# Nordic Commercial Architecture Benchmark 2026

How Nordic B2B tech and digital services companies turn capabilities into buyable offerings, repeatable demand and profitable growth

**Prepared by Murros Advisory**
Commercial architecture for B2B tech growth

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# Contents

A structured overview of the benchmark, its methodology, market-level findings and the path from external view to company-specific discussion.



Company-specific insights are discussed separately.

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# Why this benchmark exists

**Observed pattern recognition across Nordic B2B tech and digital services companies**

This benchmark started from a pattern I kept seeing across B2B tech and digital services companies. Many companies have strong capabilities, credible people and relevant technology expertise. But from the outside, those strengths do not always translate into a clearly buyable offering, repeatable demand or profitable growth.

The issue is rarely lack of competence. More often, the gap sits in the commercial architecture: how the company chooses growth themes, frames buyer problems, packages expertise, creates demand and connects the offering to revenue and profitability.

**Murros point of view**

Capabilities do not automatically create growth. They need to be translated into commercial architecture.

The benchmark makes this pattern visible and concrete: how Nordic B2B tech and digital services companies translate capability into commercial clarity — and where stronger focus, productisation and growth architecture could unlock more value.

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# Executive summary

External commercial architecture benchmark of 30 Nordic B2B tech and digital services companies

| 30 | 6 | 100 | External |
|---|---|---|---|
| Companies assessed | Dimensions | Point model | Public signals only |

**The core question:**

How well does each company appear to translate strong capabilities into a clearly buyable offering, repeatable demand and profitable growth?

### Key findings

- Strong capabilities are common. Clear commercial ownership is less common.
- Broad capability portfolios can create commercial blur.
- AI is visible almost everywhere, but often not yet commercialised into growth architecture.
- The strongest companies make buying easier by connecting positioning, problem ownership, offering structure and repeatable demand.
- Profitability increasingly depends on focus, productisation and commercial discipline.

### Report snapshot

- 30 Nordic companies assessed
- 6 commercial architecture dimensions
- 100-point scoring model
- External public signals only
- Company-specific interpretation discussed separately

# The commercial architecture lens

Capabilities need translation before they become commercial growth

In B2B tech and digital services, the constraint is rarely lack of capability. The more common constraint is whether capability is clear enough to buy, focused enough to scale, differentiated enough to matter, packaged enough to sell repeatedly and commercially disciplined enough to support profitability.

