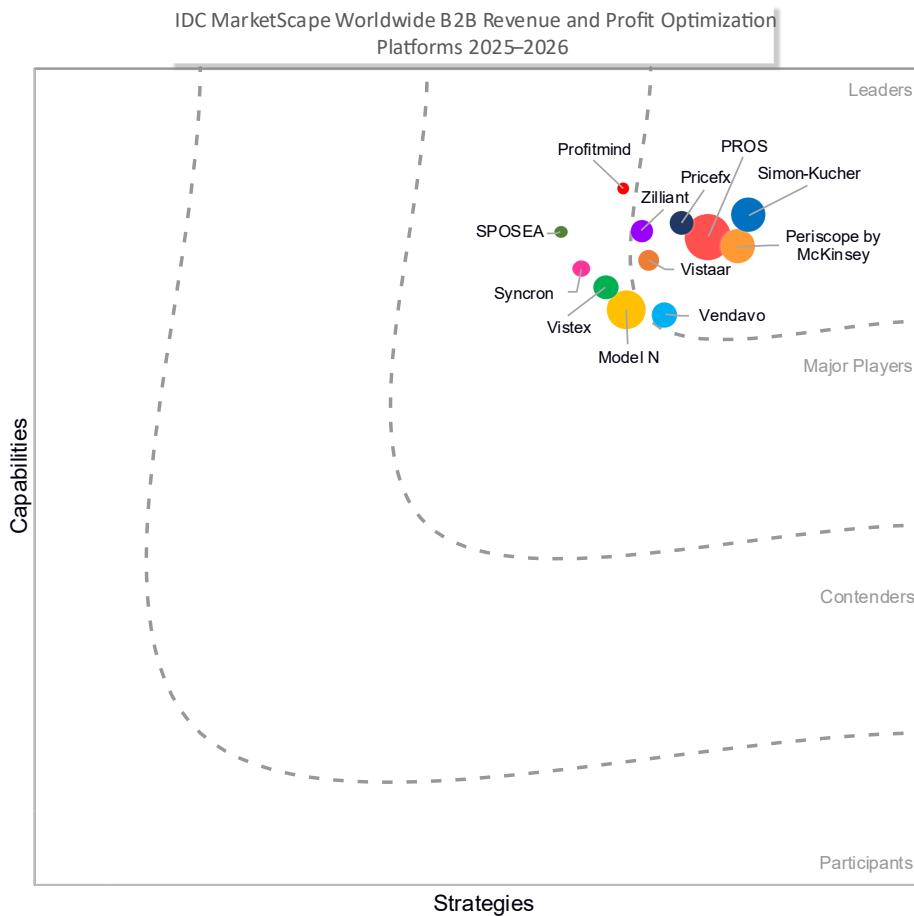
IDC MarketScape: Worldwide B2B Revenue and Profit Optimization Platforms 2025–2026 Vendor Assessment

Tiffany McCormick

THIS EXCERPT FEATURES SIMON-KUCHER

IDC MARKETSCAPE FIGURE

FIGURE 1: IDC MarketScape: Worldwide B2B Revenue and Profit Optimization Platforms 2025–2026 Vendor Assessment



Source: IDC, 2025

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

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide B2B Revenue and Profit Optimization Platforms 2025–2026 Vendor Assessment (Doc # US52034524). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

For a company to confidently achieve its revenue, margin, or profit goals in 2026 and beyond, pricing must evolve from manual management or back-office administration to proactive orchestration of data, analytics, and automation across channels. Technology buyers should expect platforms that leverage rich, multisource data to drive highly automated, algorithmic pricing decisions, integrating analytics, forecasting, ML, and optimization science to achieve margin, inventory, and revenue goals across sales channels and geographies.

Based on extensive research with vendors and direct customer experience data, IDC finds that the most advanced B2B revenue and profit optimization (R&PO) platforms combine robust core pricing and optimization capabilities with intuitive, role-based interfaces that support enterprisewide strategic pricing governance, seamless deal management, and channel-agnostic execution. This research assesses each vendor's ability to provide scalable pricing automation, optimization, advanced analytics, forecasting, and explainable AI, as well as flexibility, transparency, and actionable intelligence — allowing organizations not only to manage price but also to integrate across sales, finance, product, and digital commerce systems.

