

PRODUCT COMPARISON

Info-Tech Advisor Premium - Compare



About this research note:

Product Comparison notes provide a detailed, head-to-head, analytical comparison of products in a given market in order to simplify the selection process.

Vendor Landscape: Business Intelligence Solutions

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Selecting a Business Intelligence (BI) solution can be a complex task. Ongoing market consolidation and an evolving technology landscape only add to the confusion. Use this vendor landscape to select the BI solution best suited for the organization based on the completeness of the solution, its features and functionality, affordability, usability, and company strength.

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Executive Summary

Buying a Business Intelligence (BI) solution can be complicated. BI products are notoriously complex, and the variety in vendor offerings and packaging available makes straightforward comparisons difficult. Market consolidation and an evolving technology landscape also raises concerns about product roadmaps.

This vendor landscape evaluates and compares the following BI vendors:

- IBM Cognos.
- Microsoft.
- MicroStrategy.
- Oracle Hyperion.
- QlikTech.
- SAP Business Objects.
- SAS.
- Information Builders.

Use this vendor landscape to select the BI solution best suited for the organization based on the completeness of the solution, its features and functionality, affordability, usability, and company strength.



Market Overview

Ongoing consolidation in the BI market means that there are fewer differentiating features for clients to worry about, turning cost considerations into a critical differentiator. The market forces shaping the BI landscape are still largely driven by vendor push rather than consumer demand. However, the BI consumer base is more educated than it has ever been and discerning customers will soon be a much stronger force in shaping the BI market.

There are five major market trends occurring in the BI space:

1. **Market consolidation through acquisitions.** Oracle acquired Hyperion in 2007. IBM acquired Cognos, and SAP acquired Business Objects in 2008. Many existing customers of these acquired companies experience an uncomfortable transition to the new customer support models with the mega-vendors.

The most noteworthy acquisition story in 2009 is IBM/Cognos' bid to purchase SPSS (the statistical analysis software company). IBM is now in a position to leverage advanced analytics as part of their BI stack, in order to compete against industry stalwart SAS. In early 2009, IBM also announced it would provide new business services and consulting for organizations looking to leverage business performance management (BPM) and advanced analytics. IBM recognizes the need (and profitability) of external consulting services to support organizations unable to make the transition to BPM and advanced analytics on their own. Advanced analysis is the natural next step for organizations that have been effectively leveraging BI up until now. IBM has also recently (2010) acquired Initiate Systems, a data management company, as a means of getting greater market presence in the healthcare sector.

2. **BI for the masses.** Most major vendors are preaching the virtues of wider BI deployments at the department level. This is primarily a marketing move aimed at gaining a greater footprint (and larger licensing volumes) within organizations. Vendors have developed more user friendly interfaces and better office integration to aid in the push for departmental BI. Vendors successful at departmental deployments, like QlikTech's QlikView, with its rich visual data discovery, are facing stiffer competition. While organizations can, in principle, benefit from wider BI adoption, we believe that enterprise wide BI is still at least five years away from being realized.
3. **Push towards on-demand BI.** The recession has taken its toll on budgets, and IT managers are still looking for cost-savings. On-demand offerings with utility based licensing have piqued the interest of a growing number of consumers. Hosted solutions are also appealing to mid-market organizations that don't have the technical capabilities and/or the necessary infrastructure to host an on premise solution but are interested in BI. This growing interest in the BI market for lower cost solutions has led to an increase in software-as-a-service BI offerings by the mega-vendors (IBM/Cognos, SAP/Business Objects, SAS, and Oracle/Hyperion).



4. **In-Memory analysis peaking.** Organizations with performance needs are looking for faster analysis, and quicker time to deployment. However, the competition is heating up for vendors like MicroStrategy and QlickTech, as most of the mega-vendors now offer in-memory solutions. This trend makes customers the winner. Vendors that tout in-memory as their only differentiator, and those with poor roadmaps, will be the losers.
5. **Dashboarding capabilities.** Dashboards are essential for communicating business data in an effective way. They provide rich graphical representation of critical metrics, focused around key user groups. Improvements to dashboarding capabilities (such as MicroStrategy or Sharepoint 2010) make data easier to manipulate and more desirable to consume for business users.