**Capabilities** → **Buyable offering** → **Repeatable demand** → **Profitable growth**

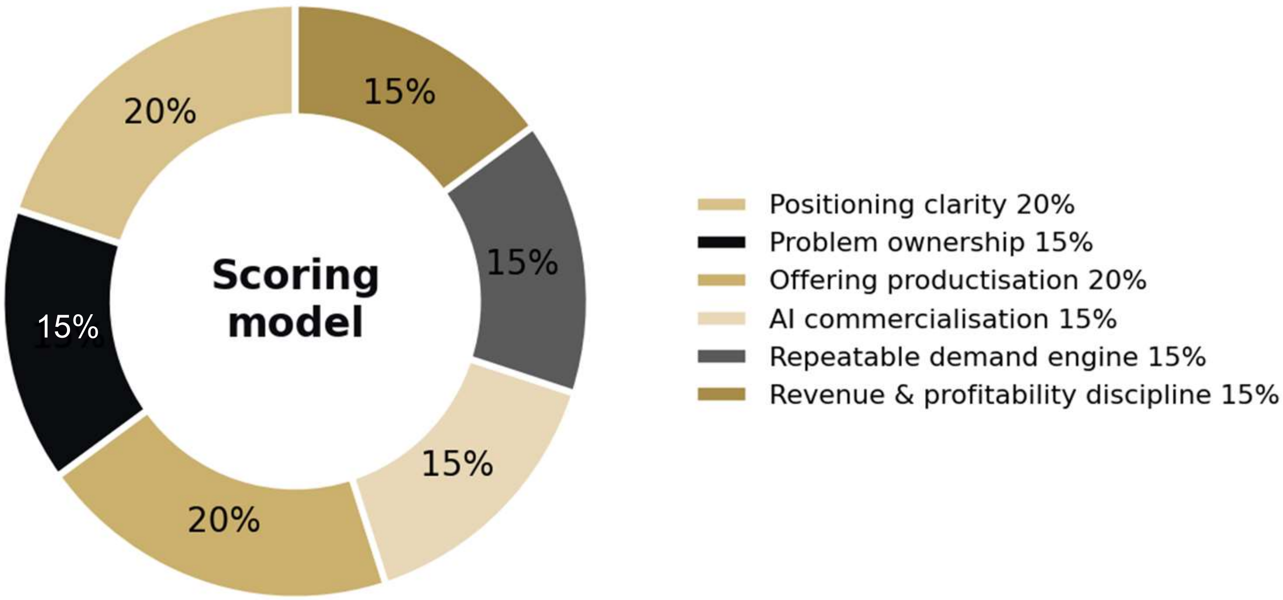
## Definition

Commercial architecture connects what a company can do with what the market can understand, buy and value. It brings together positioning, buyer problems, offering structure, demand motion and revenue discipline.

# Assessment model

Six dimensions, weighted by commercial impact

The weighting gives extra emphasis to the two dimensions that most directly affect whether a company becomes easy to buy: positioning clarity and offering productisation.




**1. Positioning clarity — 20%**
How clearly the company communicates what it stands for, who it serves and why it should be chosen.

**2. Problem ownership — 15%**
How clearly the company appears to own specific buyer problems rather than only describing capabilities or services.

**3. Offering productisation — 20%**
How clearly capabilities are packaged into understandable, repeatable and commercially usable offerings.

**4. AI commercialisation — 15%**
How clearly AI is translated into business outcomes, growth themes, offerings or operating models — not only described as a technical capability.

**5. Repeatable demand engine — 15%**
How clearly the company appears to create repeatable market demand around selected themes, problems or categories.

**6. Revenue and profitability discipline — 15%**
How clearly the company connects its commercial focus to growth, margin, scalability, pricing power or business performance.

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# Methodology

External public signals only — not internal performance diagnosis

### BASED ON EXTERNAL SIGNALS

- Company websites
- Offering structure
- Public strategy communication
- Investor communication where available
- Public financial or growth signals
- Leadership and management structure
- Visible AI, data and digital commercialisation

### NOT BASED ON INTERNAL DATA

- Internal pipeline quality
- Win rates
- Pricing
- Sales execution
- Customer economics
- Delivery profitability
- Leadership alignment
- Internal prioritisation
- Actual buyer perception

The benchmark shows what is visible from the outside. It does not claim to know the internal commercial reality of each company.

**Discussion starter**

Does the external commercial view match the internal reality?

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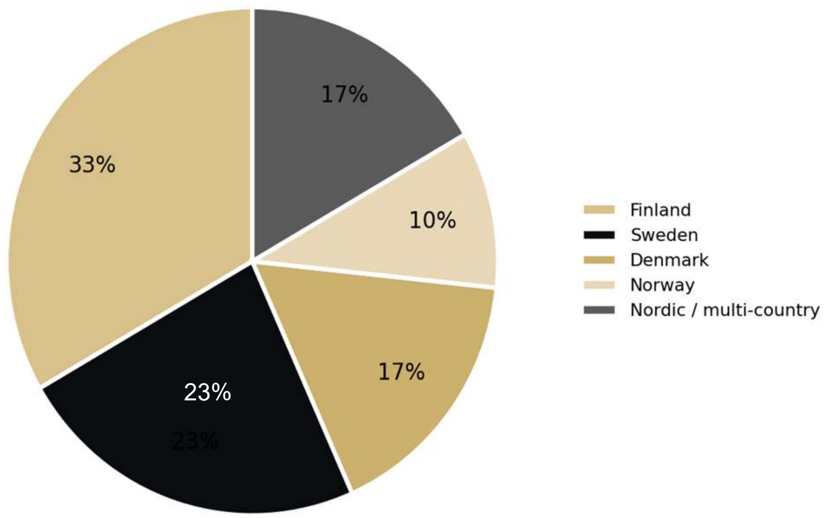
# Peer group

