The Forrester Wave™: Agile Business Intelligence Platforms, Q3 2015

The 13 Providers That Matter Most And How They Stack Up

by Boris Evelson

September 25, 2015

Why Read This Report

In Forrester’s 15-criteria evaluation of Agile business intelligence (BI) vendors, we identified the 13 most significant software providers in the category —Birst, GoodData, IBM, Information Builders, Microsoft, MicroStrategy, Oracle, Panorama, Qlik, SAP, SAS, Tableau Software, and TIBCO Software —and researched, analyzed, and scored them. This report details our findings about how well each vendor fulfills our criteria and where they stand in relation to each other to help application development and delivery (AD&D) professionals select the right platform for their Agile BI requirements.

Key Takeaways

BI Choices Abound With Nine Leading Vendors And Four Strong Competitors

Forrester’s research uncovered a market in which Microsoft, SAP, Qlik, MicroStrategy, TIBCO Software, SAS, GoodData, Oracle, and Tableau Software lead the pack. Panorama, Information Builders, IBM, and Birst offer competitive options.

The Agile BI Market Is Growing As AD&D Pros Focus On Supporting Business Agility

The Agile BI market is growing because more AD&D professionals see Agile BI platforms as a way to address their top challenges. This market growth is in large part due to the fact that AD&D pros increasingly trust Agile BI providers to act as strategic partners, advising them on top business, data, and information agility decisions.

Business User BI Self-Service Is The Key Differentiator In The Agile BI Market

As enterprise BI driven by technology management becomes commoditized, features that empower business users to be self-sufficient will differentiate software providers. Vendors that can deliver business user self-service features without sacrificing essential enterprise capabilities will position themselves to deliver the best BI platforms to their customers.
The Forrester Wave™: Agile Business Intelligence Platforms, Q3 2015
The 13 Providers That Matter Most And How They Stack Up

by Boris Evelson
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September 25, 2015

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Notes & Resources

Forrester conducted demos, briefings, and interviewed customer references in June 2015.

Related Research Documents

The Forrester Wave™: Enterprise Business Intelligence Platforms, Q1 2015
Forrester's 10-Step Methodology For Shortlisting Business Intelligence Vendors
It’s Time For A User-Driven Enterprise BI Strategy
Agile BI Is A Key Element In The Business Agility Equation

Customers are more and more empowered with mobile devices and cloud-based, all but unlimited access to information about products, services, and prices. Customer stickiness is increasingly difficult to achieve as they demand instant gratification for their ever changing tastes and requirements. Switching product and service providers is now just a matter of clicking a few keys on a mobile phone. Forrester calls this the age of the customer, which elevates business and technology priorities to achieve:

› **Business agility.** Business agility often equals the ability to adopt, react, and succeed in the midst of an unending fountain of customer driven requirements. Agile organizations make decisions differently by embracing a new, more grass-roots-based management approach. Employees down in the trenches, in individual business units, are the ones who are in close touch with customer problems, market shifts, and process inefficiencies. These workers are often in the best position to understand challenges and opportunities and to make decisions to improve the business. It is only when responses to change come from these highly aware and empowered employees, that enterprises become agile, competitive, and successful.

› **Information agility.** Agile enterprises must gather customer and market knowledge and rapidly incorporate it into decisions. To support and promote business agility, enterprise knowledge workers need to be empowered with easy access to agile, flexible, and responsive enterprise BI tools and applications. Yet, while organizations of all sizes made significant headway over the last two decades in their enterprise BI accomplishments, many organizations still struggle with making their data and information management, BI, and analytics environments agile.

