



Pierre Audoin Consultants

Business Intelligence

Belux market

16/03/2010

Methodology

- For this survey, PAC mixed several sources so as to provide a consistent report, including:
 - PAC's expertise :
 - Belux Software and IT Services market knowledge (market report for 10 years).
 - Expertise in market trends analysis, market/players sizing.
 - PAC's database (SITSI ®):
 - Geographic : Belgium, Luxembourg, Western Europe
 - Horizontal : Business Intelligence in Western Europe (France, Germany, etc.)
 - Belgian market players interviews :
 - SAP, Oracle, Microsoft, Informatica, Microstrategy, Information Builders, Talend
 - Knowledge Networks' expertise:
 - Our Belgian partner provided us with large insights about current BI deals in the local market

Market Segmentation - Horizontal

➤ The Business Intelligence market segmentation used in this report is based on SAS segmentation and its four following offerings, that we consider as “Horizontal Segments”:

➤ Data integration

Spectrum of enterprise data integration needs with enterprise connectivity, data access, integrated data quality and an interactive data integration development environment

➤ Analytics

Software which allows reactive and proactive decision making, including statistical analysis, forecasting

➤ Reporting

Standard and specific reports, OLAP and alerts

➤ Business Solutions

Packaged Business Intelligence Software focusing on specific issues horizontal (performance, customer intelligence, risk, financial, compliance management) and vertical solutions (e.g. profitability, marketing mix, network utilization rate, etc)



Market Segmentation - Vertical & Geographic

➤ The Business Intelligence market segmentation used in this report is based on SAS segmentation and its three verticals, that we consider as “Vertical Segments”:

➤ **Finance**

Banking and Insurance

➤ **Public Sector**

Central and Local Administrations, European Commission, Healthcare

➤ **Commercial**

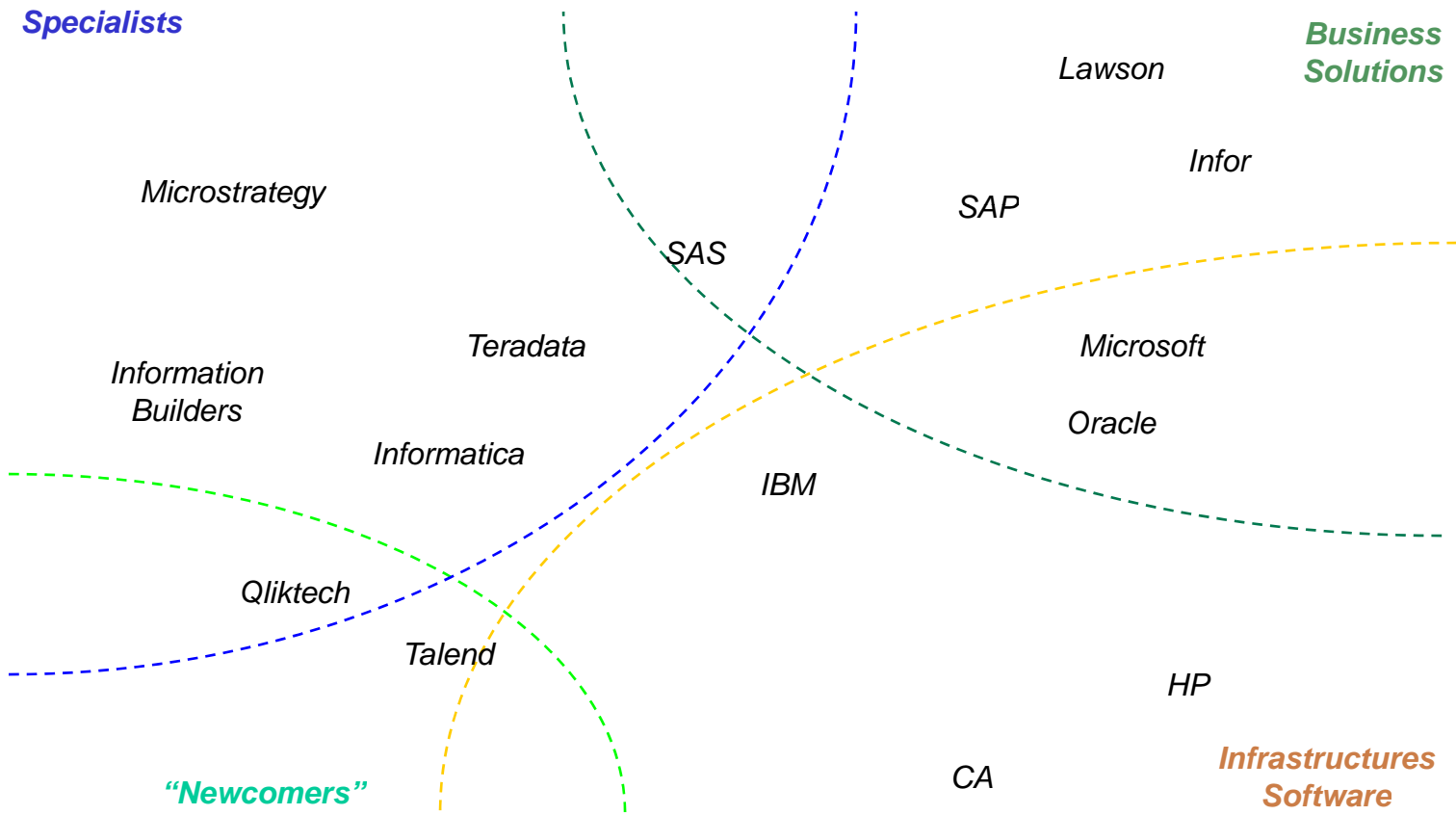
Manufacturing, Telecom, Utilities, Services, Transports, Retail