These platforms analyze internal and external data, such as customer behavior, competitive prices, and inventory levels, to recommend optimal prices that balance profitability, competitiveness, and governance. Modern R&PO platforms represent a significant leap beyond spreadsheet-based workflows by enabling explainable, scalable, and real-time pricing aligned with corporate strategy.

Summary of Key Trends in the B2B Revenue and Pricing Optimization Market

As pricing becomes a board-level growth lever, B2B enterprises face growing pressure to manage margin leakage, competitive volatility, and product complexity in real time.

Customer feedback consistently highlights tangible business outcomes where their company dramatically improves the pricing process and the product more than pays for itself within three months. Customers reported that automated pricing systems have enabled them to process millions of price changes within a single year, protecting margins during volatile cost cycles that would have been unmanageable under manual processes. Others cited measurable profit gains, such as several millions of dollars in incremental sales and profit, achieved within months of deployment. In complex deal environments, advanced analytics and dynamic scoring capabilities have provided visibility into discounting behaviors and opportunities that were previously invisible, resulting in stronger governance and improved gross profit realization. IDC's analysis highlights the following key trends shaping the market in 2025:

- **Excel's influence is fading but still formidable:** Vendors still compete against spreadsheet inertia, but it is steadily giving way to modern R&PO systems as organizations demand faster reaction times, stronger governance, and greater complexity.
- **AI is everywhere, but explainability is critical:** Pricing is already complex, and AI adds another layer of opacity. Buyers increasingly demand explainable models and human-in-the-loop control to understand and trust algorithmic pricing decisions.
- **User experience drives adoption:** Speed to market, configurable workflows, "glass box" pricing engines, flexible price waterfalls, and scenario simulation differentiate the UX, helping organizations accelerate change management and maximize adoption.
- **From price management to commercial orchestration:** R&PO vendors are expanding into full revenue and profit optimization suites, unifying pricing, rebates, and quoting to drive holistic commercial outcomes.
- **Midmarket expansion is accelerating:** Vendors are introducing modular deployments, preconfigured industry templates, and rapid time-to-value offerings to serve midsize enterprises with lower revenue and less complexity.

Figure 2 illustrates revenue and profit optimization applications.

FIGURE 2**Revenue and Profit Optimization Applications**

Source: IDC, 2025

In addition to these foundational advancements, IDC's research highlights that the R&PO platforms work to distinguish themselves through their varying approaches to extensive integration capabilities, industry-specific solutions, and customer-centric change management. The ability to connect seamlessly with core enterprise systems, such as CRM, ERP, commerce, and inventory platforms, accelerates deployment and enables unified pricing logic and process efficiency across global businesses. Digital transformation pressures and channel convergence further require platforms to be adaptable, supporting traditional sales, ecommerce, B2B2C, and partner channels with transparent, auditable workflows that empower both frontline and strategic executives. Importantly, feedback from enterprise customers underscores that they can achieve the most significant value when platforms deliver both automation and insight, allowing organizations to simulate, measure, and adjust pricing strategies with real-time agility and governance. As companies strive to optimize profitability amid ongoing disruption, competitive intensity, and margin uncertainty, R&PO solutions are evolving from transactional tools to strategic enablers of enterprise-wide growth, risk mitigation, and commercial innovation.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The vendor list selection for this evaluation depicts the vendors that are most representative of any given B2B R&PO application buyer's selection short list. Inclusion criteria include:

- The vendor has an active customer base, and other R&PO vendors report it as shown in deals.
- Customers can purchase and use the vendor's R&PO application separately from a larger suite of products.
- The vendor meets IDC's definition for a B2B R&PO application in terms of the functionality it supports, such as price management, optimization, and execution capabilities across multiple channels (see the Market Definition section).
- The vendor has customers that IDC can interview that have been using the vendor's application for at least one year.