Agile Enterprises Need Agile BI Platforms

Alas, earlier generation BI platforms are often anything but agile. Indeed, all modern enterprise BI platforms are scalable and robust, support and promote a single version of the truth, and minimize operational risk. But these capabilities carry a hefty price tag of complexity, rigidity, and inflexibility, and as a result they are slow to react to constantly changing customer and business requirements. This lack of BI agility promotes two unfortunate side effects of earlier generation BI deployments:

› **Only a small percentage of enterprise data is leveraged for business insights.** Only 40% of structured, 31% of unstructured, and 27% of semistructured enterprise data is leveraged for business intelligence and quantitative decision-making (see Figure 1).¹

› **Majority of BI applications are still built by a shadow IT process.** Forrester research finds that majority of organizations (63%) still build most (more than 50%) of the BI applications based on desktop tools such as spreadsheets. More than a quarter of respondents (26%) share an even more dreary story — 70% or more of all BI apps are built in a shadow IT environment (see Figure 2).
FIGURE 1 Only A Small Percentage Of Enterprise Data Is Used For Insights

Please estimate what percentage of the total size/volume of data within your company your company is currently using for BI

Unstructured data
- Use 31%
- Don’t use 69%

Semistructured data
- Use 27%
- Don’t use 73%

Structured data
- Use 40%
- Don’t use 60%

Base: 1,805 global technology decision-makers who know how much BI data their firm uses

Note: The percentages shown are estimates based on reported ranges; the values are not exact.

Source: Forrester’s Business Technographics® Global Data And Analytics Survey, 2015

FIGURE 2 Majority Of BI Applications Live In Shadow IT

Percent responding

- 63%
- 35%
- 26%
- 15%
- 6%
- 3%

Percent of homegrown enterprise BI apps

- 50% +
- 60% +
- 70% +
- 80% +
- 90% +
- 100%

Base: 249 North American business decision-makers

Source: Forrester’s Business Technographics® Global Data And Analytics Survey, 2014
Everything You Wanted To Know About Agile BI But Were Afraid To Ask

Point-and-click, drag-and-drop graphical user interfaces (GUIs) may be intuitive to an experienced professional with a background in command-line interfaces but not so obvious to a millennial who grew up with a thumb-typing mobile phone UI. And while menu- and prompt-driven instrumented (radio buttons, dialog boxes, etc.) applications may seem user friendly to left-brained people (who think in numbers and lists), right-brained office workers (who see the world in pictures and associations) may prefer an application driven by icons, visual associations, and artistic infographics. Forrester takes a more practical approach and describes Agile BI in highly objective and quantifiable terms, which specifically address many of the shortcomings and limitations (rigid and restrictive data models, too much reliance on technology management professionals, and many others) of the earlier generation enterprise BI platforms.

Empower Business Users To Be Self-Sufficient

Core Agile BI requires capabilities that empower business users to be self-sufficient in their BI environment with little or no involvement from technology professionals. These capabilities are typically supported by BI platform features such as:

› **Self-provisioning applications and data.** How efficiently can business users connect to new data sources and provision applications, data, and resources? This includes such capabilities as application sandboxes, data upload, data virtualization and drill anywhere, elasticity, semantic layer, and mobile delivery.

› **Data integration, mashups, and wrangling.** How efficiently and effectively can business users perform various data transformation tasks? This includes capabilities such as automodeling, calculated measures, data mashups, data wrangling, lightweight data quality functions, and write back (changing values in a cube, data mart, datawarehouse, or transactional databases).

› **BI automation.** Does the BI platform support various self-service BI automation processes that allow business users to do more with less? Beyond commoditized and nondifferentiated features like report batches, report scheduling, etc., these features should include such capabilities as auto information discovery, actionable BI, contextual BI, suggestive BI, and managing a full BI life cycle with a single integrated development environment (IDE).

› **Effective user interfaces.** How easily can business users create their own reports and dashboards and run data exploration and other relevant tasks? Going beyond highly commoditized and nondifferentiated GUI features like point-and-click and drag-and-drop, this criteria includes capabilities such as collaboration, data exploration and discovery, faceted navigation, guided navigation, information workplace integration, natural language processing (NLP), and search like GUI.
Help Business User Get More Insights With Effective Data Visualizations

Agile BI wouldn’t be complete without advanced data visualization (ADV) capabilities. Older definitions of ADV (versus static data graphs and charts) included visual querying (without writing SQL code), dynamic visualizations (where visualizations dynamically changed based on query results), and several others. These features, however, are table stakes in all modern BI platforms and no longer differentiate one vendor from another. Today we look for differentiated ADV capabilities such as:

› **Richness of ADV content.** What are the BI platform ADV capabilities in terms of richness of data visualization content like graphs and charts that are available out of the box? This includes such capabilities as cockpit gauges, custom charts and maps, geospatial representations, and infographics.

