

informationspan

Insight Services Report: Business Intelligence

November 2008

Executive Summary

This report surveys Insight Services which cover Business Intelligence. We review the providers with known coverage in this area, from the InformationSpan database of over 400 providers, using the InformationSpan industry structure model for classification: global generalists; global specialists; local generalists; and niche providers.

Recent significant consolidation in the BI marketplace makes authoritative advice essential in this area. Reports prior to mid 2007 are likely to be very dated.

There is extensive service coverage of this important area; some generalist providers define it as a topic at their highest level. There are well established specialists, and an innovative approach from the Corporate Executive Board is represented through their IT Toolbox.

Topic definition

Business Intelligence (BI) includes applications, infrastructure and analytical methodologies that perform data analysis, based on business data and delivering management information on which business decisions can be based. Active BI in a business requires significant IT investment in infrastructure for data management (corporate databases, data warehousing) and software systems for analytics, data mining, reporting and presentation. A company's BI strategy will encompass the reports required by business managers, extraction and possibly transformation of the original source data in order to create them, and significant infrastructure and software development resources.

Related topics: Online Analytical Processing (OLAP); Data Warehousing (DW); Analytics; Performance Management,

Providers – global generalists (majors)

Included: Forrester Research; Gartner

Forrester Research

ANALYSIS: BI is significant for Forrester, but not highest-profile.

The Enterprise BI Platforms Wave was revised in Jul 2008 (12 vendors, including SAP and Business Objects separately). The Wave on Business Performance Solutions (10 vendors) was published in Oct 2007. There are topical reports on the marketplace developments.

TEAM: Forrester have just recruited James Kobelius from Burton, to augment an already good team. Search on Kobelius or Boris Evelson.

VENDORS/TOOLS: Actuate, Applix, Clarity Systems, Cognos (IBM), Infor, Information Builders, Longview Solutions Microsoft, MicroStrategy, Oracle, Panorama Software, QlikTech, Business Objects (SAP), SAP, SAS Institute, TIBCO Spotfire.

ACCESS: Forrester subscription; individual reports can be purchased; attend a Forrester Forum or web conference.

SELECTED DOCUMENTS: *The Forrester Wave: Business Performance Solutions, Q4 2007* (Oct 2007); *The Forrester Wave: Enterprise Business Intelligence Platforms, Q3 2008*

(Jul 2008); Web conference "Next-Generation Business Intelligence" (10 Nov 2008) will be available for replay

WEBSITE: <http://www.forrester.com/>

Gartner

ANALYSIS: Gartner has a major focus on BI. It is included in their slate of Summit events. The Summit web pages are a good gateway to review what they have.

Magic Quadrant (MQ) for BI Platforms was updated in Feb 2008 (14 vendors). The MQ for BI Services (i.e. outsourcing) includes Performance Management Services as well as specifically BI providers.

TEAM: Coverage by up to 20 analysts including Andreas Bitterer, Nikos Drakos and Kurt Schlegel

VENDORS/TOOLS (BI Platforms): Microsoft, Cognos, Business Objects, Oracle, MicroStrategy, SAS, SAP, Information Builders, QlikTech, Actuate, arcplan, Board International, Panorama Software, Tibco Spotfire.

ACCESS: Gartner subscription; individual reports can be purchased; attend the Gartner BI Summit, Symposium, or web conference. Gartner for IT Leaders has a specific service for BI & Information Management

SELECTED DOCUMENTS: *Magic Quadrant for BI Platforms* (Feb 2008, available via the MicroStrategy website); *Magic Quadrant for Business Intelligence and Performance Management Services, North America* (May

2008); *Roundup of Business Intelligence and Information Management Research, 3Q08* (Nov 2008)

WEBSITE: <http://www.gartner.com/>

Providers – global generalists (second tier)

Included: Aberdeen Group; IDC

Aberdeen Group

ANALYSIS: cover BI extensively with benchmark surveys and technology information.

There is more focus on use of BI than on technology and vendors. They offer marketplace alerts on vendors, but focus is on enterprise strategy; no strategic reports on the marketplace so far as is visible

TEAM: not visible on the website

VENDORS/TOOLS: no information visible

ACCESS: Aberdeen claim their VAULT programme is relatively inexpensive. Wide range of complimentary research made available through guest access, presented through Shockwave (cannot be downloaded)

SELECTED DOCUMENTS: *The Expansion and Contraction of Business Intelligence* (Jan 2008); *Data Management for Business Intelligence* (Mar 2008); *One Version of the Truth 2.0* (Sep 2008, part sponsored)

WEBSITE: <http://www.aberdeen.com/>

Providers – global specialists

Included: AMR Research; BI Survey; BI Tool Survey; IT Toolbox Business Intelligence Knowledge Base; OLAP Report.