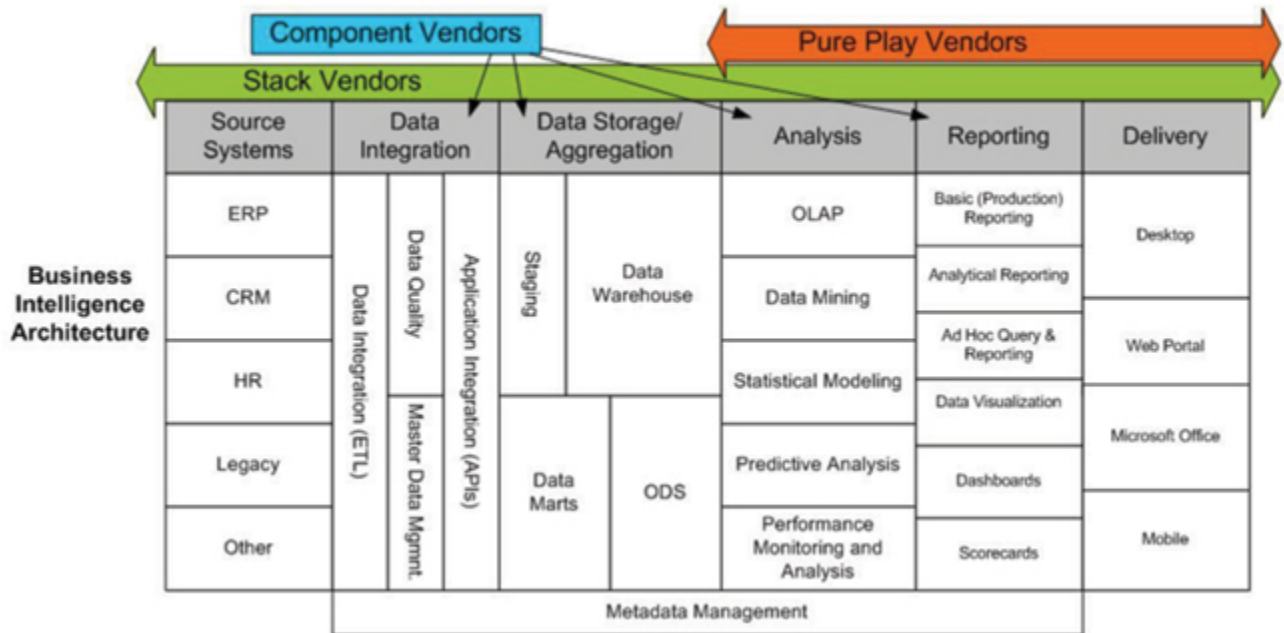
Stack Vendors, Pure-Play Vendors, Component Vendors, oh my!?

Ongoing market consolidation has caused confusion over the functionality available from existing products and concern over the development of product roadmaps. Innovation is a good thing – but it can create an uncomfortable sense of instability.

The BI market offers a myriad of vendors to choose from, many of which provide similar functional capabilities. There is no consistent approach to tool packaging. This makes product comparisons difficult to come by. For example, to the uninitiated it looks like Oracle has 20 different BI products.

Figure 1. A Vendor Agnostic View of BI Architecture

Source: Info-Tech Research Group



To simplify the selection process, start by understanding how BI products map onto the BI architecture:

- **Stack Vendors:** Provide comprehensive BI solutions that target the entire BI architecture.
- **Pure Play Vendors:** Primarily focus on providing analytical and reporting solutions.
- **Component Vendors:** Point solutions for a single component of the BI architecture (e.g. analysis).

Please see Appendix A for a complete list of BI vendors and how each of them fits into the Stack, Pure Play, or Component vendor categories.

Process Map

This vendor landscape reviews eight of the most popular business intelligence solutions available today. The categories are defined as follows:

- **Champions.** These vendors have significant presence in the market. They invest regularly in research and development to be trend setters for the rest of the industry. Leaders offer excellent value-for-performance. This can mean the strongest features, highest quality support, most competitive pricing – or a combination of these.
- **Contenders.** These vendors may or may not compete on price. The product offers good performance, and is supported with regular updates. Competitors have a more limited market



presence, but have the potential to become future industry leaders if they fix the missing links in their value chain.

- **Emerging Player.** The contenders and champions of today were the emerging stars of yesterday. These are less-established vendors who are starting to gain a foothold in the marketplace. These vendors are still considered "best-of-breed" and thus are included in the vendor landscape.
- **Old Guard.** These vendors are usually incumbents who no longer offer the best value. Customers may keep buying from these vendors due to an existent installed base, unwilling to evaluate newer options. The market presence of supporters is in decline.
- **Vanguard.** These vendors service niche segments of the market. They have identified certain core strengths, or product innovations, that act as their competitive advantage. These vendors are poised to emerge as competitors or leaders.

Note that these are *not* rankings, but rather a commentary on each vendor's strengths and weaknesses and what they bring to the market. Also, a vendor landscape does not necessarily include all categories.

Key Selection Criteria

To determine the ratings for vendors in the business intelligence industry, Info-Tech compared vendor performance in these five areas:

Key Criteria for Vendor Selection	
Completeness of Solution	Metadata management, cross-functional integration (API/SDKs), breadth of support platforms, information integration and delivery, deployment options, and reliability.
Features & Functionality	Analytics, scorecards and dashboards, scalability, Office integration.
Affordability	Licensing and support costs. A higher rating means a less expensive product.
Usability	Ease-of-use for end users, ease-of-implementation and support for IT.
Company Strength	Product roadmap/vision, vendor reputation/stability, and quality of vendor support.