› **Data visualization effectiveness.** What are the BI platform ADV capabilities in terms of allowing business users to efficiently and effectively visualize data sets and act on the results? This includes capabilities such as animations, autosuggestions, modes of interaction with data visualizations, multiple dimensions (visualizing more than several data attributes at a time), and storyboarding. Autosuggestions is a top differentiator in ADV these days. Look for capabilities that help the user select the best possible visualization or chart type. Can the system analyze the input data, recognize the pattern and key field, and automatically propose a “best practice” visualization for an individual data set?

Look For Technology Professionals To Provide Additional Features

Even though Agile BI is mostly all about business user self-sufficiency, do not overlook the fact that AD&D pros still need to develop, customize, deploy, and support multiple BI capabilities. Look for BI platform features that can empower AD&D pros to:

› **Deploy BI platforms and applications.** What are the capabilities that AD&D pros will need to deploy and support BI platforms and applications more efficiently? These include BI platform features such as monitoring and selectively productionalizing user-generated applications, analyzing the impact of changes of any BI component on all others, deploying data architecture that supports data virtualization and drill anywhere, as well as monitoring and enforcing SLAs.

› **Customize BI applications.** What are the capabilities that AD&D pros will need to customize BI applications? These include BI platform features such as actionable BI (integration with ERP and CRM metadata, native BPM capabilities, certified integration with BPM and BRE platforms, write back to a DW, ERP, CRM applications), cascading parameters and nested prompts, contextual BI (embedding BI into an office or a transactional application), guided navigation (AKA report building wizards), and parameterized reporting.
Agile BI Platforms Evaluation Overview

To assess the state of the Agile BI platforms market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top Agile BI platforms vendors.


After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 15 criteria, which we grouped into three high-level buckets:

- **Current offering.** We assessed each vendor’s current offering by considering all of the features and capabilities reviewed above. We also evaluated a short demonstration by each vendor outlining its key capabilities and surveyed a total of 29 vendor customers.

- **Strategy.** We reviewed each vendor’s strategy and considered how well each vendor’s plans for product enhancement position it to meet future customer demands. We also looked at the financial and human resources the company has available to support its strategy.

- **Market presence.** In this particular research, we only considered vendor BI revenues and number of customers as a measure of global market presence. For a more comprehensive market presence analysis, please refer to the “The Forrester Wave: Enterprise Business Intelligence Platforms, Q1 2015” where we combined information about each vendor’s financial performance, installed customer base, and number of employees across major geographical regions with information about its partnership ecosystem and its horizontal and vertical industry applications.

Evaluated Vendors Have What It Takes To Support Complex Agile BI Requirements

Forrester included 13 vendors in the assessment: Birst, GoodData, IBM, Information Builders, Microsoft, MicroStrategy, Oracle, Panorama Software, Qlik, SAP, SAS, Tableau Software, and TIBCO Software. Unlike the Enterprise BI Wave evaluation where we consider and evaluate the entire suites of relevant BI products, in the current Forrester Wave we only evaluated one BI tool per vendor (see Figure 3). Each of these products has:

- Architecture that can query DBMS using SQL and MDX.

- Technology that can analyze data from multiple sources, not just a single ERP app.

- Customers that use these products for more than one business domain (for example, not just marketing analytics).

- Frequent interest from Forrester clients in the form of questions about or mentions of a vendor in the context of inquiries about BI.
› Status as a top 13 software product by Agile BI revenue and market presence as indicated by interest from Forrester clients.

› A version that was generally available by September, 2015.

