

The Forrester Wave™: Cloud Business Intelligence Platforms, Q4 2015

Fifteen Solutions Demonstrate The Diversity Of Choices Available To Enterprises

by Martha Bennett

December 11, 2015

Why Read This Report

In Forrester's 16-criteria evaluation of cloud business intelligence (BI) platform vendors, we identified the 15 most significant vendors — 1010data, Adaptive Insights, Bime Analytics, Birst, GoodData, IBM, Microsoft, MicroStrategy, Oracle, Rosslyn Analytics, Salesforce, SAP, SAS, Tableau Software, and TIBCO Software — in the category and researched, analyzed, and scored them. This report details our findings to help application development and delivery (AD&D) professionals select the right solution for their cloud BI strategy.

Key Takeaways

Cloud BI Choices Abound With Three Leading Vendors And 12 Strong Competitors

Forrester's research uncovered a market in which Birst, GoodData, and 1010data lead the pack. Oracle, SAS, Bime Analytics, Tableau Software, Microsoft, IBM, Rosslyn Analytics, Salesforce, SAP, Adaptive Insights, TIBCO Software, and MicroStrategy offer competitive options.

The Cloud BI Market Is Growing As AD&D Pros Look For Business Agility And Speed To Value

Increasing numbers of AD&D professionals see cloud BI as a way to address one of their top challenges: to provide agile self-service BI solutions that deliver business value quickly. For some, the move to cloud BI is part of a wider cloud strategy; others see it as an opportunity to augment existing in-house capabilities without adding resources.

Agility Combined With Enterprise Features Is The Key Differentiator In The Cloud BI Market

As traditional on-premises enterprise BI solutions no longer meet the needs of all stakeholders, cloud delivery provides a powerful alternative in terms of agility and speed of deployment. Vendors that combine the advantages of cloud delivery with enterprise BI features offer optimal platforms to their customers.

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Forrester conducted vendor briefings and product demos as well as an online survey of reference customers between May and July 2015.

Related Research Documents

[Brief: BI And Analytics In The Cloud — What The CIO Needs To Know](#)

[The Forecast For Business Intelligence Is Partially Cloudy](#)

[The Forrester Wave™: Agile Business Intelligence Platforms, Q3 2015](#)

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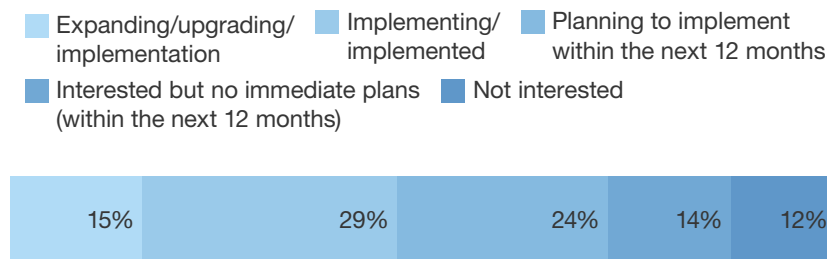
Business Intelligence In The Cloud: Not If, But When

The right data for the right person at the right time: The ability to take action based on up-to-date, data-driven insight rather than gut feeling or last week's report is increasingly important to decision-makers at all levels in an organization, regardless of their role. Traditional approaches to business intelligence (BI) delivery frequently fail to meet business needs in terms of agility and speed.

As a result, business and technology professionals are increasingly looking to cloud deployment options to obtain the required BI capabilities in a more flexible manner. Only 12% of the respondents in Forrester's Global Business Technographics® Data And Analytics Survey, 2015 stated that they have no interest in using cloud services for enterprise BI, while 44% are already using and/or expanding BI cloud solutions within their companies (see Figure 1). Anecdotal evidence suggests that even in countries traditionally more hesitant about applications delivered via the cloud, AD&D professionals' attitude has shifted from talking about cloud BI in terms of "if" to regarding it as an inevitable component of their application landscape that will appear sooner rather than later.

FIGURE 1 By Mid-2016, Nearly Three-Quarters Of Companies Will Use Cloud BI Solutions

"What are your firm's plans to use cloud services to complement or replace your BI capabilities?"
(Enterprise or corporate BI)



Base: 1,805 global data and analytics technology decision-makers

Note: "Don't know" responses not shown.

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

The Advantages Of Cloud BI Outweigh The Risks And Potential Downsides

Two words sum up the top five reasons consistently cited as the key benefits of choosing a cloud BI solution: "speed" and "agility." These advantages, combined with the understanding that it's impossible to replicate the same benefits with a traditional on-premises solution, are the reason why technology management and business professionals alike look at the risks associated with cloud BI (whether real or perceived) as something that can be managed. Specifically, we note that:

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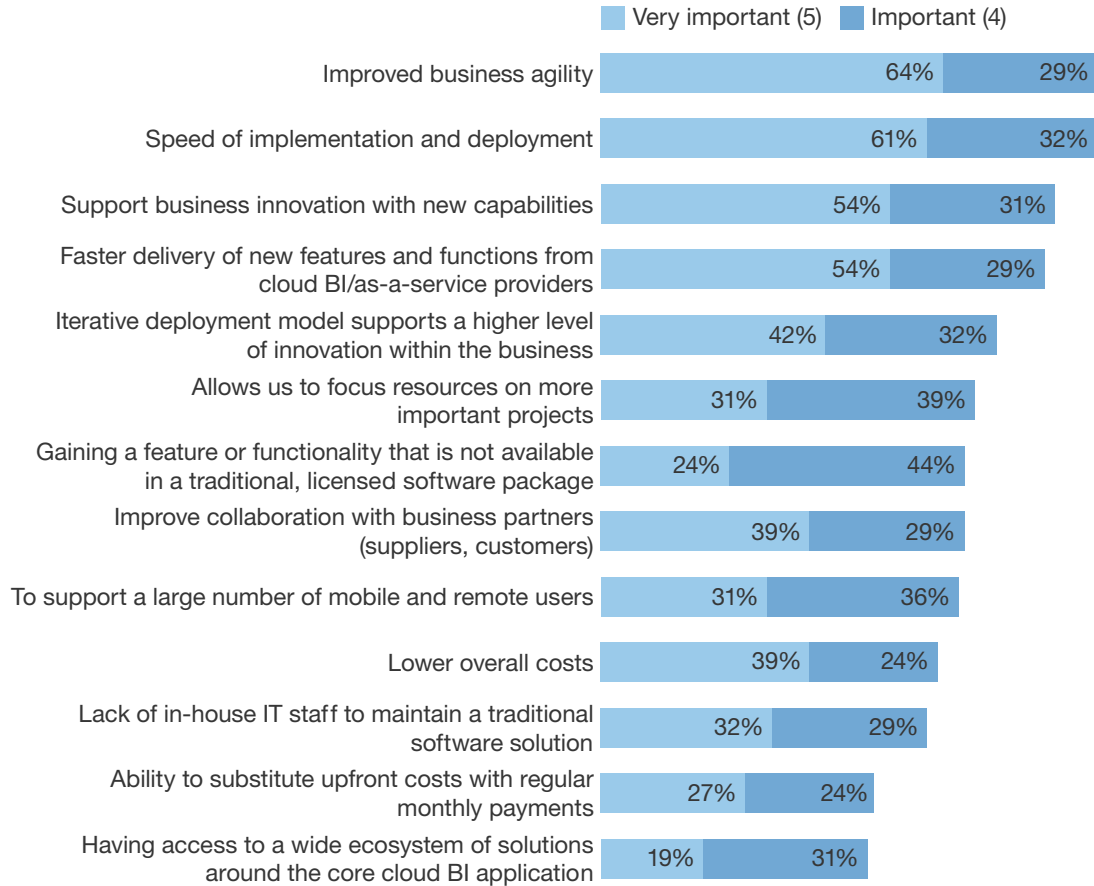
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- › **Improved business agility tops the list of benefits expected from cloud BI.** The ability to have a BI application up and running very quickly, as opposed to having to wait weeks or even months for hardware and software to be installed, is key. But it's also important to have new features and functions available to business users immediately, without any need for support from AD&D professionals, in particular because new capabilities often support business innovation. Other highly rated benefits include improved collaboration, the opportunity to make BI capabilities available without having the required skills available in-house, and the ability to support large numbers of mobile and remote users (see Figure 2).¹
- › **Security and compliance top the list of potential issues.** In many ways, it would be worrying if this wasn't the case, as companies rightly need to be concerned about the security of their data and compliance with applicable laws and regulations. That said, many AD&D professionals will quietly admit that they have greater confidence in the security capabilities of a top-tier cloud provider, as their own organizations would most likely not be able to afford to employ the same level of expertise. Security and compliance aside, there are concerns around application performance; integration and transition to cloud are also regarded as challenging and potentially risky, but only by a minority of companies that have chosen cloud BI (see Figure 3).²
- › **Cost and pricing models appear on both the list of benefits and the list of concerns.** Many see lower overall cost as a benefit, even though it isn't as high on the priority list as the advantages associated with agility and speed. Another factor in favor of cloud BI is the ability to substitute upfront cost with monthly payments. At the same time, cloud BI customers are concerned that the total cost of a cloud solution will actually be higher than a traditional software license plus maintenance after a number of years. However, it's hard to come up with a true cost comparison that takes into account all factors, including hardware, software, and total operational cost as well as business benefits such as speed and agility. Many also feel that pricing is unclear or complicated.

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FIGURE 2 Speed And Agility Are The Most Highly Rated Benefits Of Cloud BI

“How important were the following benefits in your firm’s decision to choose a cloud BI solution?”
 (4 or 5 on a scale of 1 [not important] to 5 [very important])

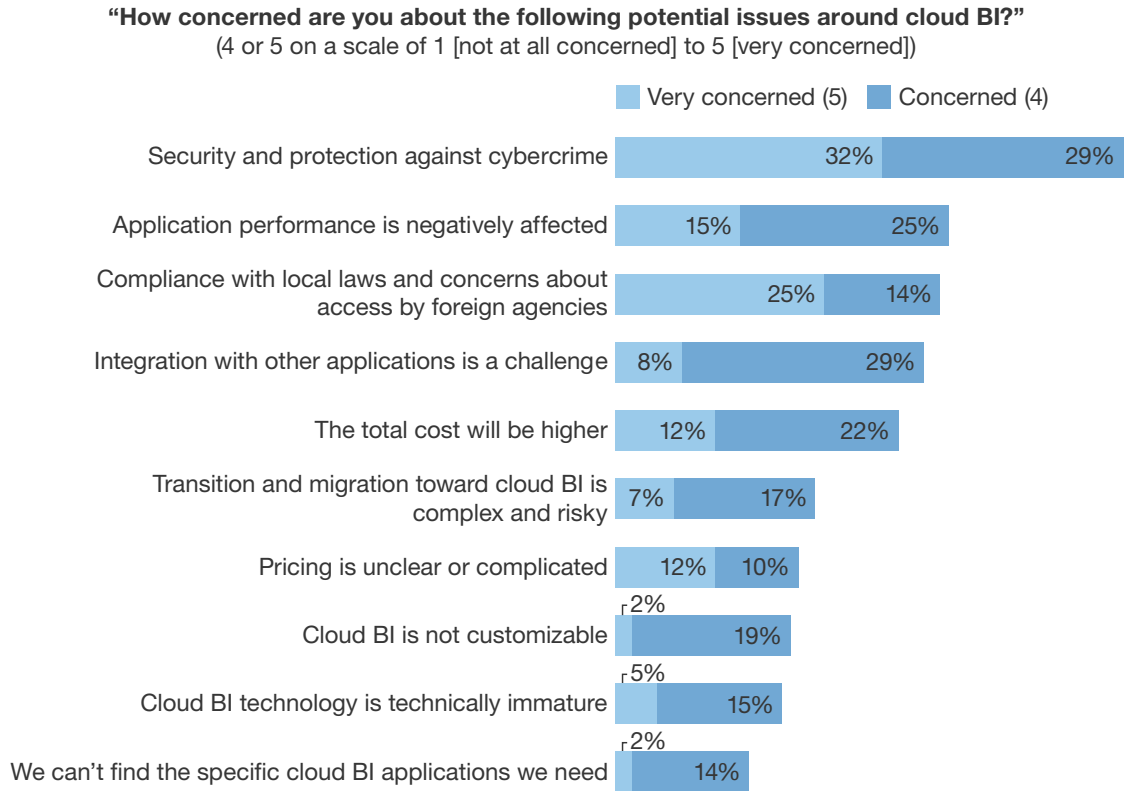


Base: 59 customers of the vendors evaluated

Source: Forrester’s Q3 2015 Global Cloud Business Intelligence Platforms Customer Reference Online Survey