Product List

The following vendors and their products were evaluated in this landscape:

Vendor	Product
IBM	Cognos 8 Business Intelligence Version 8.4
Information Builders	Information Builders WebFOCUS 7.6.10
Microsoft	SQL 2008 and Performance Point Server 2007
SAS	Business Intelligence Version 9.2
MicroStrategy	MicroStrategy 9 R.2
Oracle	Oracle OBIEE Version 10.1.3
QlikTech	QlikView 9
SAP	Business Objects XI Version 3.2

Vendor Evaluation

The Scorecard

	Completeness of Solution	Features & Functionality	Affordability	Usability	Company Strength	Vendor Ranking
IBM Cognos	***	**1/2	**	**	***	Champion
SAP Business Objects	***	**1/2	**	**	***	Champion
SAS	***	***	**	*1/2	***	Champion
Microsoft	**	**	***	*	***	Contender
MicroStrategy	***	**1/2	**	**	**	Contender



Oracle Hyperion	***	**	*½	**	***	<i>Contender</i>
QlikTech	**	**	***	***	*	<i>Emerging Player</i>
Information Builders	***	**	**	**	*	<i>Vanguard</i>

* ... between 1 - 33% , ** ... between 34 - 66% , *** ... between 67 - 100%

Note: Rankings in the scorecard go from one star (lowest) to three stars (highest). To generate a customized vendor short list specific to your BI requirements, refer to the Info-Tech "[Business Intelligence Vendor Selection Tool](#)."

Champion Landscape

Stack Vendor: IBM Cognos Version 8.4

Product	Cognos offers a complete BI solution. Cognos 8 was a rebuild of the earlier Cognos architecture, and offers some of the best integration between BI components with shared metadata.
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Solution Overview	Data Integration	IBM InfoSphere Data Integration
	Database Management	IBM DB2
	BI Tool	IBM Cognos 8 Version 8.4.1
	Advanced Analysis	IBM Cognos TM1
	Presentation	IBM Cognos Report Studio
	BPM Solution	IBM Cognos Now!
	Analytical MDM	IBM Cognos 8 Business Viewpoint
	Mobile BI	IBM Cognos 8 Go! Mobile
	SMB Product	IBM Cognos Express
	Office Integration	IBM Cognos 8 Go! Office
	Search	IBM Cognos 8 Go! Search

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The IBM acquisition of Cognos formed one of the megavendors of the BI market. Cognos 8 has been lauded as one of the best survivors of such acquisitions. However, like the other megavendors, the transition to IBM support was a rocky road for many customers. Existing relationships were lost, and many customers complain about the more rigid, bureaucratic, structure of IBM's support.

Cognos provides its users with an end-to-end BI solution that has extremely tight integration amongst the BI components. However, clients focused on sole sourcing their BI solution from their ERP or CRM vendor have tended to overlook IBM Cognos. In spite of this misperception, Cognos does have very strong integration with, for example, SAP environments. IBM Cognos Now! Also offers integration with CRM environments enabling service level agreement (SLA) monitoring, in addition to business performance tracking.

IBM's acquisition of SPSS led to the announcement of their new Predictive Analytics business services. This is a step forward that broadens the appeal of IBM's roadmap in the BI market. However, IBM is not without competition in the advanced analytics space. The partnership of SAS and the consulting giant Accenture promises to be a stiff challenger to IBM. Finally, IBM is poised to offer industry specific functionality – while building a broader vertical focus – thanks to the acquisition of Initiate Systems.



Strengths	Challenges
<ul style="list-style-type: none"> • Offers the best integration between BI components. • Strong product roadmap; IBM is extending into analytics and new industry verticals. • Reliable vendor, with a strong partner network. 	<ul style="list-style-type: none"> • Transition to IBM's product support has been difficult for existing Cognos users. • Analytics business faces stiff competition from the SAS/Accenture partnership. • For native integration with ERP or CRM, customers must turn to other vendors.

Stack Vendor: SAP Business Objects XI (Version 3.2)

Product	SAP BusinessObjects is a BI solution that provides comprehensive functionality, and has a strong set of features that enable users to make business decisions based on solid data and analysis.	
Solution Overview	Data Integration	BusinessObjects Data Integrator/ Netweaver
	Database Management	N/A
	BI Tool	BusinessObjects XI V.3.1 (SP2)
	Advanced Analysis	BusinessObjects Voyager; BEx Analyzer, DAP BusinessObjects Predictive Workbench;
	Reporting	Crystal;
	Dashboards and Visualization	SAP BusinessObjects Xcelsius Enterprise
	BPM	Enterprise Performance Management
	Ad Hoc	Web Intelligence
	SMB Product	BusinessObjects Edge
	Data Exploration/ Search	SAP BusinessObjects Explorer



Peer Experience

"When someone in our department understands what an end user needs and understands the data sources, he can throw together a BusinessObjects Universe in minutes. Usually it's less than an hour. And that time is not so much about creating the Universe. It's about understanding and verifying that he is on the same page as the end user with regards to the data."