The market is by no means limited to these top 13 vendors. Forrester encourages AD&D pros to consider a much longer list of more than 50 vendors and use Forrester recommended methodology to short list them before using this Forrester Wave to narrow down the choices even further.3

**FIGURE 3** Evaluated Vendors: Product Information

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Product</th>
<th>Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>GoodData</td>
<td>GoodData</td>
<td>1.3.x</td>
</tr>
<tr>
<td>IBM</td>
<td>IBM Watson Analytics</td>
<td>Sept. 2015</td>
</tr>
<tr>
<td>Information Builders</td>
<td>WebFOCUS InfoAssist/InfoDiscovery</td>
<td>8.1.04</td>
</tr>
<tr>
<td>Microsoft</td>
<td>Power BI</td>
<td>Sept. 2015</td>
</tr>
<tr>
<td>MicroStrategy</td>
<td>MicroStrategy 10</td>
<td>10</td>
</tr>
<tr>
<td>Oracle</td>
<td>Oracle Business Intelligence Cloud Service</td>
<td>Sept. 2015</td>
</tr>
<tr>
<td>Panorama</td>
<td>Panorama Necto</td>
<td>15.1</td>
</tr>
<tr>
<td>Qlik</td>
<td>Qlik Sense Enterprise</td>
<td>2.1</td>
</tr>
<tr>
<td>SAP</td>
<td>Lumira</td>
<td>V. 1.28</td>
</tr>
<tr>
<td>SAS</td>
<td>SAS Visual Analytics</td>
<td>7.3</td>
</tr>
<tr>
<td>TIBCO Software</td>
<td>Spotfire</td>
<td>7.0</td>
</tr>
</tbody>
</table>
Agile BI Is A Buyer’s Market That Offers Plenty Of Choices

The evaluation uncovered a market in which (see Figure 4):

› **Agile BI buyers are in great hands with nine market Leaders.** Microsoft, SAP, Qlik, MicroStrategy, TIBCO Software, SAS, GoodData, Oracle, and Tableau Software lead the Agile BI pack. While many Agile BI platform features are becoming commoditized, it’s not the individual capabilities that differentiate the Leaders, but rather the completeness, comprehensiveness, and integration of the entire suite of agile capabilities that sets the Leaders apart from the rest of the vendors in this category. While many of the Leaders appear to be closely grouped, each of them differentiates itself in terms of specific individual capabilities. For example, in this research, Forrester found that deploying BI apps by AD&D pros, effective UI, and ADV functionality appear to be evenly supported by all of the vendors. However, BI application customization by AD&D pros, self-provisioning of BI applications and data, data integration, automation, and ADV content vary significantly among the vendors.

› **Panorama Software, Information Builders, IBM, and Birst offer competitive options.** Vendors in the Leaders category can by no means rest easy: the Strong Performers are hot on their heels, including some of the Agile BI newcomers from the earlier generation enterprise BI market. In many specialized situations, these vendors can even outperform the Leaders. Some of the Strong Performers even received higher scores in customer feedback. Effective user interface and ADV functionality is where Forrester finds the smallest gaps between the Leaders and the Strong Performers.
FIGURE 4 Forrester Wave™: Agile Business Intelligence Platforms, Q3 ‘15

Go to Forrester.com to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.
## Vendor Profiles

### Leaders

- **Microsoft Power BI leads the Agile BI pack.** Throughout the history of the BI market, Microsoft has dominated and will continue to dominate the market with Excel, the de facto and most commonly used BI platform around the globe. Indeed, with every new release of its BI platform, Microsoft makes it more difficult for large enterprises that have already deployed Microsoft Office, Office365, SharePoint, and SQL Server not to consider Power BI as its enterprise BI platform. Familiar Excel UI, agile in-memory PowerPivot architecture, hybrid (on premises SQLServer-based data, cloud-based Power BI platform) deployment, completeness of BI functionality (from data sourcing to visual storytelling), and low acquisition cost differentiate Power BI from its competition.

**Work with a trusted Microsoft implementation partner to increase chances for success.** Buyers should be aware that Microsoft only provides direct presales/post-sales support to a handful of its top accounts. All other organizations should first secure a trusted relationship with a Microsoft implementation partner before committing to Power BI.