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FIGURE 3 Security And Protection Against Cybercrime Top The List Of Concerns About Cloud BI



Base: 59 customers of the vendors evaluated

Source: Forrester's Q3 2015 Global Cloud Business Intelligence Platforms Customer Reference Online Survey

BI In The Cloud Isn't An All-Or-Nothing Choice

Technology leadership teams are pursuing a number of different strategies when it comes to BI in the cloud. Some have chosen a cloud-only strategy for all their application delivery (including BI); typically, their organizations were born in the Internet era, and they saw on-premises technology deployments as a necessary but unwanted option, to be replaced as soon as a viable cloud service was available. Others are looking for cloud services to put in place a “real” BI solution for the first time, replacing a hodgepodge of spreadsheets and other homegrown solutions. For many, BI in the cloud augments an existing solution. In some cases, it's to extend its reach; in other cases, it's with a view, over time, to replace what's perceived as an outdated BI environment.

Whatever the motivations for turning to the cloud for BI capabilities, in order to select the most appropriate cloud BI platform, AD&D professionals need to be clear about what they're looking for in terms of cloud delivery, in addition to assessing the actual BI functions. You should:

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- › **Map your needs and expectations to the actual vendor cloud model.** “Cloud” BI means different things to different people. From an enterprise perspective, for some, only solutions featuring a true multitenancy architecture qualify; for others, the emphasis is purely on not having to deploy and manage a solution in their own data centers. With many vendors, it’s not easy to understand at first glance whether they’re offering a true multitenant environment, a multitenant-capable solution, or single-tenant software. Hence, it’s crucial that AD&D professionals understand in detail how a particular solution is hosted and match this against their needs and expectations in terms of “cloud” delivery.³
- › **Consider hybrid models to combine on-premises solutions and cloud BI.** Running BI in the cloud doesn’t have to mean loading all of your data into the cloud. Many cloud BI platforms support hybrid models, which fall into two main categories: 1) the ability to bring data from an on-premises data source straight into the BI environment without first having to load it into a cloud data warehouse or other cloud data store associated with the cloud BI app and 2) the ability to push a query into an on-premises database or data warehouse and bring only the results back into the cloud. In the case of augmenting an existing BI environment with a cloud option from the same provider, it’s key to ascertain how easy it is to migrate between on-premises and cloud, should this be a requirement.
- › **Make sure your regulatory and compliance requirements are satisfied.** Cloud BI providers increasingly recognize the need to support their customers’ compliance and data sovereignty requirements. How this translates into practice differs between providers, and AD&D professionals need to work closely with their colleagues in risk and compliance to assess whether what’s on offer is adequate. Very importantly, all those involved in the decision need to understand that the more stringent the requirements are regarding data location and access to the platform, the higher the price is likely to be.⁴
- › **Check your requirements and the vendor’s capabilities to support offline mode.** While it’s increasingly taken for granted that connectivity is available when needed, it’s not a given; additionally, there are environments where wireless signals of any kind are prohibited. Not all providers of cloud BI solutions offer capabilities for offline data viewing, manipulation, and analysis. Equally, for some enterprises, such a feature doesn’t matter; for others, it’s a dealbreaker.⁵

There’s A Plethora Of Solutions Available

In addition to the cloud BI platforms featured in this evaluation, there are many other vendors that offer BI in the cloud, either directly or via partners. These include:

- › **Cloud BI vendors focusing on a specific function.** It’s beyond the scope of this report to go into the wide range of marketing analytics solutions available in the cloud. A less well-served function is supply chain, where FusionOps has carved itself a niche with a powerful supply chain intelligence cloud platform. Using supply-chain-specific data models, it provides actionable insights; predictive and prescriptive analytics are also included. Clients have gained additional benefits from their

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deployments through using the FusionOps cloud data store as the source of trusted data for other analytics applications. As this Forrester Wave focuses on generic cloud BI platforms, we did not include vendors focusing on specific industries or functions.

- › **Vendors not offering cloud BI directly but whose solution is cloud-capable.** An example in this category would be Yellowfin, whose web-based architecture lends itself to cloud delivery. The software is available on the AWS Marketplace and as a cloud service via partners. Other BI providers with solutions suitable for cloud delivery include (but aren't limited to) arcplan, Looker Data Sciences, and SiSense, as well as open source BPM-Conseil and Pentaho. We did not consider these and similar vendors for inclusion in this Forrester Wave because customers themselves or third-party providers install and run the software in the cloud.
- › **Vendors with partial cloud offerings.** Examples to note in this context are Alteryx and Qlik Tech International. The Alteryx Analytics Gallery supports the secure sharing and consumption of analytic apps in the cloud, and Alteryx can leverage cloud data sources. Qlik Sense Cloud allows users to create and upload Qlik Sense Apps; these are interactive, optimized for each device they run on, and can be shared with up to five other people. We did not include Alteryx and Qlik in this evaluation, as they are not offering a complete BI solution in the cloud.
- › **Cloud BI offerings that were launched after the cutoff point for this evaluation.** These include Amazon QuickSight, Board International's Board 10 release, and OpenText (Actuate Big Data Analytics, Cloud Edition).⁶
- › **Additional cloud BI vendors not included in this evaluation.** There are also a number of companies Forrester tracks but which we were unable to include in this Forrester Wave due to not meeting the necessary criteria in terms of market presence or Forrester client interest. These include Chartio, DataHero, Domo, Klipfolio, and Matillion.

Cloud BI Platforms Evaluation Overview

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

Evaluation Criteria: Current Offering, Strategy, And Market Presence

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 16 criteria, which we grouped into three high-level buckets:

- › **Current offering.** We assessed each vendor's current offering in terms of cloud delivery (including the ability to support hybrid models and disconnected mode, as outlined above) and key security features, as well as the main capabilities expected of an enterprise BI solution such as reporting, analytics, self-service, automated features, visualization, mobile delivery, and BI on BI.