-IT Director, Retail

SAP BusinessObjects is a superior product with a strong set of analytical and reporting features. The ad hoc querying is excellent, and the data visualization features make it easy for users to understand the business implications of analyzed data. SAP BusinessObjects Explorer is celebrated as one of the best search tools for BI data exploration.

In 2009, SAP attempted to change its licensing model around customer support, which created a lot of pushback from unhappy customers. Users were feeling pushed into the expensive Enterprise Support offered by SAP. In response, SAP moved to a flexible tiered-level support pricing model, which has been well received by customers.

Changes on both the business processes around support (moving to the SAP support model) and integration of BusinessObjects with the SAP environment has led to some challenges. Out of all the megavendors, customer reviews indicate that SAP clients have experienced one of the roughest transitions to SAP's new customer support. And though SAP BusinessObjects offers integration with their environment, there have been reported performance issues. SAP has made concerted efforts to address these issues on the technical side, while clearly identifying the best practices necessary for avoiding them.

Pro	Con
<ul style="list-style-type: none">• Powerful search capabilities, allows for easy data exploration.• Excellent querying, reporting, and data analysis functionality. Also boasts strong data visualization capabilities.• Offers tiered levels of support, giving customers more cost-savings options.	<ul style="list-style-type: none">• Difficult transition for existing BusinessObjects customers to the new customer support from SAP. Many found it lacking.• Proposed increases to licensing and support costs have been ill-received.



	<ul style="list-style-type: none"> • Less than perfect integration with BusinessObjects and existing ERP systems of users.
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Pure Play Vendor: SAS Business Intelligence version 9.2

Product	SAS is a vendor that focuses heavily on the analytics portion of business intelligence. This vendor has made a name for itself as the industry leader in dedicated analytical applications.	
Solution Overview	Data Integration	SAS Enterprise Data Integration Server
	Database Management	Integration with multiple tools (Teradata etc.) – No dedicated DBM toolset.
	BI Tool	SAS Business Intelligence
	Advanced Analysis	SAS Analytics (Data Mining, Text, Forecasting etc.); numerous industry dedicated functional business applications (e.g. Customer Intelligence, Market Intelligence etc.).
	Presentation Tools	SAS Information Delivery Portal
	BPM	SAS for Performance Management
	Ad Hoc	SAS Business intelligence
	SMB Product	SAS BI for mid-sized businesses SAS Enterprise BI for mid-sized businesses
	Data Exploration/ Visualization	JMP Data Visualization
	Search	Search Interface to SAS Content

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SAS remains the gold standard for business analysts requiring sophisticated analytical capabilities, such as predictive modeling, data mining, and text analysis. Compared to other BI vendors, SAS has a proven



track record in the development of rich business applications focused on specific industries (e.g. Fraud Detection). SAS has been extremely successful at leveraging deep industry expertise to develop industry specific metrics/KPIs and well tuned analytical models. SAS is one of the leaders in terms of re-investment in research and development, which shows in its groundbreaking applications.

Although its reputation suggests otherwise, SAS has considerable breadth in its offerings outside the analytics space when compared to other pure-play vendors. In particular, SAS has a solid portfolio of data management capabilities, data quality tools and methodologies (DataFlux) and data integration capabilities through the SAS Data Integration Server. SAS products do require SAS specific expertise for programming and application development. Beyond this, SAS analytical tools also demand a statistically sophisticated user base to appropriately leverage the technology in a decision making capacity.

For those organizations focused on the visual appeal of products, SAS is still a laggard when it comes to the report presentation formatting and dashboard design. SAS's intense focus on analytical capabilities has come at the expense of pixel perfect report formatting and some the more visually appealing functionality observed in competitors product offerings (e.g. limited Flash functionality). Web Report Studio produces static reports only. Clients can look forward to improvements in dashboard design with a new Flash interface in the next product release.

SAS's recently announced partnership with Accenture represents a critical response to IBM's SPSS acquisition and predictive analytics business services announcement. Info-Tech believes that the success of this partnership (and, equally, IBM's business services for analytics) will depend largely on how knowledge transfer is managed for their customers. The ability to leverage the analytical capabilities of these toolsets depends on having the requisite intellectual capital in-house. Increased competition in the analytics space may result in more aggressive pricing, which is a bonus for customers.