ADVICE FOR TECHNOLOGY BUYERS

IDC research and customer evidence make it clear that investment in a modern R&PO platform is essential for companies that expect to maintain profitability in fast-moving markets. Organizations relying on manual workflows or legacy back-office tools are now operating at a structural disadvantage. Across industries, buyers reported that having well-equipped pricing teams using advanced pricing systems that incorporate business goals with AI/ML modeling has been key to their success and profit. The competitive stakes have shifted; pricing agility, transparency, and explainable AI are the new baseline capabilities for commercial success.

When evaluating price optimization and management (PO&M) vendors, technology buyers should:

- **Prioritize explainable AI over opaque complexity:** Seek solutions that make pricing recommendations transparent, traceable, and adjustable by business users. The ability to understand why a price is recommended will be key to driving user confidence and sales adoption.
- **Validate integration and data readiness early:** Seamless connectivity with ERP, CRM, configure price quote (CPQ), and ecommerce systems is now a baseline expectation. Confirm that the vendor provides prebuilt connectors, data governance tools, and APIs to reduce implementation risk and time to value. Equally important, buyers must assess the quality and structure of their own pricing, transaction, and master data. Many R&PO platforms depend on accurate, normalized inputs to deliver optimal results, so organizations should

evaluate the current state of their data and select a platform flexible enough to meet them where they are.

- **Focus on speed to value and scalability:** Successful deployments increasingly show ROI in less than three months. Buyers on the fence should look for modular architectures that can start small (optimizing a single region or product line) and scale enterprise-wide without reimplementation.
- **Assess the capacity, maturity, and influence of the pricing team:** A platform's effectiveness is a two-way street; even the most advanced platforms require a skilled pricing organization to interpret insights, set guardrails, and continuously refine pricing strategies. Ensure that internal teams or partner resources possess the staffing and analytical/business acumen needed to fully utilize the platform's capabilities.
- **Assess usability and adoption support:** The ROI varies greatly depending on the platform's adoption rate across pricing, sales, product, and finance teams. Evaluate user experience, dashboards, explainability in plain language, configurability, and the quality of enablement, training, and customer success programs.
- **Evaluate organizational change management readiness:** Pricing transformation requires a cultural shift toward data-driven decision-making. Buyers should assess how well their organization can adapt existing approval processes, incentive structures, and governance models to leverage new automation and analytics capabilities and insights.
- **Balance innovation with stability:** The best platforms pair advanced capabilities, such as agentic AI and natural language interaction, with proven governance, auditability, and human-in-the-loop oversight.
- **Look for evidence of industry-specific expertise:** Vendors with verticalized templates, elasticity models, and best practice workflows will accelerate adoption and improve accuracy in pricing decisions.

Ultimately, IDC advises technology buyers to approach R&PO investment as a core pillar of their commercial transformation strategy, not as a standalone pricing tool. The goal is not only to set better prices but to embed intelligence across quoting, rebate, and revenue processes that together drive profitable growth. The most successful organizations are those that confidently deploy R&PO platforms equipped to orchestrate analytics, automation, and strategic data usage across every sales channel, enabling rapid adaptation to customer, competitor, and market changes. Delaying investment in scalable, integrated, and intelligent pricing automation may limit opportunities, reduce agility, and affect returns.

VENDOR SUMMARY PROFILES

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

Simon-Kucher

IDC positioned Simon-Kucher in the Leaders category in this 2025–2026 IDC MarketScape for worldwide B2B revenue and profit optimization platforms.

Simon-Kucher is a global consultancy specializing in revenue and profit optimization through the integration of commercial strategy, advanced analytics, and technology. Founded in 1985 and headquartered in Bonn, Germany, Simon-Kucher is a privately owned partnership, owned by more than 200 partners who are also entrepreneurs in the company. The company's software arm, Simon-Kucher Engine, delivers proprietary platforms, including the core SK Pricer solution for price optimization and management across B2B and B2C environments. Simon-Kucher's approach tightly aligns strategic consulting, technology deployment, and ongoing support to enable sustainable, measurable growth for its clients.