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- › **Strategy.** We reviewed each vendor's strategy and considered how well each vendor's plans for product enhancement match the eight key cloud BI trends Forrester has identified.⁷ We also looked at the resources the company devotes to R&D activities in support of its strategy.
- › **Market presence.** In this research, we considered a number of factors as a measure of global market presence. These include vendor BI revenues and number of (paying) customers, as well as a vendor's overall size and its physical presence (sales and/or development sites) outside of its home territory.

Evaluated Vendors All Offer Comprehensive BI Solutions In The Cloud

Forrester included 15 vendors in the assessment: 1010data, Adaptive Insights, Bime Analytics, Birst, GoodData, IBM, Microsoft, MicroStrategy, Oracle, Rosslyn Analytics, Salesforce, SAP, SAS, Tableau Software, and TIBCO Software (see Figure 4). Each of the evaluated solutions is:

- › **Available as a standalone BI platform.** The solution is not embedded in another application or offered only in conjunction with another application (e.g., CRM, ERP).
- › **A generic BI platform.** The solution is not focused on a specific vertical (e.g., financial services or manufacturing) or business function (e.g., supply chain or marketing); it must be able to ingest and analyze data from multiple sources, not just a single application or data source.
- › **Able to provide all the key capabilities of a complete BI solution.** These capabilities include reporting, analytics, self-service, automation, data visualization, and mobile delivery.
- › **Offered in the cloud, on either a software-as-a-service or managed services basis.** The hosting platform can be private data centers, colocation facilities, or public cloud.
- › **Provisioned and managed by the vendor itself.** The solution is not managed by a third party.
- › **Generally available no later than May 2015.** The vendor had to have live customers in production (i.e., beyond pilot projects) as of May 2015. The vendor's customer base has to include large enterprises, in production. Capabilities included in the evaluation had to be available by July 31, 2015.

Finally, when selecting the vendors for inclusion in this evaluation, we also took into account their market presence and the frequency with which they are mentioned in the context of inquiries.

This evaluation of the cloud BI market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool. In addition, we encourage clients also to consider other vendors, such as those listed in this document but not included in the detailed evaluation.

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FIGURE 4 Evaluated Vendors: Product And Version Information

Vendor	Product evaluated	Product version evaluated
1010data	1010data	8.X
Adaptive Insights	Adaptive Discovery Enterprise	2015.1
Bime Analytics	Bime	6
Birst	Birst	5.19
GoodData	GoodData	GoodData 102.14
IBM	IBM Cognos Business Intelligence	10.2.2
Microsoft	Power BI	July 2015
MicroStrategy	MicroStrategy Secure Cloud Enterprise	July 2015
Oracle	Oracle Business Intelligence Cloud Service (also known as OBICS)	July 2015
Rosslyn Analytics	RAPid Cloud Analytics Platform	8.19
Salesforce	Salesforce Analytics Cloud (Wave Analytics and Salesforce Reports & Dashboards)	Summer 2015
SAP	SAP BusinessObjects Business Intelligence (deployed on SAP Hana Enterprise Cloud [HEC])	4.1
SAS	SAS Visual Analytics	7.3
TIBCO Software	TIBCO Spotfire Cloud Enterprise	7.0

Cloud BI Is A Market With A Wide Variety Of Choices

The evaluation uncovered a market in which (see Figure 5):

- › **Birst, GoodData, and 1010data lead the pack.** All three offer solutions that were architected from the ground up as multitenant cloud BI solutions, with the goal to provide pervasive access to data and analytics, regardless of the data location or the role of the user, and without requiring the type of internal technology support typically associated with an enterprise BI deployment. But that's where the similarities end. The three Leaders not only differ in the detail of the capabilities they offer, they also position themselves differently from a strategic perspective.
- › **Twelve other vendors offer competitive options.** Oracle, SAS, Bime Analytics, Tableau Software, Microsoft, IBM, Rosslyn Analytics, Salesforce, SAP, Adaptive Insights, TIBCO Software, and MicroStrategy all have comprehensive cloud BI solutions. Some are “born-in-the-cloud” companies

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focusing on BI from the start; others are cloud players that have added BI to their solution portfolio. Some of the established BI providers have expanded or extensively re-engineered their portfolio to put cloud delivery first; others are more focused on the existing on-premises product but at the same time want to ensure that customers have a choice of deployment options.

FIGURE 5 Forrester Wave™: Cloud Business Intelligence Platforms, Q4 '15



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FIGURE 5 Forrester Wave™: Cloud Business Intelligence Platforms, Q4 '15 (Cont.)

	Forrester's Weighting	1010data	Adaptive Insights	Bime Analytics	Birst	GoodData	IBM	Microsoft	MicroStrategy	Oracle	Rosslyn Analytics	Salesforce	SAP	SAS	TIBCO Software
CURRENT OFFERING	50%	3.66	2.81	3.20	4.51	3.81	3.38	3.59	3.18	3.74	2.92	2.62	3.13	3.34	3.24
Cloud delivery	35%	3.79	3.19	2.93	4.83	3.53	3.02	3.62	2.59	3.88	2.76	2.93	2.97	2.41	3.19
Security and compliance	8%	2.88	3.46	3.37	4.81	4.13	3.56	1.73	3.94	3.56	3.65	3.85	3.56	4.04	3.27
Data access and integration	13%	4.00	2.00	4.00	5.00	4.00	4.00	5.00	3.00	4.00	3.00	1.00	3.00	4.00	3.00
Technical architecture	5%	4.21	3.95	4.21	4.74	4.47	3.68	3.68	3.68	4.21	3.42	3.95	4.08	4.47	3.42
Reporting	2%	4.42	2.76	3.46	4.42	3.46	4.49	4.29	4.23	4.10	3.53	2.56	4.42	4.17	4.01
Analytics	5%	3.63	1.67	1.79	4.05	2.86	4.88	4.40	3.93	3.45	3.75	1.79	3.45	4.76	3.81
IT-enabled self-service	4%	4.52	2.14	3.57	4.76	4.76	3.81	2.62	4.52	4.40	3.33	3.10	2.38	3.69	3.45
Business user self-service	5%	3.85	2.34	3.65	4.17	3.49	2.71	4.06	2.97	4.22	3.13	2.76	2.29	3.18	3.70
Automating BI	5%	3.00	1.50	1.50	3.25	3.63	1.25	3.13	1.75	2.38	2.25	1.50	1.75	2.88	2.63
Data visualization	5%	2.37	1.45	3.29	3.88	3.62	3.75	3.09	2.37	2.89	1.91	1.58	3.03	4.08	3.68
Mobile	6%	2.40	2.90	2.60	3.70	3.70	3.00	2.60	4.80	2.80	2.00	3.33	4.10	3.70	2.50
BI on BI	4%	4.38	3.96	3.96	3.33	4.79	3.54	3.33	3.54	3.65	2.40	1.46	3.13	2.08	2.71
Client feedback	3%	4.85	4.75	4.50	4.85	4.75	4.65	4.50	4.50	4.85	4.25	4.85	4.50	5.00	4.50
STRATEGY	50%	3.91	2.90	3.44	4.47	3.91	3.03	2.99	2.25	3.22	3.44	3.35	2.63	3.41	2.34
Commitment	40%	4.38	3.75	4.38	4.38	4.38	3.13	3.02	1.88	3.13	4.38	4.38	1.88	3.13	1.88
Vision and strategy	60%	3.59	2.34	2.81	4.53	3.59	2.97	2.97	2.50	3.28	2.81	2.66	3.13	3.59	2.65
MARKET PRESENCE	0%	4.00	4.00	4.00	4.00	3.00	1.00	5.00	1.00	4.00	2.00	3.00	3.00	1.00	1.00
Market presence	100%	4.00	4.00	4.00	4.00	3.00	1.00	5.00	1.00	4.00	2.00	3.00	3.00	1.00	1.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Vendor Profiles