➤ Geographic : this report covers the Belux region (Belgium and Luxembourg).

Market Characteristics - 2009

- Market consolidation and post-merger issues : SAP/BO, IBM/Cognos/SPSS, Oracle/Hyperion
- Business Intelligence software market experiences a growth above the Belgian software market, that was close to -2% in 2009.
- The main drivers remains compliance, performance & risk management, data quality.
- New players with high growth rates (Qliktech and Talend), especially within the SMBs.
- Business model transformation toward “SaaS and Cloud Computing ”
- Within the large accounts, Business Intelligence is now a part of Information Management (including ECM,...)
- Business Intelligence is steadily covering the whole enterprise functions (RH, Purchase,...)
- The market growth slowed due to the economic context with several frozen projects.

Strategic Groups

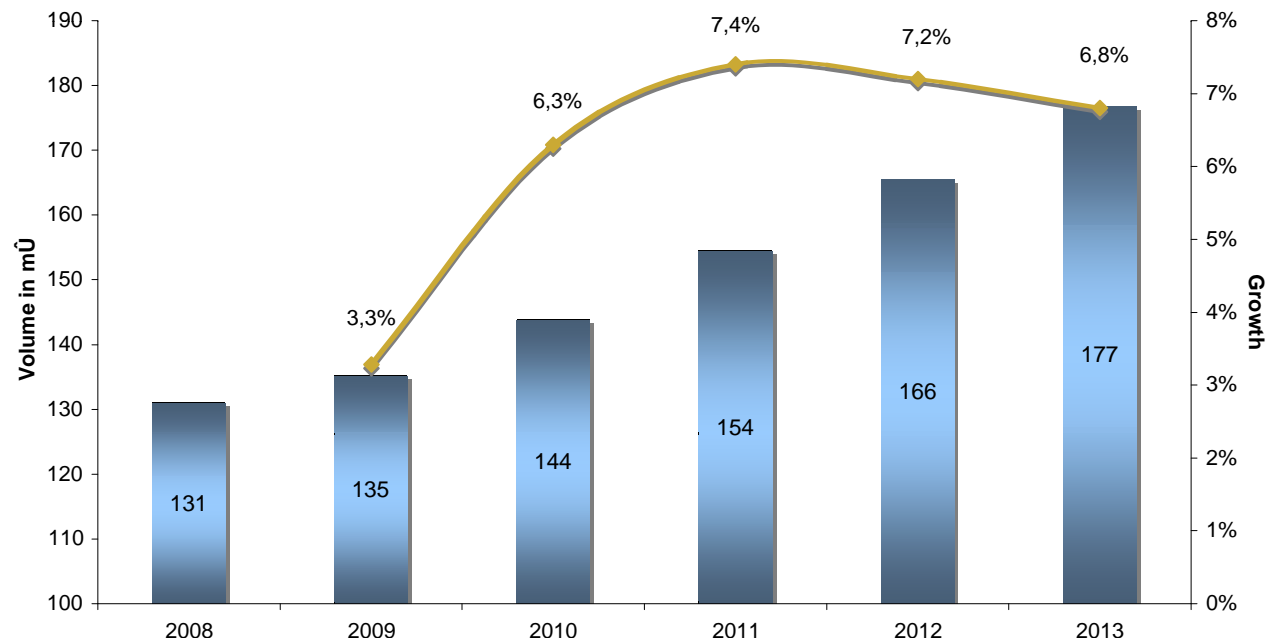


Business Intelligence software market - volume and growth (2008/2013)

Belgium- Business Intelligence market volume						
in m€	2008	2009	2010	2011	2012	2013
Total Products (licence+maintenance)	131.0	135.3	143.8	154.5	165.6	176.8

08/09	09/10	10/11	11/12	12/13	TCAM 09/13
3.3%	6.3%	7.4%	7.2%	6.8%	6.9%

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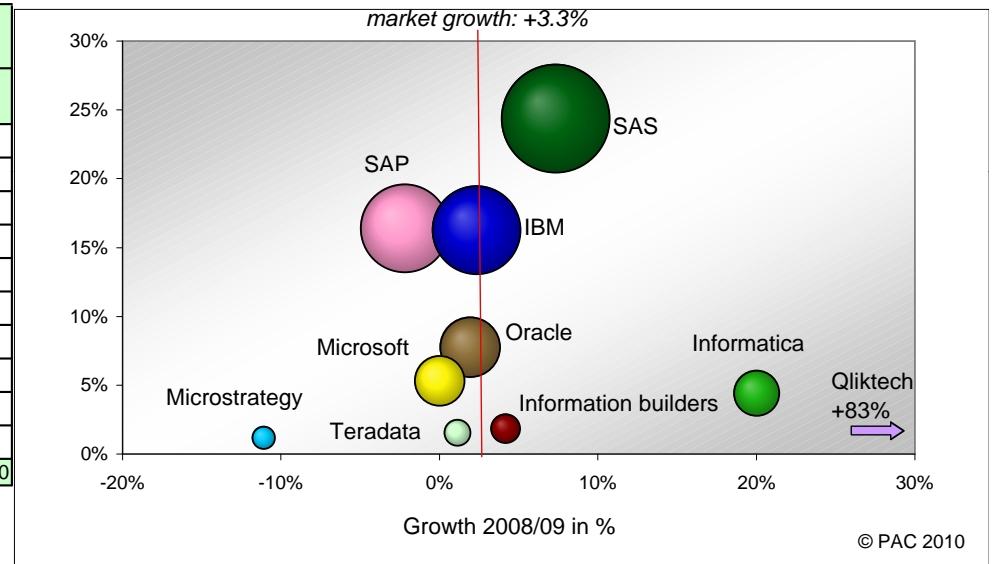
Business Intelligence software market - Top 10

Belgium - Leading Suppliers ranked by Software* Revenue (in million EUR)				
Rank	Company	2009	Growth 2008/09	Market Share 09
1	SAS	33.0		24.4%
2	SAP	22.2		16.4%
3	IBM	22.0		16.3%
4	Oracle	10.5		7.8%
5	Microsoft	7.2		5.3%
6	Informatica	6.0		4.4%
7	Information Builders	2.5		1.8%
8	Teradata	2.1		1.6%
9	Microstrategy	1.6		1.2%
10	Qliktech	1.1		0.8%

