

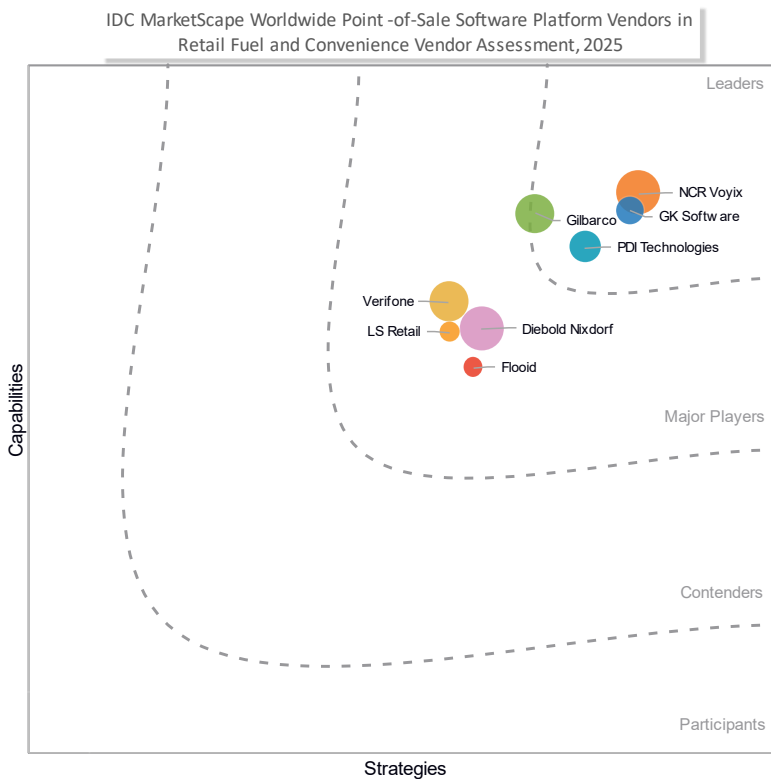
# IDC MarketScape: Worldwide Point-of-Sale Software Platform Vendors in Retail Fuel and Convenience 2025 Vendor Assessment

Margot Juros

**THIS EXCERPT FEATURES GK SOFTWARE AS A LEADER  
IDC MARKETSCOPE FIGURE**

**FIGURE 1**

## IDC MarketScape Worldwide Point-of-Sale Software Platform Vendors in Retail Fuel and Convenience Vendor Assessment



Source: IDC, 2025

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

## ABOUT THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide Point-of-Sale Software Platform Vendors in Retail Fuel and Convenience 2025 Vendor Assessment (Doc # US51800224).

## IDC OPINION

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The retail fuel and convenience segment has seen tremendous change in the past few years amid evolving technology needs, new business models, and significant changes in customer expectations. This means that legacy point-of-sale (POS) solutions are likely unable to meet the new needs of fuel and convenience retailers for success. Key pain points for this segment include waning customer loyalty, narrowing profits (meaning need for greater efficiency), fiercer competition resulting from market consolidation or convergence, and lack of agility to adapt to new market needs (such as EV charging, omni-channel, and self-service).

The technology needs of fuel and convenience retailers have evolved quickly in the past few years amid new market demands. For example, new technology needs may include a POS software solution that meets new omni-channel retail requirements, including frictionless payments across multiple touch points, such as pay at pump and mobile and self-checkout payments; seamless mobile ordering and payments, such as for foodservice; and mixed basket capabilities, enabling customers to pay for fuel, car wash, and food in one transaction. In addition, retailers are looking to POS vendors for new tech features to enable seamless self-service transactions and acceptance of multiple new payment types, including EMV acceptance, new fleet payment types, and mobile wallets. At the same time, security concerns have heightened leading fuel and convenience retailers to look for advanced technology for data security as well as fraud and loss prevention.

The fuel and convenience retail business landscape has also evolved in recent years, driving needs for modern POS capabilities. Focus has shifted from operating as a fuel station with a store/restaurant to becoming more of a destination for customers (both fleet and consumers) with a full array of integrated touch points, including fuel, food, foodservice, and services (such as car wash, EV charging), giving customers a single seamless experience throughout. But to enable seamless customer journeys, such as making mobile food order in advance and then paying for food and fuel in a single transaction at the store or getting a personalized promotion based on purchases at the store and the car wash, fuel and convenience retailers increasingly seek a unified

commerce solution for a single system that supports transactions and a unified view of data from across all touch points. In addition, fuel and convenience business needs have been changing, such as the start of a shift in focus from fossil fuels to EV charging. Retailers are seeking more flexible and configurable POS solutions to give them the agility to more easily add new services or features to meet evolving business needs and customer expectations.