AMR Research

ANALYSIS: AMR's primary business is major enterprise applications. Hence they are interested in BI as it relates to their primary area, but see BI as a component of the wider field of Enterprise Performance Management.

A major spending report was published in May 2008. The SAP Peer Forum covers BI. There is a strong focus on future developments

TEAM: three analysts appear in the publication lists, including the well respected John Hagerty. AMR don't provide a list of analysts by coverage area.

VENDORS/TOOLS: vendors listed in the Enterprise Performance Management overview include Acorn Systems; Activestrategy; Actuate; Approva; Clarity Systems; Longview Solutions (Exact); Cognos (IBM); Infor; Informatica; Microsoft; OCO; Open Pages; Hyperion (Oracle); Oversight Systems; Paisley; Pentaho; Business Objects (SAP); SAS; Silvon; Teradata.

SELECTED DOCUMENTS: *The Business Intelligence and Performance Management Spending Report, 2008-2009*:

IDC

ANALYSIS: Business Intelligence and Analytics is an IDC top level research Market Area covering services, software and infrastructure. There are BI events linked to specific market segments (e.g. healthcare).

TEAM: 7 named analysts

VENDORS/TOOLS: Business Objects; SAS; Cognos; Oracle; Microsoft; SPSS; Visual Numerics; Teradata; "Other".

ACCESS: Look on the website to see which subscription services include this coverage within their IT practice. Ask whether access is provided through any IDC Insights service your enterprise may subscribe to on the business side.

SELECTED DOCUMENTS: *Worldwide Business Intelligence Tools 2008–2012 Forecast: Limited Impact of Short-Term Economic Uncertainty* (Mar 2008); *Worldwide Data Warehouse Platform Software 2007 Vendor Shares* (Aug 2008)

WEBSITE: <http://www.idc.com/>

Inside the \$57.1B Market (May 2008); *Enterprise Performance Management Market Update for May 2008* (May 2008)

WEBSITE: <http://www.amrresearch.com/>

BI Survey

ANALYSIS: Specialist single-issue annual publication. Based on survey of user organisations and sponsored: covers usage of the technology, and relates this to capabilities of products surveyed.

TEAM: Nigel Pendse

VENDORS/TOOLS: detailed product-level analysis for MicroStrategy; Microsoft; Applix (now IBM/Cognos); SAP; Business Objects; Infor; Board; Panorama; Information Builders; Cubeware; Hyperion; Crystal Reports; arcplan. 14 further vendors included in aggregate results.

ACCESS: The BI Survey is a yearly publication and must be purchased.

WEBSITE: <http://www.bi-survey.com/>

BI Tool Survey

ANALYSIS: Single-issue service from Netherlands-based consultancy Pasionned. Based on lab tests of tools submitted by the vendors. Placed in the context of BI Strategy.

VENDORS/TOOLS: Oracle; SAP; Business Objects; SAS; Applix; Actuate; QlikTech; MicroStrategy; Hyperion; Actuate; Cognos (IBM); Information Builders; IBM; Microsoft; EFM Software

ACCESS: contents and vendor list available online, with sufficient information to judge coverage but no substantive data. Report is for purchase.

WEBSITE: <http://www.businessintelligencetoolbox.com/>

IT Toolbox: Business Intelligence Knowledge Base

ANALYSIS: This is a community service within the IT Toolbox suite of services. It provides discussion groups, white papers, and a Wiki.

Toolbox is a division of the Corporate Executive Board, therefore having the backing of a major provider using the “researched sharing” model. There is a related Data Warehouse presence.

TEAM: contributions are from service members, and vendors post information about their products.

VENDORS/TOOLS: in principle will cover everything of interest to its community. Have not surveyed the content.

ACCESS: Free. Access to “Premium” content requires sign-up but is not chargeable; however, conditions of use

Providers – local generalists

Included: Butler Group; Ventana Research

Butler Group (UK)

ANALYSIS: Butler Group is a general IT insight provider. There is no clear focus on BI in the research, but the company has a BI Symposium. (most recently held in Oct 2008 but no information on Butler’s website).

Coverage appears to be limited and spasmodic. The last major report is two and a half years old.

TEAM: no information visible

ACCESS: very little free content, but major reports are regularly made available on appraisal.