30 Nordic B2B tech and digital services companies

**Peer group market split**

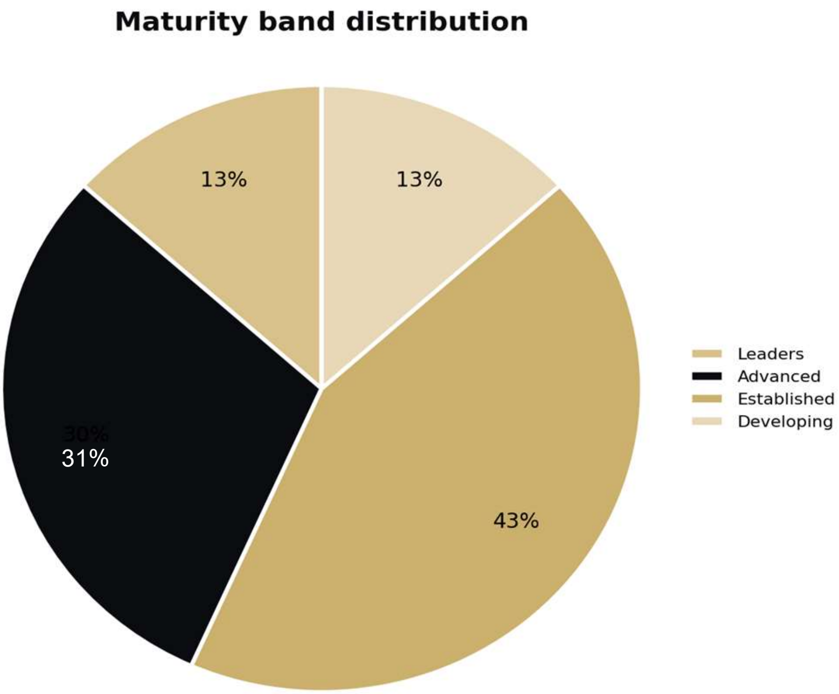



**Companies included**

1. Visma
2. Sinch
3. cBrain
4. Netcompany
5. Eficode
6. Systematic
7. Gofore
8. Sopra Steria Norway
9. Trifork
10. Reaktor
11. Digia
12. NNIT
13. Futurice
14. Solita
15. Tietoevry
16. Loihde
17. Atea
18. Vincit
19. Crayon / SoftwareOne
20. Bouvet
21. Siili
22. Knowit
23. AFRY
24. Itera
25. Netlight
26. Netum
27. twoday
28. B3 Consulting Group
29. Sigma Technology Group
30. CombinedX

# Overall maturity distribution

Four maturity bands based on total commercial architecture score




**Leaders: 85–100**

Very strong external commercial clarity, focused positioning and repeatability signals.

**Advanced: 75–84**

Strong commercial architecture, with room to sharpen ownership, packaging or repeatability.