Strengths	Challenges
<ul style="list-style-type: none">• Powerhouse in advanced analytics; tool of choice for Business Analysts.• Develops highly advanced vertically focused business applications, e.g. Fraud Detection for financial institutions.• Strong vision and product roadmap; supported by strong investment in research and development.	<ul style="list-style-type: none">• Usability hampered by the need to understand the SAS programming language for some functionality. However, GUIs do make some operations easier to manage and language conversion tools are available through SAS.• Leveraging advanced tools effectively requires statistically savvy analysts as the primary end users of the tools.



- Increased focus on the presentation layer is slowly improving the look and feel of SAS reports and new dashboards.
- Excellent Microsoft Office Integration.

- Visual presentation of reports and dashboards/scorecards are still lagging competitors in look and feel and capability.
- IBM SPSS acquisition represents the first real threat to SAS in the advanced analytics space.

Contender Landscape

Stack Vendor: Microsoft

Product	Microsoft has repackaged its BI offerings and lowered the cost of entry. This has generated enormous interest in Microsoft's product.	
Solution Overview	Data Integration	SQL Server Integration Services
	Database Management	SQL Server RDMS
	BI Tool	Performance Point Server 2007/ Excel
	Advanced Analysis	Pro-Clarity Components in Performance Point Server 2007
	Presentation Tools	SQL Server Reporting Services/ Performance Point Server 2007/ SharePoint 2007
	BPM	Performance Point Server 2007
	Ad Hoc	N/A
	SMB Product	N/A
	Data Exploration	N/A
	Search	N/A

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Peer Experience

"We looked at the major players that were out there. We came up with quotes on an enterprise level that were somewhere north of half a million dollars, and we couldn't find anybody in the organization that wanted to foot that bill. Then we came across Microsoft BI and our price tag dropped significantly, which made it a very smart deal for us.

- IT Director, Manufacturing

Microsoft offers the most competitive pricing for a BI solution in order to move BI to the masses. Microsoft's BI solution also integrates well with its own products such as SQL, Dynamics, and Office. End-user familiarity with these products ensures a stable market share for Microsoft, as customers are more likely to purchase a BI tool that integrates with existing applications.

Microsoft will be moving its BI tools into SharePoint 2010, to facilitate this adoption (termed "project Gemini"). Analysis services will be modified to include column oriented and in-memory capabilities viewable through Excel 2010. In addition, Excel will break the 64K rows of data and enable the viewing of 100 million records. Additional Excel functionality (e.g. "slicers" and spark lines) is planned to enable better reporting capabilities. These changes will enable interactive data analysis using the data cube capabilities of SQL, with Excel on the front-end and SharePoint as the BI portal for collaboration.

Reporting and analysis for Microsoft are still highly reliant on IT support – which hinders the efficiency of projects involving this toolset. Microsoft also faces ease-of-use challenges from a development perspective. There is no single metadata layer, which must be custom built, requiring Microsoft expertise and precious development time. The development of applications and cubes also requires more coding effort and takes longer than other solutions.

Microsoft's shifting roadmap creates uncertainty. Although there is broad integration capability between Microsoft products, there is no clear vision for BPM type integration. The focus, instead, has been eaten up by product reorganization. However, these moves do provide functionality targeted to the largest segment of the BI market.

Strengths	Weaknesses
<ul style="list-style-type: none">• Lowest total licensing and support costs.• Sharepoint is a good enterprise portal for wider deployments; BI is available within SharePoint 2010 ("Project Gemini").	<ul style="list-style-type: none">• No single metadata layer; must be custom built.• Development of reporting/analytics functions is still highly IT dependant.



- Better data slicing due to in-memory capabilities of Analysis Services and Office 2010.
- Acquisition of DATAlegro allows for data warehousing capabilities.

- Requires more development time than competing BI solutions.
- Significant Microsoft expertise is a must.
- Shifting roadmap around BI. There is no clear vision for BPM integration.

Pure Play Vendor: MicroStrategy version 9 release 2

Product	MicroStrategy is a global player in Business Intelligence. The product offers faster, easier, enterprise wise BI with slick dashboarding capabilities and stellar integration with Microsoft Office.	
Solution Overview	Data Integration	MicroStrategy Multisource Option
	Database Management	N/A
	BI Tool	MicroStrategy 9
	Advanced Analysis	MicroStrategy Intelligence Server; OLAP services;
	Presentation Tools	MicroStrategy Report Services; Reporting Suite, MicroStrategy Web; MicroStrategy Office
	BPM	N/A
	Ad Hoc	MicroStrategy Intelligence Server
	SMB Product	MicroStrategy Reporting Suite
	Data Exploration	MicroStrategy Intelligence Server
	Search	MicroStrategy Intelligence Server

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MicroStrategy's greatest strength lies in its reporting capabilities. Report caching and SQL optimization makes this an excellent BI tool for heavy reporting environments. MicroStrategy also offers some of the best dashboarding capabilities in terms of look, feel, and functionality. Microstrategy features some of the best available integration with Microsoft Office products. Some of this functionality is out-of-the-box, however their superior Microsoft integration toolset must be purchased.