- **Lumira makes SAP a formidable leader in Agile BI.** Under the covers, SAP Lumira data architecture is based on an index. Such architecture gives Lumira users extra flexibility to slice and dice the data with few of the limitations that are usually imposed by relational or multidimensional...
data models. In addition to providing a highly flexible UI, Lumira was one of the pioneers of data preparation functionality built right into the tool, reducing dependency on third-party data integration platforms. Lumira comes in five flavors: a desktop version that serves as a business user sandbox; a server version that supports collaboration in departmental and workgroup applications; a server version for the SAP BusinessObjects BI Platform, which can export Lumira content to the rest of the SAP BusinessObjects suite; Lumira Cloud for cloud-based BI applications and outside-of-the-firewall data distribution; and Lumira in Hana for highly scalable large enterprise deployments. These options support the “start small, think big” approach — one of BI deployment’s best practices.

**Buyers need to get comfortable with SAP multiproduct approach to BI.** One concern that Forrester often hears about SAP is that innovation and functional richness sometimes trump product-to-product integration; customers still face multiple user interfaces and cannot reuse some objects across various products within the SAP BusinessObjects suite. Additionally, Forrester is not aware of a critical mass of Lumira deployments in non-SAP-centric organizations, and therefore cannot confirm the level of SAP customer support in such deployments.

› **Qlik continues to be a top client choice for self-service data exploration.** Data visualization is a hot buzzword these days, but it’s no panacea. Most data visualization tools rely on underlying relational or multidimensional data models, limiting them to answering questions prebuilt into the data models. Qlik Sense breaks through such barriers with associative data architecture that exposes any-to-any relationships between entities and attributes. Business users can explore these relationships and uncover previously unknown information just by typing in a few characters, words, or sentences (in addition to the standard point-and-click operations). Qlik’s native in-memory architecture allows business users to interactively analyze the data with very low latency (Qlik Sense also offers a pass through mode where it can combine in-memory data with database based queries). Qlik has recently closed some of the gaps in its BI portfolio with the Qlik Sense cloud-based platform.

**Supplement Qlik deployment with compensating large enterprise data management.** Forrester clients occasionally express concern that Qlik Sense and other BI platforms with roots based on desktop architecture are more challenging to manage across large enterprise deployments than BI platforms with enterprise roots, shared semantic data layers, and relational online analytical processing (ROLAP) architecture. Forrester recommends that clients using Qlik Sense develop compensating processes and controls (in the data integration and data management layers) to ensure reusability and uniform usage of enterprise data assets.

› **MicroStrategy leads the market with seamlessly integrated Agile BI suite.** MicroStrategy’s purely organic growth resulted in a single seamlessly integrated BI platform that includes all of the components necessary for Agile and enterprise BI: desktop, server, cloud, and mobile. All
components are organically integrated, can share content, and use the same UI. This seamless integration allows business users to build applications in MicroStrategy Desktop or Cloud, which technology professionals can then migrate to the enterprise server platform for application sharing, scalability, and control. Unlike BI platforms with desktop and departmental roots, MicroStrategy is based on a large enterprise grade relational online analytical processing (OLAP) engine with drill-anywhere capability. Such architecture allows enterprises to reduce siloed BI applications, consolidate BI semantic layer, and, in the end, achieve lower long-term total cost of ownership.

Buyers should ensure they can access a pool of local MicroStrategy resources. Even though MicroStrategy is a relatively large vendor with a global network of partners, large global enterprise buyers should still perform due diligence on the availability of local MicroStrategy resources.

› **TIBCO Spotfire leads with advanced data visualization — a space shuttle of Agile BI.** Agile BI does not have to stop at just data exploration and visualization. TIBCO looks beyond these increasingly commoditized capabilities by embedding advanced predictive (based on its native S and open source R) and streaming analytics into Spotfire and integrating Spotfire with the rest of its data and process management software portfolio, including real-time event processing technology. Spotfire’s native in-memory architecture allows business users to interactively analyze the data with very low latency (Spotfire also offers a pass through mode where it can combine in-memory data with database based queries). TIBCO’s rich set of APIs and business process management tools make Spotfire a leading vendor to support clients’ systems of insight capabilities with embedded, pervasive, and actionable BI.⁴

Complement Spotfire deployment with integrated large enterprise data management. Forrester clients occasionally express concern that Spotfire and other BI platforms with roots based on desktop architecture are more challenging to manage across large enterprise deployments than BI platforms with enterprise roots, shared semantic data layers, and ROLAP architecture. Forrester recommends that clients using Spotfire develop compensating processes and controls (in the data integration and data management layers) to ensure reusability and uniform usage of enterprise data assets. Additionally, even though Spotfire is part of TIBCO with a global network of partners, large global enterprise buyers should still perform due diligence on the availability of local Spotfire resources.