Leaders

- › **Birst leads with an enterprise-grade cloud BI solution that supports hybrid scenarios.** From the start, Birst has focused on providing a full-stack BI platform that meets enterprise-grade BI requirements while at the same time supporting agility and business user self-service. With its “networked BI” capability, Birst comes close to the ideal of a “single version of the truth” with one corporatewide semantic layer. The solution supports centralized governance while allowing business units and individuals freedom via the use of “virtual spaces.” Via the same governance layer, Birst also offers the ability to live-query on-premises data stores. Its “open client interface” allows customers to use alternative front ends, such as Excel or Tableau.⁸ It supports offline

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capabilities on mobile devices, and an appliance is available for deployment within corporate data centers. The solution is also attractive to ISVs and enterprises that want to embed BI capabilities in web portals and business applications.

To be aware of: Birst's enterprise pricing can be confusing, and some potential customers feel it's insufficiently transparent. While Birst provides 24x7 support and now has a presence in several European and Asia Pacific countries, it remains a comparatively small vendor.

- › **GoodData is unique with its “insights-as-a-service” offering.** GoodData offers a powerful solution for companies that want to have all of their BI capabilities in the cloud. In addition to its core analytics engine, GoodData offers an enterprise-grade “data pipeline” to ease the burden of preparing data for analytics (including schema creation and publishing the model to the analytics workspace). A key differentiator is GoodData's “insights-as-a-service” capability. Leveraging the insights gained from analyzing vast numbers of GoodData community interactions, this supports end users by suggesting what they might want to do next, based on their current actions. To set itself apart further, the company has pivoted to focus on helping customers unlock the value of their data by sharing and externalizing it via the GoodData platform. With engineering and operations in Prague, GoodData is well placed to meet European data privacy concerns. It is also an attractive option for ISVs and enterprises that want to embed BI in web portals and business apps.

To be aware of: GoodData doesn't support live querying of on-premises data sources, and there is no support for offline working. While GoodData has a significant presence in Europe, it remains a comparatively small vendor.

- › **1010data differentiates itself as a Leader with its ability to handle very large data sets.** Acquired by Advance/Newhouse in August 2015, 1010data was ahead of its time when it revealed the core of its “Trillion-Row Spreadsheet” back in 2000. Its ability to support data discovery at petabyte scale and integrating and analyzing disparate data from multiple sources continues to set it apart; its solid platform and governance capabilities have led a number of customers to adopt 1010data as their main BI platform, in some cases replacing existing data warehouses. 1010data's QuickApps framework supports the creation of end user applications, from simple results displays to complex dashboards and applications. Clients also appreciate the ease with which it is possible to securely share data and collaborate, both internally and externally; clients can easily augment their own data with a variety of data sets available through 1010data Facts, further aiding commercialization opportunities. 1010data also offers its solution as an appliance for on-premises deployment.

To be aware of: All data needs to be loaded into the 1010data data store before it can be queried, and while 1010data is supported on mobile devices, it doesn't offer any offline capability. At the time of this evaluation, 1010data was hosted only in US locations; a facility in Germany has since gone live and is in use. While 1010data provides 24x7 support, it doesn't have a physical presence outside of the US.

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Strong Performers

- › **Oracle has become a key cloud BI player.** With Oracle Business Intelligence Cloud Service (OBICS), Oracle pivoted to a “cloud-first” strategy for business intelligence and re-engineered its core BI platform to be multitenant, with update frequencies comparable to “native” cloud vendors. Furthermore, the move to cloud went hand in hand with the goal to enable business agility. Anybody who thinks that OBICS is “just” Oracle Business Intelligence Enterprise Edition (OBIEE) in the cloud should think again: With OBICS, Oracle introduced visual discovery, freeform exploration, and data-blending capabilities considerably beyond what’s historically been available in OBIEE. OBICS offers enterprise-grade data integration options as well as a web-based file loader aimed at end users. Potential customers with data sovereignty requirements not covered by OBICS running in Oracle’s data centers in the US (commercial and federal) and the Netherlands should check with Oracle, as there are plans to run OBICS in more of the company’s 17 data centers, if customer demand warrants it.

To be aware of: OBICS doesn’t yet offer complete support for hybrid cloud/on-premises scenarios, and it only partially supports offline working on mobile devices. Enterprises requiring pixel-perfect reporting need to procure BI Publisher separately. Customers with data volumes exceeding the data storage and transfer limits (50 GB per instance and 300 GB per month, respectively) of the core OBICS offering should discuss options with Oracle.