Version 9 represents significant improvements in terms of usability, especially with the cube and dashboard design wizards. The downside is that there remains a steep learning curve for the development of reports, which MicroStrategy has improved in R2. Much of the newer functionality can only be deployed on a 64-Bit architecture, which could make it a more expensive proposition for organizations that still live in the 32-Bit world. MicroStrategy has enjoyed a longstanding reputation for its strengths with in-memory ROLAP. This dominion is being challenged, as the majority of leading BI vendors today now offer in-memory solutions as a part of their product offering. Often overlooked, MicroStrategy also offers a competitive set of analytical capabilities for more sophisticated analysts.

This vendor is known in the market as having traditionally focused only large enterprise/large data volume focus. MicroStrategy has a reputation for rigidity and in their pricing, but has attempted to shake this image by offering the MicroStrategy Reporting Suite as a free package for up to 100 users. This is the same software that is offered on MicroStrategy enterprise packages. The MicroStrategy Reporting Suite provides small organizations and departments with an entry point into using MicroStrategy with a seamless migration path to any future enterprise deployment without creating business intelligence silos.

Pro	Con
<ul style="list-style-type: none">• Excellent choice for organizations that need heavy reporting, thanks to report caching and SQL optimizations.• Great dashboard capabilities, one of the best in terms of look and feel (usability).• Flexibility in licensing makes the product more accessible.• Excellent integration with Office (sold separately).	<ul style="list-style-type: none">• In-memory ROLAP is no longer a key differentiator, as many vendors now offer in-memory solutions.• Steep learning curve for report development• Reputed to have a large enterprise/large data volume focus.• No long term product vision beyond wider BI deployments and ease of use.

Stack Vendor: Oracle OBIEE version 10.1.3

Product	The acquisitions of Hyperion and Siebel have not been an easy transition for customers from a customer support perspective, but the move has boosted Oracle's position in the BI space, especially for finance-related use. Note that OBIEE is an open-platform offering and does have a strong footprint in the communications, retail, healthcare, and public sectors.
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Solution Overview	Data Integration	Oracle Data Integrator, Oracle GoldenGate
	Database Management	Oracle Database
	BI Tool	Oracle Business Intelligence Suite Enterprise Edition
	Advanced Analysis	Oracle Essbase
	Presentation Tools	Oracle Business Intelligence Suite Enterprise Edition
	BPM	Oracle BPM Suite
	Ad Hoc	Oracle Business Intelligence Suite Enterprise Edition
	SMB Product	Oracle offers Standard Editions for most of its technology products. These editions are tailored to midmarket customers.
	Data Exploration	Oracle Data Mining
	Search	Oracle Secure Enterprise Search

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The integration of Hyperion and Siebel has made Oracle Business Intelligence Suite Enterprise Edition (OBIEE) has made it the darling of finance departments across a broad range of vertical industries. Oracle has some of the most advanced and user friendly packaged BI analytic applications, with a variety of pre-built features (canned reports, dashboards, and even data models). However, Oracle does have some of the highest and most rigid support and maintenance costs (22% of net licensing cost). Rigid policies regarding these support services and poor third party support has often been the complaint of existing Hyperion customers, who stayed with Oracle after the acquisition.

OBIEE boasts a feature rich platform that is not Oracle centric. Oracle's OLAP engine Essbase continues to be one of the best offerings in the industry. Like many of the other vendors, this capability is licensed separately. The continued delay of the release of the next version of OBIEE (Release 11g) has kept customers waiting for almost two years for any significant upgrades. As a result, OBIEE is currently lagging the other megavendors in terms of innovative functionality. We fully expect this to change with the next release. But, for now, users appear to remain satisfied with existing functionality.



Pro	Con
<ul style="list-style-type: none"> • Strong adoption in finance departments across a variety of industry verticals bolstered, in large part, to the Siebel and Hyperion acquisitions. • Excellent business applications with improving integration across the Oracle platform. • Open source, flexible development platform. • OLAP engine and DBMS are some the best on the market. • Acquisitions of Siebel/Hyperion continue to make this a robust BI toolset for finance. 	<ul style="list-style-type: none"> • Rigid policies regarding third party support, and service agreements. This has been a pain point for the existing Hyperion client base. • It has been nearly two years without any upgrades to the product. Version 11g continues to be delayed. • Relatively high support and maintenance costs. • Challenging to customize for those responsible for application development. This is pain point is minimized to some degree by the rich set of prepackaged applications.