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*Licence+Maintenance

- > market growth
- = market growth (modulo +-1%)
- < market growth

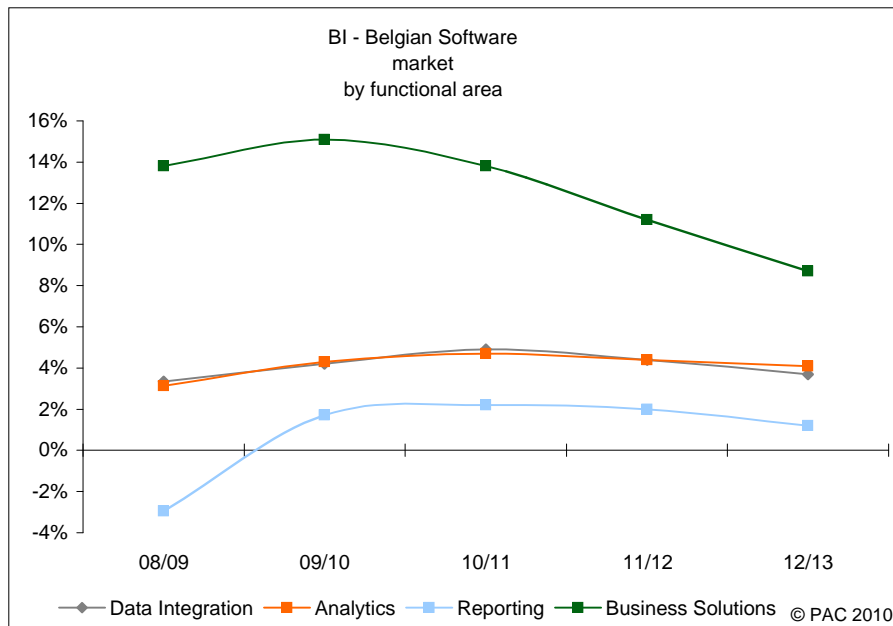


Market volume and growth by “Horizontal”

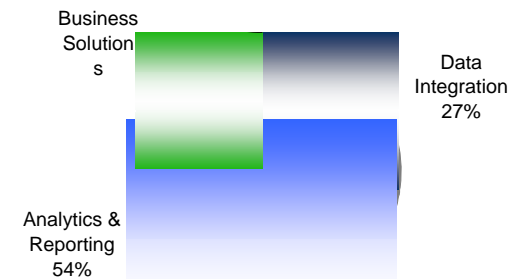
Belgium- Business Intelligence market volume						
in m€	2008	2009	2010	2011	2012	2013
Total Products (licence+maintenance)	131.0	135.3	143.8	154.5	165.6	176.6
Data Integration	36.0	37.2	39.2	42.2	45.4	48.6
Analytics & Reporting	72.0	72.1	74.8	78.4	82.0	85.9
<i>Dont Analytics</i>	33.0	34.1	35.8	37.8	39.8	41.8
<i>Dont Reporting</i>	39.0	38.0	39.0	40.5	42.3	44.1
Business Solutions	23.0	26.0	29.7	33.9	38.1	42.3

08/09	09/10	10/11	11/12	12/13	TCAM 09/13
3.3%	6.3%	7.4%	7.2%	6.8%	6.9%
3.3%	5.4%	7.7%	7.4%	7.2%	6.9%
0.1%	3.8%	4.7%	4.7%	4.6%	4.5%
3.3%	5.1%	5.5%	5.2%	5.1%	5.2%
-2.6%	2.6%	4.0%	4.3%	4.2%	3.8%
13.0%	14.4%	13.9%	12.6%	10.8%	12.9%

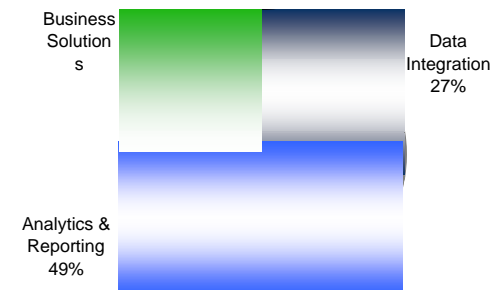
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Market structure in 2009



Market structure in 2013



Rankings by “Horizontal”

Company	Software* Revenue	Growth 2008/09	Data Integration	Analytics	Reporting	Business Solutions
SAS	33,0	Green	Leader	Leader	Leader	Top 3
SAP	22.2	Red	Top 5	Top 3	Top 3	Leader
IBM	22,0	Yellow	Top 3	Top 3	Top 3	Top 5
Oracle	10.5	Yellow	Top 5	Top 5	Top 5	Top 3
Microsoft	7.2	Red		Top 5	Top 5	Top 5
Informatica	6,0	Green	Top 3			
Information Builders	2.5	Yellow				
Teradata	2.1	Red				
Microstrategy	1.6	Red				
Qliktech	1.1	Green				