At the same time, across all retail verticals we are seeing a significant shift in shopper expectations and diminished customer loyalty. Today's shoppers have greater expectations for seamless omni-channel payments/checkout and are increasingly willing to walk away from brands that do not meet the higher bar. According to IDC's recent *Global Consumer Survey*, loyalty programs and having a variety of payment options are among the most important features when selecting where to shop, and nearly 45% of shoppers globally said they were "likely" or "very likely" to walk away from a retailer that did not offer their preferred payment types or financing options (see *IDC Retail Insights: Consumer Sentiment Survey, 2024 — Findings and Implications*, IDC #EUR152449724, July 2024). Accordingly, fuel and convenience retailers are prioritizing customer loyalty (including personalized and connected loyalty programs, personalized promotions, and increased engagement with consumers before they come to the store) as well as focusing on offering a wider range of payment options to ensure they can offer customers their preferred payment types.

Amid this period of rapidly changing expectations and business conditions, fuel and convenience retailers are recognizing that the benefits a modern POS solution confers are becoming increasingly important when it comes to driving customer loyalty and achieving competitive success. Fuel and convenience retailers are looking to technology partners for solutions that can enable seamless omni-channel retailing across multiple touch points with cohesive customer experience to drive customer loyalty as well as flexible, configurable POS systems, offering seamless integrations, to enable agility to meet changing business and customer needs.

Accordingly, the key differentiators for POS providers serving fuel and convenience retailers in this market include:

- The ability to provide impactful data and AI/analytics leveraging data from all parts of the operations
- The provision of advanced omni-channel features
- Integrated security and loss prevention
- Support for multiple payment types/options
- Significant loyalty features/integrations

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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For inclusion in this study, IDC Retail Insights stipulated that a vendor should meet the following criteria:

- Has established reputation for offering POS software solutions for the fuel and convenience store segment of the retail industry and derives significant revenue from this segment.
- Offers an enterprise-ready, global POS software solution with advanced omni-channel POS functions and capabilities.
- Offers POS software solution that handles both fuel and convenience store transactions and includes specific features and functions needed for fuel and convenience retailing.
- Engages with retail POS clients in multiple countries and has a significant presence in at least one major market for its fuel and convenience store POS solutions.

## ADVICE FOR TECHNOLOGY BUYERS

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Modern POS software platforms should provide a comprehensive suite of features and services to empower retailers in today's dynamic fuel and convenience retail business landscape. IDC advises technology buyers to look for the following when selecting a vendor:

- **Prioritize flexibility/configurability:** Seek technology partners that offer highly configurable, flexible POS platform that gives retailers more control in configuring the system to meet not only their unique needs of today but also the ability to quickly evolve as new business needs or changing customer expectations dictate. Consider cloud-based POS platforms built on microservices architecture, with a full API library of relevant services, to enable more seamless customer experience for transactions in any channel.
- **Leverage unified data and AI:** Consider POS vendors that prioritize data visibility and unified data (from multiple touch points) along with AI/analytics to gain critical business insights that can help retailers improve business efficiency, reduce costs, and better drive cohesive, personalized customer experiences across the business. Seek POS solutions that can offer real-time data integration, such as for instant promotions, and integrate back-office/inventory/ERP data to gain better insights into business operations.
- **Strategize innovation:** Consider vendors with an innovation-rich road map and a consistent track record of executing previous innovations that can "future proof" your business and build competitive differentiation and customer loyalty.

Consider vendors that prioritize the use of advanced technologies, such as computer vision, biometrics, or advanced AI, to overcome retailers' most pressing challenges — for example, applying computer vision/biometrics for improved loss prevention and more seamless age verification, or employing advanced AI for personalized connected promotions to boost customer loyalty.

- **Address labor shortages:** With ongoing labor shortages and high turnover rates, consider POS platforms that offer easy UX and intuitive interfaces to make training less time consuming. Also, consider POS platforms that offer integrated self-checkout options to help speed transactions and avoid long lines/wait times for consumers.
- **Ensure payments options and flexibility:** Ensure POS vendors are committed to offering the widest range of payment types and options to drive greater consumer loyalty, considering consumers' greater expectations for preferred payment types, and increased revenue by enabling new types of customers to transact with the business. Consider POS systems that can accept the fullest range of card types (including both consumer and fleet card types), including EMV cards as well as a range of payment options that appeal to your customer base, such as contactless or mobile payment options, pay at pump, or pay by license plate.