Emerging Player Landscape

Pure Play Vendor: QlikView 9

Product	Departmental BI is QlikView's forte. Thanks to an easy to use interface, extremely fast deployment timeframe, and low cost of ownership - this solution is an excellent choice for trying BI for the first time.	
Solution Overview	Data Integration	N/A
	Database Management	N/A
	BI Tool	QlikView 9 (Enterprise; Server)
	Advanced Analysis	QlikView Analyzer
	Presentation Tools	QlikView Publisher
	Distribution	QlikView AccessPoint
	SMB Product	QlikView 9



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QlikView boasts near instant response time on data volumes as high as a billion records across thousands of users. Their in-memory analysis and built-in data integration combined with 64-bit architecture is what allows for such speedy processing and scalability. While impressive, this is not as big a differentiating factor as it would have been a few years ago. Today, many vendors offer this level of in-memory processing. Visual data recovery is another key strength, but again, QlikView is losing their competitive edge here as many vendors now offer this feature.

This product really shines in two areas: fast deployment times and ease-of-use. Most customers are live within 30 days, with their first application running within a week. QlikView also offers deployment in the cloud, which is a big bonus for customers looking for a BI solution on the cheap. In terms of usability, QlikView does the little things right. The user interface is web-based, visually appealing, and works on an easy point and click system. End users are said to require little or no training to start using this BI solution.

This BI solution has proven itself in terms of smaller deployments, often within a single department of an organization. Now, the vendor needs to move beyond this and show how it can integrate between departments. QlikView lacks an enterprise semantic layer; it requires additional metadata management for large-scale deployments. Development of scorecards and metadata management tools should be this vendor's focus in the coming years.

Pro	Con
<ul style="list-style-type: none">• Integrates with SAP, salesforce.com and SharePoint. Has open API for real-time integration.• One of the best looking displays for BI, due to a rich GUI and visual data recovery.• Highly intuitive user interface (color coded, point and click, web-based portal).• Fastest reported deployment times, also offers a SaaS option. Very suitable for department level BI or small deployments.• Lower cost than most major BI vendors.	<ul style="list-style-type: none">• In-memory analysis is no longer a key differentiator, as it is now offered by most vendors.• Does not offer predictive modeling; weak advanced analytics capabilities.• Difficulty scaling to the enterprise layer (lacks the enterprise semantics layer).• Stiff competition from more established vendors, is not able to offer the same quality of support.• Need to solidify their product roadmap with broader functionality.



Vanguard Landscape

Pure Play Vendor: Information Builders version WebFOCUS 7.6.10

Product	WebFOCUS is an operational BI platform that boasts architectural superiority, self-optimizing servers, and high scalability. The infrastructure is able to access, reconcile, cleanse, and prepare all types of data.	
Solution Overview	Data Integration	iWay; ETL Manager
	Database Management	N/A
	BI Tool	WebFocus 7
	Advanced Analysis	WebFocus 7
	Presentation Tools	Focus (Host Based Reporting); WebFocus Managed Reporting
	BPM	WebFocus Performance Management
	Data Exploration	WebFocus Visual Discovery
	Search	WebFocus Magnify

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This solution focuses on powerful back-end performance. It features a robust architecture that supports a very scalable BI deployment and connectivity to various sources of data and applications across the BI platform. This integrated architecture makes WebFOCUS suitable for Business to Business deployments, as well as for operational BI needs. The ease-of-use of this product is balanced with providing users with a core set of features and functions that they will use.

The downside of this architectural focus makes the platform complex to use, and makes it heavily IT centric. Organizations with swamped IT departments will be in over their heads with Information Builders; it is much better suited to those companies who realize the benefits of BI and are truly committed to using it as a tool for informing business decisions.

Information Builders has been rated highly by customers for its quality of customer support and responsiveness when it comes to maintenance issues. This vendor is holding market share, but has not



made significant gains in recent years. This is due to a lack of awareness around the product, and the architecture driven BI strategy. This "tech" approach has made most customers turn away to a simpler solution that they might more easily understand.

Strengths	Weaknesses
<ul style="list-style-type: none">• Stronger ad hoc capabilities, thanks to improvements to the InfoAssist tool.• Excellent support and maintenance services. Users rave about the customer support.• Architecture offers excellent connectivity (data, application, and platform).• Highly scalable, suited to B2B or operational BI deployments.	<ul style="list-style-type: none">• Limited capabilities in terms of canned business applications or OLAP, in spite of improvements in parameterized reporting.• Back-end focus and complex architecture makes the solution difficult to use without IT support.• Lacks awareness in the marketplace, needs to demonstrate value without customers having to understand the complex aspects of the product.