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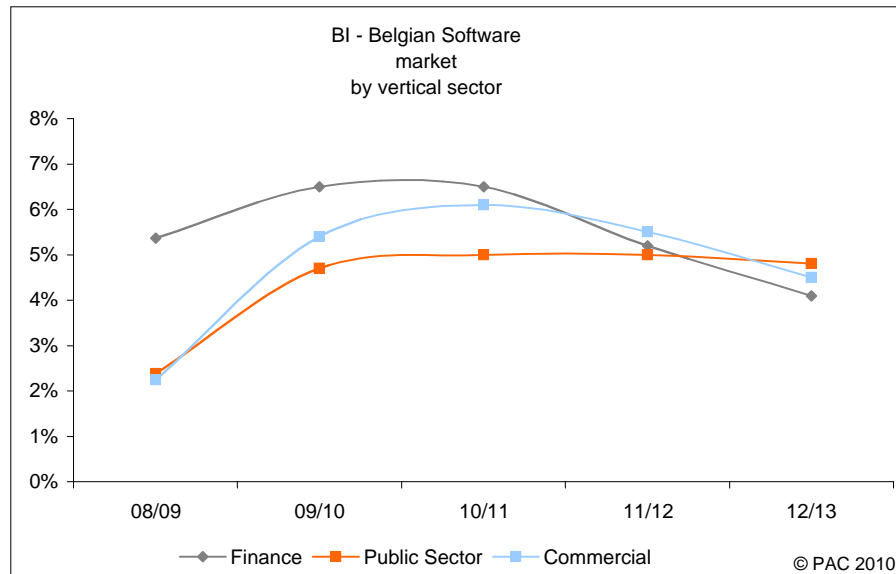
Green	> market growth
Yellow	= market growth (modulo +/-1%)
Red	< market growth

Market volume and growth by “Verticals”

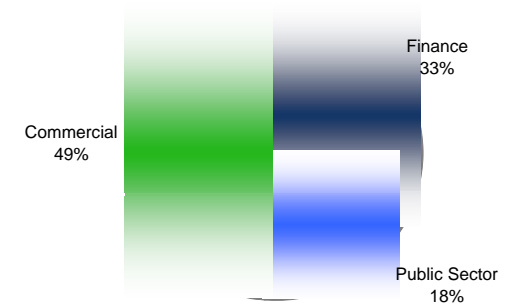
Belgium- Business Intelligence market volume						
in m€	2008	2009	2010	2011	2012	2013
Total Products (licence+maintenance)	131.0	135.3	143.8	154.5	165.6	176.8
Finance	43.1	45.3	48.2	51.8	55.3	58.7
Public Sector	23.2	23.8	24.9	26.3	28.1	30.2
Commercial	64.7	66.2	70.6	76.4	82.2	87.9

08/09	09/10	10/11	11/12	12/13	TCAM 09/13
3.3%	6.3%	7.4%	7.2%	6.8%	6.9%
5.1%	6.5%	7.3%	6.9%	6.1%	6.7%
2.6%	4.7%	5.7%	6.5%	7.7%	6.1%
2.3%	6.7%	8.1%	7.7%	6.9%	7.3%

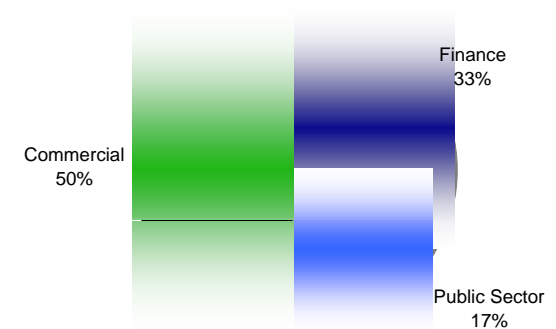
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Market structure in 2009



Market structure in 2013






Rankings by “Verticals”

Company	Software* Revenue	Growth 2008/09	Finance	Public Sector	Commercial
SAS	33,0	Green	Leader	Leader	Top 3
SAP	22.2	Red	Top 3	Top 3	Leader
IBM	22,0	Yellow	Top 3	Top 5	Top 3
Oracle	10.5	Yellow	Top 5	Top 3	Top 5
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Qliktech	1.1	Green			

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