› **SAS, a global leader in advanced analytics, now offers a top Agile BI platform.** SAS has built on its traditional strengths in advanced predictive analytics platform plus vertical industry and business domain specific advanced analytics applications with a formidable Agile BI product — Visual Analytics, available both as on-premises licensed software or in the cloud via SAS Visual Analytics for SAS Cloud (SaaS). While other Agile BI tools may be limited in their performance and scalability by the underlying database performance or the amount of data that can fit into memory on a single desktop or a server, Visual Analytics is based on an in-memory data grid engine, LASR. The pure in-memory architecture makes Visual Analytics highly scalable and allows users to visualize and analyze data interactively, with very low latency.
Buyers need to adjust to SAS server-only architecture and non-transparent prices. A few concerns about SAS Visual Analytics include an absence of a full client “sandbox” offering, lack of commercial pricing transparency (SAS makes government and some cloud pricing publicly available), and a failure to offer perpetual software licenses.

› GoodData leads the market with “insights as a service.” GoodData appeals to buyers who are looking for a single Agile and integrated enterprise end-to-end BI platform that resides in the cloud, and therefore, takes the burden of maintenance, support, and upgrades away from enterprise technology professionals. In the latest release, GoodData introduced an innovative and differentiated capability that it calls “insights as a service.” Its engine understands the context of your problem and generates the most likely path to the next insight, based on the collective intelligence developed from millions of GoodData community interactions. For example, a mouse hovering over a sales pipeline metric will automatically generate a dashboard analyzing the metric (a single click to a dashboard) and then suggest the next step such as drilling down a time, region, or a customer segment dimension.

Be cautious if your use case calls for hybrid on-premises and cloud deployment. GoodData works best with cloud data sources because even on-premises data still needs to be moved to the cloud in the GoodData environment (so GoodData is not a good option for clients looking for hybrid cloud and on-premises deployments). Because GoodData is still a relatively small vendor, large global enterprise buyers should also perform due diligence on the availability of local GoodData resources if they are looking to use GoodData as BI development PaaS.

› Oracle is the new 800lb gorilla in the Agile BI market. Oracle BI Enterprise Edition — OBIEE — has always been a formidable market leader in enterprise BI. ROLAP-based BI Server for complex large enterprise deployments and common metadata shared by OBIEE, Oracle ERP/CRM, and Oracle’s industry and business domain focused BI applications have set Oracle BI apart from the competition for years. There was only one gap in OBIEE — few Agile BI capabilities. In 2015, Oracle closed the gap and hit the ground running with its Agile cloud BI offering — Oracle BI Cloud Services (OBICS). OBICS will appeal to buyers who are looking for a single Agile and integrated enterprise end-to-end BI platform that is residing in the cloud, and therefore, taking the burden of maintenance, support, and upgrades away from enterprise technology professionals. It will be especially attractive to buyers who also have a use case to implement Oracle cloud databases and Oracle cloud BI applications.

Be prudent if your use case calls for hybrid on-premises and cloud deployment. OBICS works best with cloud data sources because even on-premises data still needs to be moved to the cloud and into the OBICS environment.

› Tableau Software continues to lead the market with highly effective data visualization.
Building effective data visualization requires much more than just technology. Very few BI developers and business analysts have a background in graphical design and data visualization science. Rather than struggling with custom coding and designing an effective visualization,
users and developers can rely on Tableau to have already incorporated all of the best practices into the platform. As a result, Forrester clients often choose Tableau because they perceive the vendor as a thought and market leader in self-service agile data visualization. Tableau is the only vendor Forrester is aware of that received HichertiBCS Certification for International Business Communications Standards. Tableau has recently introduced a unique and highly differentiated feature it calls Level Of Detail (LOD) that allows analysis and visualizations to be performed at different levels of aggregation and granularity.