- › **SAS broadens access to its leading BI and analytics capabilities via the cloud.** As a long-established global leader in advanced analytics, SAS needs no introduction. By making Visual Analytics available in the cloud, SAS has extended the reach of its highly rated Agile BI platform.⁹ Visual Analytics runs on top of the in-memory SAS LASR Analytic Server; this can be scaled horizontally by adding nodes, hence making the environment suitable for big data analytics requirements. Offline working is supported via SAS Mobile BI and SAS Office Analytics; the former is free of charge, while the latter requires a separate license. SAS offers a variety of options to suit different needs, ranging from standard software-as-a-service (SaaS) provision to highly customized managed services. SAS runs Visual Analytics in its own data centers as well as third-party colocation facilities and public cloud, in order to meet customers’ data location requirements. Customers of SAS Visual Analytics in the cloud reported the highest satisfaction rates in our survey.

To be aware of: At the time of this evaluation, SAS continued to introduce new features and functions first to the on-premises version of the product, only making them available in the cloud once they have been tried and tested. This approach may change in the future, starting in 2016. An often-heard complaint is the lack of transparency in SAS’ pricing. It should be noted, though, that Visual Analytics for SAS Cloud can be purchased through the SAS Store and pricing is public.

- › **Bime Analytics distinguishes itself with direct connections to many data sources.** Architected for SaaS-based, multitenant cloud delivery from the beginning, Bime’s solution is centered on providing data-savvy business users and data scientists alike with direct access to data wherever it resides. Its main distinguishing feature is the 50-plus out-of-the-box connectors to online and

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on-premises data sources, which enable users to analyze and blend data straightaway; a library of visualizations facilitates fast creation of dashboards that can be shared as well as embedded in portals and web pages. Bime can support analytics at scale, with some customers running queries against billions of rows. Bime offers several storage choices, but these are optional; customers wanting to leave all data in its original location — on-premises or in the cloud — can do so. If required, SQL queries can be pushed into source databases. Bime's strong focus on usability also extends to mobile delivery. The company was acquired by Zendesk in October 2015.

To be aware of: Bime can only be used in connected mode, including on mobile devices. The lack of discrete data cleanup and preparation tools makes it more likely that Bime Analytics is a supplementary BI tool rather than an organization's primary BI environment. Bime's development team is located in France, and the software is hosted in the US; customers requiring other hosting locations should discuss their requirements with Bime.

- › **Tableau Online has gained traction very quickly.** Tableau is a recognized market leader in self-service data visualization, hence it's not surprising that the hosted, SaaS-based version of Tableau Server — Tableau Online — has proved a popular addition to the company's portfolio since it was launched in July 2013. Not that Tableau was a newcomer to cloud delivery: With its Tableau Public offering, available since February 2010, Tableau had already gathered experience running its environment in the cloud. In 2015, the upgrade to version 9 provided faster performance and additional data connections, both on-premises and in the cloud. While attractive to customers wanting to share dashboards outside their firewall or embed them into other cloud applications, Tableau Online (which includes Data Server) offers a complete Agile BI environment suitable for enterprises not wanting to maintain this type of application in-house. Access on mobile devices is offered via native apps for iOS and Android as well as HTML5-capable browsers.

To be aware of: Tableau Online doesn't offer the complete Tableau experience in the cloud — desktop is still needed to create dashboards. While Tableau Online has a 100 GB limit on storage, it also supports direct connections to other cloud data stores. Tableau's mobile capabilities support snapshots but not interactive offline working. At the moment, Tableau Online is hosted only in the US (Tableau's own data centers), but Tableau is planning to open data centers in Europe as well.

- › **Microsoft Power BI provides a powerful incentive to consider BI in the cloud.** Microsoft needs no introduction in a BI context, with Excel having for decades been the most commonly used BI self-service tool and the Microsoft BI stack consistently featuring among the Leaders in Forrester Wave evaluations of enterprise BI platforms.¹⁰ With Power BI, Microsoft has released a cloud solution that not only leverages existing Microsoft BI on-premises stack components (e.g., SQL Server) but also features leading Agile BI capabilities; by removing the dependency on Office 365 and SharePoint, Microsoft has further increased the attractiveness of Power BI.¹¹ Aside from the Analysis Services Connector to on-premises data, Microsoft offers a Personal Gateway for Power BI, which allows users to keep their reports and dashboards in sync with on-premises data; it has

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added a number of “content packs” since we conducted this evaluation. Acquisition cost is low, and Microsoft provides a fast path to value by continuously adding prebuilt connectors to popular on-premises and cloud data sources. Native mobile apps are available for Windows, iOS, and Android.

To be aware of: Microsoft works on the assumption that enterprises using Microsoft as their main enterprise BI environment prefer a hybrid solution, with Microsoft Analysis Services running on-premises and accessed via Power BI from the cloud. A cloud-only solution is available. Some data preparation and creation of rich, interactive reports may require desktop tools (either Microsoft Excel or Power BI Desktop). Power BI features 3D map visualization, but Power Map is not available in Power BI. Offline working is not fully supported in the mobile apps.

- › **IBM has cloud-enabled Cognos, its leading enterprise BI platform.**¹² With Cognos Business Intelligence on Cloud, IBM provides customers with a managed services option, based on the same code as the on-premises software. A variety of preconfigured setups are available; customers can easily move between these, as well as between cloud and on-premises deployment of Cognos (licenses are portable). With its ownership of SoftLayer, IBM has control over the complete stack and can offer a variety of options to clients with very stringent security requirements. IBM also supports a hybrid model, allowing on-premises data sources to be directly connected via VPN. It is also possible to push queries into on-premises databases and link to any cloud-based relational data source. When we conducted this evaluation, IBM’s main focus for Cognos was on IT-enabled self-service; IBM has since enhanced the platform with a range of Agile capabilities to support business user self-service, added a browser-based modeling interface, and renamed the product Cognos Analytics.

To be aware of: While Cognos Business Intelligence on Cloud has a browser-based interface, a desktop client is required to build the semantic layer and create models. IBM’s offering doesn’t include a data warehouse; clients requiring a cloud data store can subscribe to dashDB or discuss a hosted option with IBM. At the moment, Cognos Business Intelligence on Cloud runs in SoftLayer data centers in the US and the UK; clients requiring other locations are encouraged to discuss their requirements with IBM.