## VENDOR SUMMARY PROFILES

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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.

### GK Software

GK Software is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide point-of-sale software platform vendors in retail fuel and convenience.

GK Software SE, founded in 1990 and headquartered in Germany, has more than 1,200 employees at locations in 10 countries. GK Software's solutions have been certified for SAP since 2000, and the two companies have a long-standing partnership, currently extending to more than 70 joint projects with SAP globally. In 2023, GK entered a strategic partnership with the Japanese technology group Fujitsu. Under the partnership, GK continues to operate independently but is also part of a wider technology and geo ecosystem. GK has customers throughout the world, with the most significant presence in Europe and North America.

GK Software introduced its fuel and convenience offering, GK Drive, on the CLOUD4RETAIL platform about five years ago and quickly gained a strong competitive presence in the segment. CLOUD4RETAIL is GK's open, flexible, and cloud-native unified commerce platform that serves all the vendor's retail segments. GK Drive is included in the same platform, so retailers benefit from cross-retail segment enhancements as well as fuel and convenience-specific capabilities. GK CLOUD4RETAIL platform is highly configurable and is built on open API-first, microservices-based architecture with over 400 REST APIs and app enablement capabilities, making it easier and less costly for retailers to add new features and services. It supports a wide variety of deployment options depending on the retailer's preferences whether on-prem or in the cloud or hybrid, is hardware/device agnostic, and offers offline resiliency. The platform is also differentiated by its extensive geo coverage with over 40 country packs available out of the box, plus others available as add-ons.

GK Drive, built on OmniPOS, GK's omni-channel POS offering, enables fuel and convenience retailers to manage all parts of their enterprise, including forecourt, store, foodservice, EV-charging, car wash and other related services on a single centralized platform. The solution includes omni-channel POS, mobile POS, self-checkout, loyalty, self-scanning, pump, digital signage, inventory and fulfillment, fraud and loss prevention and AI-driven customer engagement features including loyalty, hyper-personalization, dynamic pricing, and recommendations. GK Drive supports Connexus and IFSF interfaces and Allied and DOMS forecourt controllers as standard implementation; others can be added on demand. Fuel-specific capabilities include support for multiple payment flows (including payments at pump, kiosk, self-checkout, on app and pre-post pay), tank gauge view on POS, fleet card and commercial fueling and loyalty, promotion calculation engine, price management and price updates for pumps and signage. GK has built a strong network of relevant partners including with Comdata, creating a POS and payment solution for the company's fleet and commercial fuel customers that runs on GK, and with Altaine, which offers a scalable platform for retailers to expand and manage digital commerce programs, such as with DoorDash and Grubhub.

GK supports a wide range of payment options, including all major payment types and additional options such as crypto, gift card, and check, as well as a variety of tenders such as WIC/eWIC and lunch vouchers. GK Software provides extensive support for fleet payments, including Comdata, WEX, WEX OTR, Mudflap, MultiService, and Relay, and is currently working on providing support for additional fleet payment types. In addition, in North America, GK offers TransAction+ Payments, which is pre-integrated with CLOUD4RETAIL and supports a wide variety of payment types and processors. New features and capabilities on GK Drive's road map include additional mobile app pay-at-pump options and enhanced order from pump capabilities, giving customers the ability to order prepared food and goods from the convenience store for in-store or

curbside pickup. Additional road map items for the CLOUD4RETAIL platform include self-service computer vision, with multiple item recognition and enhancements to fraud prevention and hyper-personalized loyalty applications.