**Supplement Tableau deployment with integrated enterprise data management.** Forrester clients often express concern that Tableau and other BI vendors with roots based on desktop architecture are more challenging to manage across a large enterprise deployment than BI platforms with enterprise roots, semantic data layers, and ROLAP architecture. Forrester recommends that clients using Tableau Software develop compensating processes and controls (in the data integration and data management layers) to ensure reusability and uniform usage of enterprise data assets.

**Strong Performers**

› **Panorama offers “cool” Agile BI features on top of a Microsoft BI stack.** If you are in the market for collaborative BI and are looking for features like report and dashboard annotations, discussion threads, and social tagging and ranking of BI content, look no further than Panorama Software Necto. Necto then takes collaborative BI to the next level with a “suggestive BI” engine that recommends most relevant BI content based on popular usage by your peers. Because Necto leverages the power of Microsoft SQL Server Analysis Services as its underlying architecture, it is also a great add-on to anyone who’s committed to a Microsoft software stack, but needs an extra “oomph” in data visualization and collaboration functionality (although it can connect to and analyze data from any source including non-Microsoft data sources).

**Buyers should ensure they have access to a pool of local Panorama resources.** Panorama is a relatively small vendor; buyers should perform due diligence on the availability of local Necto resources.

› **Information Builders challenges Agile BI vendors with InfoAssist and InfoDiscovery.** Information Builders, a market leader in enterprise BI with a highly scalable WebFOCUS platform, enters the Agile BI market with two products: InfoAssist and InfoDiscovery. InfoAssist is a business user tool for creating analytical InfoApps, including InfoApps that use WebFOCUS Active Technology that allows for seamless (just pull the cord) offline operation by constantly caching HTML data behind the scenes. While InfoAssist relies on the WebFOCUS semantic model, InfoDiscovery will appeal to business users who just want to pull and analyze data from any source without having to go through the process of building a semantic model. Because both InfoDiscovery and InfoAssist use WebFOCUS metadata across the entire infrastructure, WebFOCUS Portal can assemble multiple InfoApps and InfoDiscovery built content into a single dashboard.
** Buyers should ensure they can access a pool of local WebFOCUS resources.** Even though Information Builders is a relatively large vendor with a global network of partners, large global enterprise buyers should still perform due diligence on the availability of local WebFocus resources.

› **IBM is bridging the Agile BI and cognitive computing gap with Watson Analytics.** IBM recently introduced Watson Analytics, a cloud-based governed data discovery platform. Sharing cognitive elements with Watson technology, Watson Analytics aims to overcome the skills gap that often makes data exploration and analysis inaccessible to non-experts. It provides features such as a natural language processing (NLP) interface that is used for the following: to locate the most relevant data; for semantic and statistical analysis of the data to ensure intuitive and relevant visualizations; for prebuilt analytic functions — from forecasting algorithms to filters — that are surfaced without any technical jargon and presented to the user in plain business language; for automatic detection of important relationships in the data, through advanced analytics; and to surface insights and encourage further exploration.

Use Watson Analytics for specific apps, not (yet) as a full enterprise BI platform. IBM Watson Analytics is a growing and evolving product with continuous delivery of new capabilities such as integration with IBM DataWorks and Cognos. However, at the time of this evaluation, it had limitations, such as connectivity to only one data source at a time and no full-client software, which limit Watson Analytics’ functionality in an offline mode. For large enterprise deployments, complement Watson Analytics with the next release of IBM Cognos (not evaluated in this Wave evaluation). IBM Cognos has been redesigned for Agile BI and uses built-in Watson-based intelligence to help access and shape all types of data and author and share content over an enterprise BI and analytics platform. It uses automated modeling and shares an intuitive dashboarding experience with Watson Analytics.