- › **Rosslyn Analytics empowers business users to make sense of complex data sets.** The key differentiator of Rosslyn Analytics’ RAPid Cloud Analytics platform is hidden under the covers. RAPid makes it as simple as possible for the business expert to prepare complex and diverse data sets for analytics, without the IT support that’s typically required for data ingestion and cleanup tasks of this level of complexity. Rosslyn also has a strong focus on security, integrity, rigor, and compliance. Another differentiator is the ability to mix structured and unstructured queries (e.g., SQL and Elastic). Transparent to the user, data resides in different types of stores on the RAPid platform, dependent on data type. Taken together, these factors explain why Rosslyn’s typical buyer is part of a business department, often in finance; in some cases, RAPid is replacing mission-critical solutions. RAPid’s ability to handle flat or hierarchical associative dimensions makes it popular with legal firms, which use it to store contracts. A number of partners are building apps on top of the platform.

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To be aware of: All data needs to be loaded into the RAPid Cloud Analytics data store. RAPid's native data visualization capabilities are limited, but the company OEMs QlikView (fully cloud-enabled and operated by Rosslyn and included in the price); it's also possible, via APIs, to use other tools as a front end (e.g., Tableau). The platform is hosted on Azure, currently in the US and the UK. Rosslyn Analytics has offices in the UK and the US but remains a comparatively small vendor.

- › **Salesforce Wave Analytics is an impressive addition to the portfolio.** As the new kid on the BI and analytics block, Salesforce has made an impressive debut with Analytics Cloud and the underlying Wave platform. Wave Analytics starts where Salesforce1 reporting leaves off, allowing users to explore their data at speed, whether it's from a Salesforce source or another application, structured or unstructured. At its core is a modern infrastructure that supports key-value pair ingestion, massively parallel processing, and search-based exploration and that can operate at scale. Wave was the first of Salesforce's offerings to benefit from the new Lightning interface and visualization capabilities. It was designed "mobile first" and includes support for Apple Watch. But it's not just about data exploration and analytics dashboards: From within Wave, users can create tasks, update records, and collaborate with colleagues around the data. Salesforce Wave also serves as a platform for developing analytics apps; Salesforce and many partners are working on a range of apps for different business needs.

To be aware of: All data needs to be loaded into the Salesforce Analytics Cloud data store before it can be queried. Data from other Salesforce applications and flat files can be loaded directly, but there are no native data preparation or ETL capabilities; instead, Salesforce relies on a range of partners to provide these functions. Mobile delivery is limited to iOS at the moment.

- › **SAP offers customers flexibility by putting BusinessObjects in the cloud.** With BusinessObjects BI on SAP Hana Enterprise Cloud (HEC), SAP provides an option for customers who want a complete enterprise-grade BI stack in the cloud, as well as those who've already modernized Business Warehouse by moving onto Hana. The solution is hosted on a single-tenant basis and can hence be deployed in any of SAP's global data centers; this makes it suitable for customers whose stringent security and data residency requirements would otherwise mitigate against running BI in the cloud. BusinessObjects Mobile provides native clients for iOS and Android tablets and phones and supports offline capabilities. SAP is working on modernizing key elements of the platform by leveraging Hana. Since we conducted the evaluation, SAP has added a new offering to the stable — Cloud for Analytics, which combines planning, BI, predictive analytics, and risk management in a single SaaS product while also featuring strong self-service capabilities.

To be aware of: SAP's lineup of BI tools can come across as confusing; with the rollout of the new offering (Cloud for Analytics), SAP will have to clarify how to make existing and new cloud-only and hybrid BI environments work together or what the transition paths are from one to the other.

- › **Adaptive Insights combines corporate performance management with BI.** Adaptive Insights was a SaaS pioneer, started in 2003 to offer corporate performance management software in the cloud.¹³ Its solution was engineered for multitenancy. With the launch of Adaptive Discovery

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in 2012, the vendor added more generic, standalone BI and data discovery capabilities to serve two needs: 1) to provide the traditional user — the finance department — with more analytics capabilities and 2) to extend the reach of up-to-date metrics and data-driven insights to other roles in the organization. The solution features a cloud data store and an integration layer (common to all Adaptive products) to provide a single version of the truth. Adaptive Discovery includes lightweight data preparation functions; for more demanding transformations, the company OEMs Kettle. Since we performed the evaluation, Adaptive has enhanced its data preparation capabilities and added a number of prebuilt integrations.

To be aware of: Kettle needs to be deployed on-premises. Adaptive Discovery doesn't support hybrid on-premises/cloud models; all data needs to be loaded into the Adaptive environment before it can be queried. Adaptive supports mobile delivery with a hybrid app for iOS and browser-based access on other tablets, but it does not support offline working. The solution is currently hosted in the US and the UK. Headquartered in the US, Adaptive Insights has offices in the UK, Australia, and Japan, but overall it remains a comparatively small vendor.

- › **TIBCO lightens the load for AD&D professionals with Spotfire Cloud Enterprise.** TIBCO Spotfire is a well-known, powerful Agile BI solution with advanced visualization and analytics capabilities, and its availability in the cloud was welcomed by clients and prospects keen to leverage its features without having to run the environment on-premises. Another differentiator is TIBCO's geospatial capabilities; aside from out-of-the-box integration with all leading GIS and mapping tools, Spotfire benefits from a rich set of integrated geoanalytics functions. Spotfire Cloud Enterprise supports direct connections to on-premises data sources and can also push queries into on-premises data stores. The solution is hosted on AWS; as it's deployed on a single-tenant basis, data residency requirements can be taken into account. In addition to Spotfire Cloud Enterprise, TIBCO also offers Spotfire Cloud on a SaaS basis; developers can leverage Jaspersoft in the cloud.¹⁴ In 2013, TIBCO moved to a "cloud-first" strategy and aims to make its entire BI and analytics portfolio more cloud-centric.

To be aware of: TIBCO Spotfire doesn't include any data integration or data quality functions. When deciding between TIBCO Spotfire Cloud Enterprise and TIBCO Spotfire Cloud, be aware that the former lacks some key cloud delivery features and that the desktop client is required for some of the more complex authoring functions. TIBCO Spotfire Cloud is a true SaaS offering but includes only a subset of features, not the full Spotfire platform.