**Established: 65–74**

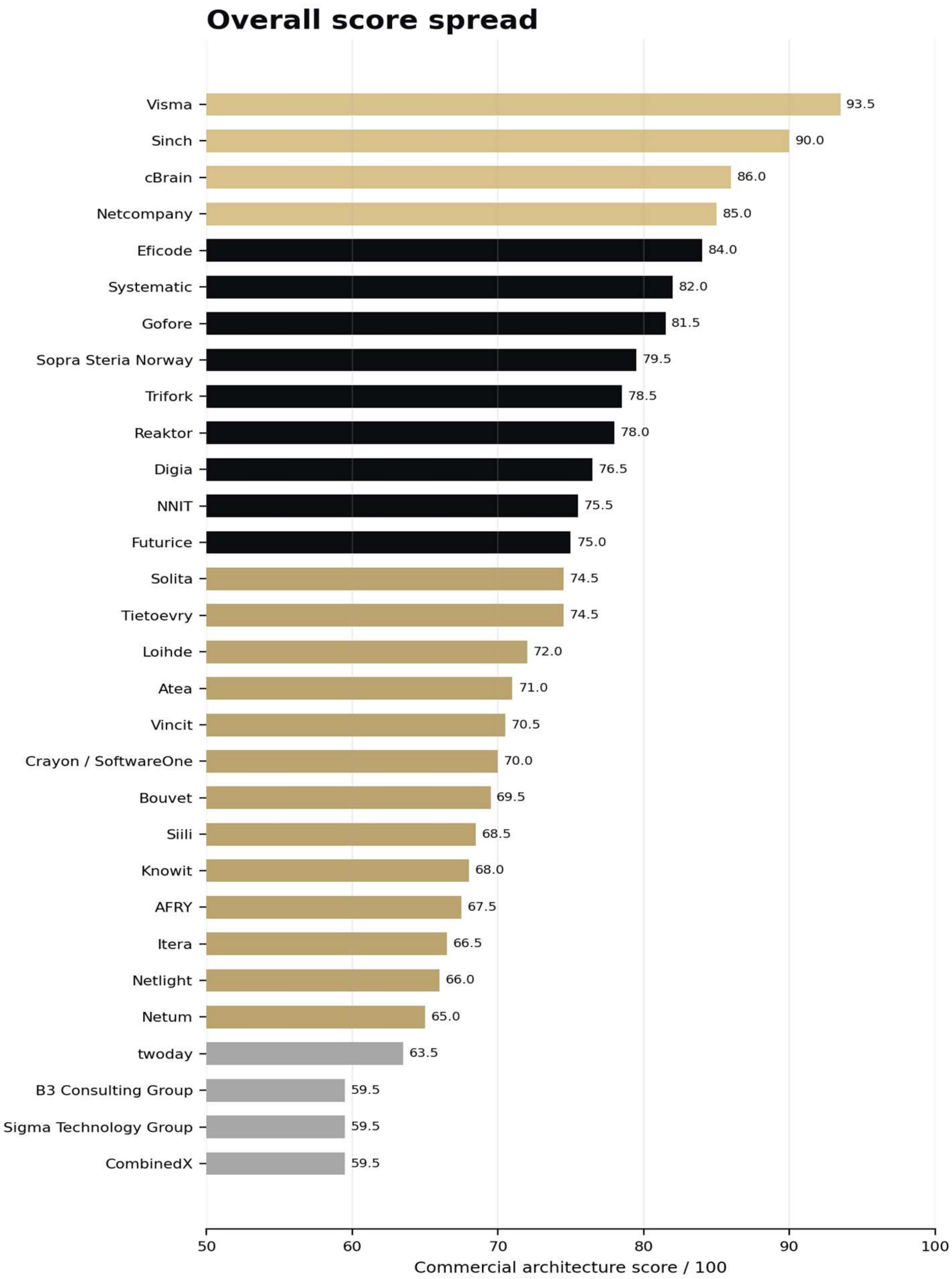
Credible capability and market relevance, but less consistent commercial translation.

**Developing: below 65**

Visible capability signals, but weaker external commercial clarity versus peers.

# Overall ranking by company

Four maturity bands based on total commercial architecture score



# Overall ranking

Commercial architecture maturity score / 100 — ranks 1–15

| Rank | Company | Score | Band |
|---|---|---|---|
| 1 | Visma | 93.5 | Leader |
| 2 | Sinch | 90.0 | Leader |
| 3 | cBrain | 86.0 | Leader |
| 4 | Netcompany | 85.0 | Leader |
| 5 | Eficode | 84.0 | Advanced |
| 6 | Systematic | 82.0 | Advanced |
| 7 | Gofore | 81.5 | Advanced |
| 8 | Sopra Steria Norway | 79.5 | Advanced |
| 9 | Trifork | 78.5 | Advanced |
| 10 | Reaktor | 78.0 | Advanced |
| 11 | Digia | 76.5 | Advanced |
| 12 | NNIT | 75.5 | Advanced |
| 13 | Futurice | 75.0 | Advanced |
| 14 | Solita | 74.5 | Established |
| 15 | Tietoevry | 74.5 | Established |

# Overall ranking

Commercial architecture maturity score / 100 — ranks 16–30

| Rank | Company | Score | Band |
|---|---|---|---|
| 16 | Loihde | 72.0 | Established |
| 17 | Atea | 71.0 | Established |
| 18 | Vincit | 70.5 | Established |
| 19 | Crayon / SoftwareOne | 70.0 | Established |
| 20 | Bouvet | 69.5 | Established |
| 21 | Siili | 68.5 | Established |
| 22 | Knowit | 68.0 | Established |
| 23 | AFRY | 67.5 | Established |
| 24 | Itera | 66.5 | Established |
| 25 | Netlight | 66.0 | Established |
| 26 | Netum | 65.0 | Established |
| 27 | twoday | 63.5 | Developing |
| 28 | B3 Consulting Group | 59.5 | Developing |
| 29 | Sigma Technology Group | 59.5 | Developing |
| 30 | CombinedX | 59.5 | Developing |

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# Market-level findings

What appears across the Nordic B2B tech peer group

**1. Strong capabilities are common**

Clear commercial ownership is rarer. The difference is not capability, but what the market can quickly understand and buy.