SELECTED DOCUMENTS: *Operational BI* (Feb 2007); *Business Intelligence – A Strategic Approach to Extending and Standardising the Use of BI* (Mar 2006)

Providers – local specialists and niche services

There are no identified providers in these categories

include receiving mailings from the information’s provider

WEBSITE: <http://businessintelligence.ittoolbox.com/>

OLAP Report

ANALYSIS: Specific single-issue service.

The Report is no longer a single timed publication, but a continually updated service with over 100 sections. Its intention is to provide qualitative, expert assessment of products and technologies across the spectrum of current products including Excel add-ins (20 vendors) plus out of date products (16 additional vendors, reports not being updated).

It is not clear if there is any comparison of features or capabilities.

TEAM: Nigel Pendse

MARKETPLACE

VENDORS/TOOLS: Business Objects; Applix; arcplan; Cartesis; CIP Executive Suite; Cognos; Hyperion (Oracle); Information Builders; IBM; Microsoft; MicroStrategy; Oracle; OutlookSoft; Panorama; QlikTech; SAP; Tableau; Targit Analysis; Temtec; and at least 15 Excel add-in products.

ACCESS: Subscription to website, continually updated. Individual product assessments can also be purchased. Content is not visible without subscription. Some elements visible through the RSS feed page.

Users may also need the *BI Survey* for the practical user side of the story.

WEBSITE: <http://www.olapreport.com/>

WEBSITE: <http://www.butlergroup.com/>

Ventana Research (US)

EMPHASIS: Ventana cover performance management and include BI within their IT Performance segment.

A small company, based in California, Ventana publishes through a range of media channels; it appears that many reports are vendor-sponsored.

From report titles only, it appears that research focuses on corporate strategy rather than vendors and tools.

ACCESS: no free content

WEBSITE: <http://www.ventanaresearch.com/>

Recommendations

1. After recent consolidation, most formerly independent vendors are now owned by major corporations (IBM, Oracle, SAP). Any marketplace report prior to mid 2007 will be significantly outdated.
2. If your enterprise has a subscription to any global service, especially *Gartner*, *Forrester* or *IDC*, explore access to those resources (which will depend on the contract). There may be alternative access routes to content if you do not have subscriber access; but as always it is access to the analysts which proves the real value of analyst-led services.
3. In the absence of a subscription, if your focus is on technology selection, consider the *BI Tool Survey*. It's relatively cheap and I like the approach promoted on the website.
4. *The OLAP Report* and *BI Survey* together offer the fullest specialist coverage, valuable if you are likely to look outside the major providers. An alternative is to buy individual reports for vendors you are really interested in. I infer that if you buy *The OLAP Report* you will find frequent references to "the data are in the *BI Survey*". That will certainly be true for implementation and user information, if I've understood it correctly. So don't underestimate the cost.
5. The *Gartner Magic Quadrant* report is cheaper than the *OLAP Report* and may cover the content in adequate depth. A *Gartner for IT Leaders (GITL)* BI seat is expensive relative to the reports, even on the read-only basis: but GITL provides a wealth of resources beyond the research reports and can be well worthwhile, especially in the start-up phase of a BI service. Consider attending *Gartner's BI Summit* for concentrated information and access to analysts – and probably some analyst follow-up for goodwill.
6. I expect enhanced coverage from *Forrester* with the combination of *Kobelius* and *Evelson*. *Forrester's Wave* has the advantage that the weightings in the model can be customised to reflect the user's priorities. *AMR* is a good option if its primary focus on manufacturing matches your enterprise needs.
7. Finally, if the community approach is viable for you, consider signing up for the *IT Toolbox Business Intelligence Knowledge Base*. This is contributory, so the cost is in your own time rather than cash outlay, and a lot of the material on view is contributed by vendors, but questions can be asked in the discussion groups. The backing of the *Corporate Executive Board* (parent of the *CIO Executive Board* and other services) ensures reputability.

Document history

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This is version 2 of November 2008

Please send comments on this report to Tony Law at InformationSpan: tony@informationspan.com

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About InformationSpan

This document is a research report from InformationSpan

Based in the south of England, InformationSpan specialises in reviewing the insight services sector from the point of view of an IT user organisation rather than taking the vendor's Analyst Relations view. We focus on those aspects which make a service useful and usable from the enterprise perspective, and on assisting users to select and manage the right services to deliver value through better IT decision making.

InformationSpan understands the structure of the service marketplace, and has a database of over 400 provider firms from which this research is drawn. See more about us at <http://www.informationspan.com/>. To engage with us, send email to tony@informationspan.com or telephone +44 (0)1273 479031.

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