Recommendations

- 1. Follow this 5-step strategy when selecting BI vendors:**
 - Meet business objectives with a thorough understanding of business requirements.
 - Match tool capabilities to how end users will use the tool, both technically and functionally, to avoid misuse or resistance. Low adoption will undermine the ROI of the solution.
 - Ensure that the candidate solution will be compatible with existing enterprise applications.
 - Prioritize features and functionality to match potential solutions to what your organization can afford. Calculate total cost of ownership. Training and maintenance are hidden costs that often exceed the purchase price.
 - Assess IT staff proficiency and familiarity with available offerings. Include internal product expertise in your evaluation of products for your short list.
- 2. Focus on Stack and Pure Play vendors when short listing.** Component vendors simply augment or replace specific elements of an overarching BI solution.
 - Choose BI Stack vendors if there is organizational demand for broad functionality to address current/future needs. Stack vendors also promise better integration across the BI architecture.
 - Choose Pure Play vendors to avoid over-committing to a single vendor. These vendors usually have a more defined product roadmap, and have key strengths in niche areas.



3. Pinpoint the right BI vendors using a scenario-based approach:

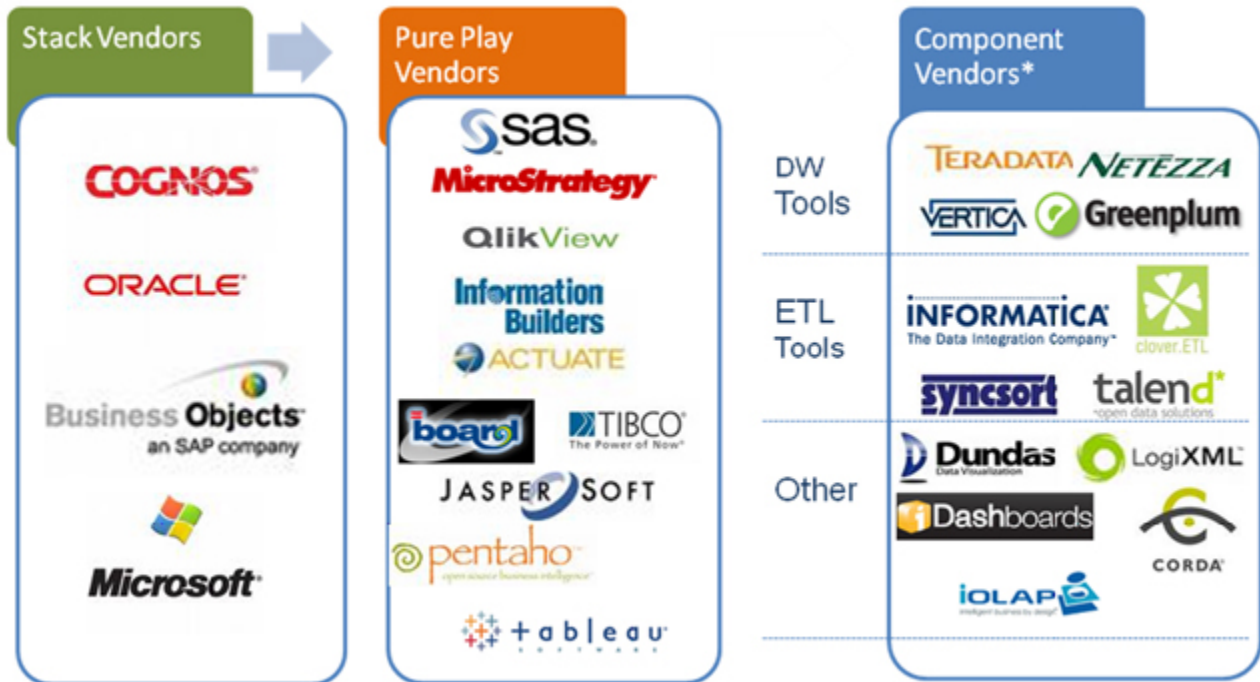
If...	Then consider...
You want to get up to speed quickly for a low cost...	QlikView, Microsoft
You want to run advanced/predictive analyses and/or need a specific industry focus...	SAS
You want the BI solution to natively integrate with existing applications...	Purchase a solution based on what you have in-house (e.g. Oracle for Oracle, SAP for SAP, etc.).
End users place a high value on the look and feel of dashboards and reports...	MicroStrategy, QlikView, and, to a lesser degree IBM Cognos, SAP BusinessObjects, Oracle.
You want a tight integration between BI components...	IBM Cognos
You have a variety of end users with disparate requirements...	SAP BusinessObjects
You want a BI tool with a strong focus on the financial industry...	Oracle/Hyperion
You want a BI tool with strong B2B capabilities...	Information Builders

Bottom Line

Selecting a BI solution can be complex, as the BI market offers a variety of vendors to choose from. Ongoing market consolidation in the BI space and an evolving technology landscape only add to the confusion. Use this vendor landscape to select the BI solution best suited for the organization based on the completeness of the solution, its features and functionality, affordability, usability, and company strength.

Appendix A: Stack, Pure Play, and Component Vendor Categories

Source: Info-Tech Research Group



(*) Note: This research report does not deal with Component vendors/tools. They are dealt with in separate parts of our research agenda.