Key attributes of the company are as follows:

- **Industry specialization:** B2B sectors, including healthcare, life sciences, industrials, technology, financial services, media, and telecom
- **Optimization capability:** Value-based methods with configurable algorithms, price waterfalls, simulations, price corridors/targets, and seller guidance
- **Dynamic pricing:** SK Dynamica, which provides AI-based dynamic price optimization with real-time automation (e.g., SmartRates), and SK Pricer, which augments personalization at the account/opportunity level via insight agents
- **Data management:** Custom ETL and flexible data integration that allow real-time, batch, and streaming dataflows with automated validation and transformation supporting structured and unstructured data with configurable pipelines
- **Ecosystem integration:** SK Engine, which positions its apps to coexist with CRM/CPQ rather than displace them and delivers its vertical apps as cloud software that integrates with customers' systems of record

Strengths

- Simon-Kucher combines its commercial strategy expertise with configurable, client-tailored software made for pricing and sales teams. The SK Pricer platform

operationalizes pricing strategy directly within the application. This close linkage between strategy and software accelerates implementation timelines and helps organizations shorten time to value and reduce change management barriers.

- SK Pricer places significant emphasis on its configurable, visually driven interface and workflow design. Users benefit from low-code and drag-and-drop tools for configuring pricing logic, creating simulations, and managing discount conditions without reliance on IT. Flexibility exists within almost every aspect of the platform, from changing the margin calculation to changing the base on the price waterfall from product costs to an anchor product price, competitor price, or even multiple products.
- The platform employs AI and advanced analytics to surface actionable insights (via insight agents) that recommend pricing actions, highlight value drivers, and assist with segmentation. All AI recommendations offer transparency so users can drill into the logic, see comparable deals, review the data behind suggestions, and override automated outputs as needed. The company tailors custom AI models (e.g., elasticity estimation and win-loss propensity) for each client, and agentic AI features support autonomous scenario building within business constraints.

Challenges

- While feature-rich in price setting, governance, and simulation, SK Pricer's functional scope in adjacent areas (such as rebate management, contract life-cycle management, and comprehensive channel incentives) lags more mature, one-stop platforms. Current road maps identify these modules as priorities for future investment, but depth of out-of-the-box capabilities is presently limited, and specialized needs may require custom development.
- SK Pricer may not offer the same historical depth of integrations, third-party ecosystem relationships, or community content as longer-established software vendors. While the underlying technology is scalable and extensible, some connectors (such as ecommerce) have partial support or are on the short-term road map. Customers with highly heterogeneous architectures or a preference for prebuilt integrations may face steeper effort in onboarding.
- Simon-Kucher does not maintain ISV or SI partnerships, opting instead for direct sales and internal implementation resources, and the platform does not offer proprietary competitive intelligence or automated price scraping capabilities out of the box, limiting coverage for organizations seeking partner-driven delivery and advanced external market insights.

Consider Simon-Kucher When

Consider Simon-Kucher for organizations that value the direct link between strategic advisory, advanced analytics, and highly tailored software delivery. Enterprises with complex or evolving pricing strategies and pricing and sales teams who require strong explainability and hands-on implementation in addition to robust AI and simulation capabilities will benefit most from this integrated offering. The platform is particularly attractive where bespoke transformation, deep industry expertise, or alignment to a global consulting partner is a key selection criterion.

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.

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

Price optimization and management applications are software platforms that leverage data (customer history/behavior, competitor pricing, inventory, weather, etc.) to make algorithmic decisions on the best price for items to achieve margin, inventory, and revenue goals across sales channels and locations. Algorithmic decisions leverage forecasting, segmentation, price elasticity models, ML, AI, and optimization sciences to set prices for logical groups of products across time, locations, and touch points.

Revenue and profit optimization platforms extend and evolve price optimization and management applications by including the ability for the solution to do profit or net-revenue optimization by considering discounts, COGS, shipping, rebates, and trade promotions to manage price, typically with machine learning and adding explainability. In addition, we want to evaluate vendors abilities to do dynamic and personalized pricing which typically requires injecting external data into the pricing analysis.