**2. Broad portfolios create blur**

Capability breadth can be positive for delivery but make the company harder to buy commercially.

**3. AI is visible almost everywhere**

The stronger opportunity is to translate AI into buyer problems, packaged offers and measurable business value.

**4. Leaders make buying easier**

Higher-ranking companies connect positioning, buyer problems, offering structure and demand motion.

**5. Profitability depends on focus and repeatability**

Margin advantage increasingly comes from sharper focus, pricing power, cross-sell, repeatable sales motions and disciplined prioritisation.

# AI winners: what separates them from the rest

AI as commercial architecture — not only a capability claim

AI winners connect AI to business outcomes, operating model change, measurable value and repeatable commercial growth.

**1. They connect AI to business value**

Research from McKinsey and BCG points to a widening gap between companies that use AI for growth and transformation versus those stuck in isolated pilots.

**2. They move from experimentation to scaled impact**

The commercial opportunity is not “we do AI” but helping buyers turn AI into measurable operational and business outcomes.

**3. They treat AI as operating model change**

AI impact depends on workflows, data, governance, adoption and leadership alignment — not only algorithms or tools.

**Murros interpretation**

In Nordic B2B tech, AI visibility is no longer enough. The question is who has commercialised AI into a growth architecture.

Sources: McKinsey State of AI 2025, BCG AI value research 2025, Deloitte State of Generative AI in the Enterprise.

# What leaders do differently

Five commercial behaviours visible in the strongest performers

**1. They make the buying situation clear**
They help the market understand when to choose them.

**2. They package capabilities around executive-level problems**
They translate capability into buyer-relevant commercial themes

**3. They create repeatable demand around selected themes**
They build demand around recognisable problems, not only broad service areas.

**4. They connect offering, narrative, sales motion and profitability**
Commercial architecture connects what is sold, how it is sold and how money is made.

**5. They use AI as part of a commercial growth architecture**
AI is stronger commercially when linked to outcomes and measurable customer value.

The strongest companies reduce buyer interpretation work.

# How to read an individual company view

Company-specific interpretation is used in meetings — not included in the public report

**Company-level meeting view**

Rank / score / maturity band / visible strength / development area / peer comparison / top quartile comparison / growth implication / profitability implication / discussion question.

The company-specific view is not included in this report because the external benchmark is only the starting point. The more useful discussion is how the external view compares with internal reality.

**Meeting question**

Does this external view match your internal commercial reality?

**Company-level card template**

- Rank: X / 30
- Score: X / 100
- Band: [Leader / Advanced / Established / Developing]
- Visible strength: [external observation]
- Development area: [one sharpened commercial architecture theme]
- Growth implication: [why it matters for demand / pipeline]
- Profitability implication: [why it matters for margin / pricing / utilisation]
- Discussion question: Does this match your internal view?

# From benchmark to action

The external view creates context; paid work diagnoses and defines change

### 1. External benchmark view

**Context:**

- Peer comparison
- External maturity view
- Visible market patterns
- Commercial development themes
- Market-level context

→

### 2. Commercial Reality Check

**Internal validation:**

- positioning
- ICP and buying situation
- offering clarity
- sales narrative
- demand motion
- pipeline logic
- commercial prioritisation
- profitability and repeatability

→

### 3. Commercial Development

**Direction, offering, GTM:**

- growth themes
- offering structure
- positioning direction
- sales narrative
- GTM priorities
- what to prioritise, change or stop

↓

### 4. Commercial Acceleration

**Market movement:**

- GTM activation
- demand and pipeline actions
- campaign / outreach themes
- sales enablement
- messaging
- execution cadence
- Leadership cadence and decision rhythm
- Partner / execution support where needed

**The benchmark shows what is visible from the outside. Commercial Reality Check clarifies what is really happening inside. Commercial Development defines what needs to change. Commercial Acceleration turns priorities into market movement.**

# Thank you

## Interested in your company-specific view?

**The benchmark provides the external market context. The company-specific discussion looks at how your organisation appears against the peer group – and whether the external view matches your internal commercial reality.**

**A company-specific discussion can cover:**

- Your benchmark position and maturity band
- Visible commercial strengths
- One development area compared to the peer group
- What appears to separate your company from the top quartile
- Growth and profitability implications
- Whether a deeper Commercial Reality Check would be useful

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