› **Birst offers cloud-based Agile and large enterprise grade BI with exclusive features.** In addition to crossing most of the t’s and dotting most of the i’s of self-service Agile BI and data visualization, Birst offers a few truly unique features. First, Birst can automatically generate a dimensional model reducing the need for expensive, highly trained data modelers. Next, Birst’s underlying ROLAP — not unique in the enterprise BI landscape, but seldom seen in the Agile BI platforms — has declarative capabilities that support metadata and data reuse versus building siloed applications and includes large enterprise performance enhancing capabilities like multitiered caching and aggregate awareness. Last but not least, unlike other cloud-based solutions, Birst does not require all data to be moved to cloud. Instead, Birst can directly query data on premises and combine it with analytic-ready data in the Birst cloud via query federation that supports a combination of hybrid cloud plus on-premises deployment scenarios.

**Buyers should ensure they have access to a pool of local Birst resources.** Birst is still a relatively small vendor so large global enterprise buyers should also perform due diligence on the availability of local Birst resources in case they are looking to use Birst as a BI development PaaS.
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Learn more about inquiry, including tips for getting the most out of your discussion.

**Analyst Advisory**
Put research into practice with in-depth analysis of your specific business and technology challenges. Engagements include custom advisory calls, strategy days, workshops, speeches, and webinars.

Learn about interactive advisory sessions and how we can support your initiatives.

Supplemental Material

**Online Resource**
The online version of Figure 4 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

**Data Sources Used In This Forrester Wave**
Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

› **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

› **Product demos.** We asked vendors to conduct demonstrations of their product’s functionality. We used findings from these product demos to validate details of each vendor’s product capabilities.

› **Customer reference surveys.** To validate product and vendor qualifications, Forrester also surveyed a total of 29 of the vendors’ current customers.
The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don’t fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to http://www.forrester.com/marketing/policies/forrester-wave-methodology.html.

Forrester’s Business Technographics® Global Data And Analytics Survey, 2014, was fielded to 1,658 business and technology decision-makers located in Australia, Brazil, Canada, China, France, Germany, India, New Zealand, the UK, and the US from SMB and enterprise companies with 100 or more employees. This survey is part of Forrester’s Business Technographics and was fielded from January 2014 to March 2014. ResearchNow fielded this survey on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates. We have provided exact sample sizes in this report on a question-by-question basis.

Forrester’s Global Business Technographics Data And Analytics Survey, 2015, was fielded from January through March 2015 of 3,005 business and technology decision-makers located in Australia, Brazil, Canada, China, France, Germany, India, New Zealand, United Kingdom and United States from companies with 100 or more employees.

Forrester’s Business Technographics provides demand-side insight into the priorities, investments, and customer journeys of business and technology decision-makers and the workforce across the globe. Forrester collects data insights from qualified respondents in 10 countries spanning the Americas, Europe, and Asia. Business Technographics uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.
Integrity Policy

All of Forrester’s research, including Forrester Waves, is conducted according to our Integrity Policy. For more information, go to http://www.forrester.com/marketing/policies/integrity-policy.html.

Endnotes

1 These are estimates based on ranges and are not exact. Source: Forrester’s Global Business Technographics Data And Analytics Survey, 2015.

2 In Forrester’s 60-criteria evaluation of enterprise business intelligence (BI) platform vendors, we identified the 11 most significant software providers and researched, analyzed, and scored their current market offerings. This report details our findings about how well each vendor fulfills Forrester’s evaluation criteria and where they stand in relation to each other to help application development and delivery (AD&D) professionals select the right vendor for their enterprise BI platform. See the “The Forrester Wave™: Enterprise Business Intelligence Platforms, Q1 2015” Forrester report.

3 Forrester has created a pragmatic tool clients can use to categorize and shortlist the large BI market based on specific needs. See the “Forrester’s 10-Step Methodology For Shortlisting Business Intelligence Vendors” Forrester report.

4 Business intelligence (BI) must keep evolving, improving, and adapting to key business agility trends in the age of the customer. Its next evolution? Systems of insight. This report connects the dots between our research on BI, Agile BI, and big data; proposes best practices for merging previously separate efforts into a more cohesive system of insight strategy; and offers actionable advice for AD&D pros working on BI and big data initiatives on supercharging BI and upgrading to 21st-century systems of insight. See the “It’s Time To Upgrade Business Intelligence To Systems Of Insight” Forrester report.

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