Therefore, evaluating the solution's data management capabilities is also in scope. This is in addition to the core price management and optimization capabilities that leverage data to manage pricing, segment customers, and make algorithmic decisions on the best price for items to achieve margin, inventory, and revenue goals across sales channels and locations.

IDC segments the revenue and profit optimization platform marketplace into two groups:

- **B2B R&PO applications (the focus of this IDC MarketScape):** These applications focus on pricing offerings that a salesperson typically sells but are increasingly being sold via B2B ecommerce and direct to consumer via B2C and B2B2C. They should have extensions/UIs that enable efficient management and communication of price and price change context to sales and customers (deal management, price guidance, and configure price quote) across channels to ensure the company can achieve its revenue, margin, or profit goals.
- **Retail-focused B2C PO&M applications:** Customized for pricing retail merchandise across channels, these applications have life-cycle pricing capabilities to price merchandise as it moves through the various stages of retail life: regular, introduction, promotion, markdown, and clearance pricing.

LEARN MORE

Related Research

- *From Competition to Combination: Assessing the PROS and Conga Merger* (IDC #IcUS53848225, October 2025)
- *AI Monetization Cube: A Systematic Framework for Pricing AI Offerings* (IDC #US53568425, July 2025)
- *Navigating Tokenized Pricing Models* (IDC #US52136225, July 2025)
- *IDC MarketScape: Worldwide Business Intelligence and Analytics Platforms 2025 Vendor Assessment* (IDC #US52034725, July 2025)
- *Consumption-Based Pricing in the AI Era* (IDC #US53300325, April 2025)
- *GenAI Pricing Models Survey Spotlight: Which Pricing Models Do Companies Prefer for GenAI Applications?* (IDC #US53146925, February 2025)
- *IDC MarketScape: Worldwide Configure Price Quote Applications for Commerce 2024-2025 Vendor Assessment* (IDC #US50608124, December 2024)

Synopsis

The IDC study examines the rapid transformation of the pricing discipline from manual, back-office processes to needing advanced, AI-driven platforms that integrate data, analytics, and automation for real-time, explainable pricing decisions. The report evaluates vendors on their capabilities in pricing automation, analytics, integration, and user experience, highlighting the strategic importance of these platforms for commercial agility, governance, and measurable business outcomes. Key market trends include the shift away from spreadsheets, the critical need for explainable AI, user experience as a driver of adoption, and the expansion of platforms into holistic monetization ecosystem orchestration of the commercial organization. The assessment provides detailed vendor profiles, strengths, and challenges, offering guidance for technology buyers to prioritize transparency, integration, scalability, and industry expertise when selecting solutions. Ultimately, the report underscores that organizations adopting modern R&PO platforms need to bolster their pricing teams and gain a competitive edge in fast-moving markets, while those relying on legacy tools and underinvested pricing team risk falling behind.

"We are fast approaching a world where pricing agility defines winners and laggards. The pace of change is accelerating, and organizations need the right tools so their pricing can adapt just as fast. The future of profitable growth belongs to those who harness explainable AI, real-time analytics, and automation with a pricing team empowered to drive change and grow profit. Pricing is a strategic lever that needs C-suite investment and attention, not a back-office afterthought." — Tiffany McCormick, research director, AI Monetization, Pricing Strategies, and Business Models

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.).

Global Headquarters

140 Kendrick Street
Building B
Needham, MA 02494
USA
508.872.8200
Twitter: @IDC
blogs.idc.com
www.idc.com

Copyright and Trademark Notice

This IDC research document was published as part of an IDC continuous intelligence service, providing written research, analyst interactions, and web conference and conference event proceedings. Visit www.idc.com to learn more about IDC subscription and consulting services. To view a list of IDC offices worldwide, visit www.idc.com/about/worldwideoffices. Please contact IDC at customerservice@idc.com for information on additional copies, web rights, or applying the price of this document toward the purchase of an IDC service.

Copyright 2025 IDC. Reproduction is forbidden unless authorized. All rights reserved.