## Strengths

- **Highly configurable and flexible platform.** GK's CLOUD4RETAIL platform is a true differentiator for the company's POS solution, giving retailers the flexibility to configure the solution in the way that works well for their business and enabling agility making it faster and easier for retailers to innovate and respond to changing fuel and convenience customer expectations or business environment. The cloud-native platform provides a full portfolio of relevant services for retail, is flexible to meet varying customer preferences, and is resilient, including offline capabilities. The open, API-first architecture, including over 400 REST APIs, enables GK CLOUD4RETAIL services to be used by other channels and applications. The platform provides retailers with the capabilities to differentiate their brand and to more easily innovate and grow.
- **Strong fuel partner ecosystem.** GK has developed a strong ecosystem of partners that are highly relevant for optimizing fuel and convenience retailing. In addition, GK has worked with key partners for value-added collaborations, such as Abacus for integrated lottery sales at POS, payment solution for Comdata fleet and commercial fuel customers, and with a platform that enables retailers to easily add and manage digital food ordering and delivery integrations.
- **Unified data and AI-fueled insights.** GK's platform enables data-driven retailing through its data integration capabilities and its support for formatting and feeding data, such as transaction and loyalty data, between systems (including external systems through APIs) for more seamless operations and to provide a base for intelligent insights. AI capabilities are built into the platform, giving retailers the abilities to apply AI to integrated data sets to improve operations and customer engagement, such as with dynamic pricing and hyper-personalization.
- **Innovation.** GK is committed to innovation and invests in its own R&D projects, works with partners on innovation initiatives, and co-innovates with customers as well. Recent initiatives include improved loss prevention/fraud detection using analytics, computer vision, and sensors; improved checkout with computer vision-enabled item recognition and RFID-enabled self-checkout; and carbon footprint calculation and compensation at checkout.

## Challenges

- Though GK has a well-established offering for grocery and convenience retail, the vendor does not have a long breadth of experience in the fuel segment.



However, GK has built strong partnerships with a range of relevant fuel partners and shown commitment to maintaining fuel industry standards and certification.

- GK solution is better suited for tier 1 fuel and convenience retailers and may not be the right choice for midsize or smaller retailers in this space.

## APPENDIX

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### 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 estimated retail revenue for the 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

This IDC study represents an assessment of worldwide point-of-sale (POS) software platform vendors with offerings for fuel and convenience retailers. This research is a quantitative and qualitative analysis of the features, functionalities, and strategic road maps that explain the success of the major point-of-sale software providers in the fuel and convenience segment, with a particular focus on omni-channel features and capabilities relevant to this segment. POS software is related to the management of transactions and sales in retail, including sales reporting, sales indicators, exception reporting, and cash accounting. Many modern POS solutions include omni-channel capabilities and related features including loyalty and fulfillment. Given the fragmentation of the POS solution market, this study focused on the most prominent POS solution vendors in the market, covering global vendors with significant market presence addressing omni-channel commerce with enterprise-grade POS solutions or ones that are emerging very quickly.

## LEARN MORE

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### Related Research

- *Empowering Checkout Experiences: A Review of Point-of-Sale Innovations in Asia/Pacific Retail Landscape* (IDC #AP50981324, December 2024)
- *IDC Retail Insights' Global Retail Survey, 2024: Findings and Implications* (IDC #US51558623, November 2024)
- *How Shoppers' Evolving Embrace of Self-Service Technologies Impacts Retail, 2024* (IDC #US52663824, October 2024)
- *What Are the Most Preferred Contactless Payment Types by Shopper Age?* (IDC #US52512224, August 2024)
- *IDC MarketScape: Worldwide Retail Omni-Channel Payment Platform Software Providers 2024 Vendor Assessment* (IDC #US51168024, June 2024)
- *IDC Market Glance: Omni-Channel Retail POS and Payments Software, 2Q24* (IDC #US49334122, May 2024)
- *Market Presentation: A Super Platform for the Modern, Omni-Channel Store* (IDC #US52025324, April 2024)
- *POS and Payments: Hot Topics and Tech Trends from NRF 2024* (IDC #US51909424, March 2024)
- *IDC MarketScape: Worldwide Point-of-Sale Software in Midsize Apparel and Softlines Retail 2023 Vendor Assessment* (IDC #US48079822, March 2023)

- *IDC MarketScape: Worldwide Point-of-Sale Software for Large Apparel and Softlines Retail 2023 Vendor Assessment* (IDC #US48621522, March 2023)

## **Synopsis**

This IDC study examines the key strategies and capabilities of POS software platform vendors in retail fuel and convenience. It evaluates vendors' strengths as omni-channel partners and capabilities in integration and partnerships, data and AI/analytics, customer engagement, extensibility, and scalability. A key component of the evaluation is how buyers perceive the benefits of the POS software in meeting the quickly evolving needs in fuel and convenience retail.

"Tremendous changes in fuel and convenience retail in recent years amid evolving technology needs, changing business models, and heightened customer expectations along with waning loyalty makes it more essential to find POS software partners that can deliver next-gen solutions needed for success in today's environment," says Margot Juros, research director, Retail Technology Strategies at IDC. "Retailers are looking to modern POS platforms that enable seamless omni-channel, personalization, agility, and data-driven insights to drive customer loyalty and greater profitability."

## ABOUT IDC

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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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