- › **MicroStrategy offers custom-engineered cloud deployments.** MicroStrategy's organically grown architecture, powerful ROLAP engine, and Agile BI capabilities are key differentiators among established BI platforms. With MicroStrategy Secure Cloud Enterprise, customers can take advantage of this seamlessly integrated BI suite without having to install and maintain it. MicroStrategy carefully captures client requirements before configuring and making available the cloud environment; increasing use of automation aims to minimize setup time. MicroStrategy supports hybrid environments (i.e., data doesn't have to be loaded into the cloud before it can be

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queried). Its best-in-class mobile platform offers not only rich offline functions but also the ability to build custom apps. MicroStrategy offers its customers only dedicated instances in the cloud, but the environment supports multitenancy, which some OEMs are utilizing. For clients wanting to manage their own environment in the cloud, MicroStrategy is available on the AWS Marketplace.

To be aware of: A MicroStrategy cloud deployment can include ETL capabilities and/or a data warehouse, but the software for these comes from partners. Not all tools are fully web-enabled; for example, Architect relies on remote desktop capabilities, and some customers have expressed concern that access to security controls isn't the same as with an on-premises deployment.

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Supplemental Material

Online Resource

The online version of Figure 5 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:

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- › **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 survey.** To understand companies' motivations for adopting a cloud BI solution as well as the level of satisfaction with the chosen vendor, Forrester also surveyed 59 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>.

Survey Methodology

Forrester's Global Business Technographics Data And Analytics Survey, 2015 was conducted using an online survey fielded in January through March 2015 of 3,005 business and technology decision-makers located in Australia, Brazil, Canada, China, France, Germany, India, New Zealand, the UK, and the 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.

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We have illustrated only a portion of the survey results in this document. To inquire about receiving full data results for an additional fee, please contact data@forrester.com or your Forrester account manager.

Integrity Policy

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

Endnotes

- ¹ The data in Figure 2 is based on the results of the customer reference survey conducted for this evaluation. The same priorities can be seen in the results of other surveys, such as Forrester's Forrsights Software Survey, Q4 2013. See the "[The Forecast For Business Intelligence Is Partially Cloudy](#)" Forrester report.
- ² The data in Figure 3 is based on the results of the customer reference survey conducted for this evaluation. The same priorities can be seen in the results of other surveys, such as Forrester's Forrsights Software Survey, Q4 2013. See the "[The Forecast For Business Intelligence Is Partially Cloudy](#)" Forrester report.
- ³ Whatever your own definition of "cloud," and whether you're a cloud enthusiast or a cloud skeptic, the key to successfully leveraging cloud delivery models for BI and analytics is in understanding the main differences between the available options and the key questions to ask that will flush out the details not every vendor is keen to highlight. See the "[Brief: BI And Analytics In The Cloud — What The CIO Needs To Know](#)" Forrester report.
- ⁴ The need to comply with regulations such as HIPAA or to keep data in a region or country is often given as a reason for completely ruling out cloud software for BI and analytics applications. If you're in that camp, think again: Whether or not you can achieve the required level of compliance has nothing to do with whether the BI solution is multitenant cloud or not. What matters is whether the vendor is in a position to offer the software in a compliant manner (e.g., the ability to isolate data or guarantee that data resides in a particular region or country). See the "[Brief: BI And Analytics In The Cloud — What The CIO Needs To Know](#)" Forrester report.

In a noteworthy development, Microsoft and Germany's T-Systems have announced a novel solution for European customers who want the features offered by US-based public cloud providers while being concerned about entrusting their customer data to those same US-based public cloud providers. Enterprises interested in using Power BI should note that this is currently not included in the portfolio of Microsoft solutions offered as part of this deal. See the "[Quick Take: Trust Us, We Are European](#)" Forrester report.
- ⁵ Business professionals increasingly take the ability to access critical applications and data on their mobile device for granted, and BI content is no exception. Early adopters of mobile BI have also made it clear that having "anytime, anywhere" access to critical business information can have truly transformative potential, whether it's around process efficiency, improved decision-making, or the development of innovative products and services. At the same time, it's not obvious how to choose the most suitable mobile BI solution from the plethora of available offerings. See the "[How To Select A Mobile BI Solution](#)" Forrester report.
- ⁶ There's a new 800-pound gorilla in the BI and analytics room. QuickSight, a new offering from Amazon Web Services (AWS), will disrupt the analysis and data visualization areas of the BI market with a new, highly scalable cloud software-as-a-service platform. See the "[Quick Take: AWS QuickSight Will Disrupt Business Intelligence And Analytics](#)" Forrester report.

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- ⁷ The eight key cloud BI trends are: offering the entire function set in the cloud with a rapid delivery cycle of new features, enabling out-of-the-box access to a wide variety of cloud data sources (data stores and applications), providing mobile capabilities beyond browser-based access, supporting at least partial offline delivery, empowering business users to be less dependent on tech support, and leveraging insights gained from cloud delivery to improve the product and develop new services.
- ⁸ In April 2015, Birst and Tableau announced a technology partnership; via a jointly developed ODBC connector, the two platforms can connect directly to each other. Source: “Birst Launches New Technology Partnership with Tableau Software,” Birst press release, April 15, 2015 (<https://www.birst.com/company/press/birst-launches-new-technology-partnership-with-tableau-software/>) and Brad Peters and Dan Jewett, “Birst and Tableau: A Partnership to End Analytical Silos,” Tableau webinar (<http://www.tableau.com/learn/webinars/birst-and-tableau-partnership-end-analytical-silos>).
- ⁹ SAS has built on its traditional strengths of an advanced predictive analytics platform plus vertical-industry- and business-domain-specific advanced analytics applications with a formidable Agile BI product — Visual Analytics. See the “[The Forrester Wave™: Agile Business Intelligence Platforms, Q3 2015](#)” Forrester report.
- ¹⁰ For more information on Microsoft, see the “[The Forrester Wave™: Enterprise Business Intelligence Platforms, Q1 2015](#)” Forrester report and see the “[The Forrester Wave™: Enterprise Business Intelligence Platforms, Q4 2013](#)” Forrester report.
- ¹¹ Microsoft is making it easier for organizations to say “why not use Excel for enterprise BI.” Forrester’s clients often choose Microsoft for BI solutions because it offers one-stop shopping from desktop productivity tools to enterprise application servers and databases, including cloud-based deployments. See the “[The Forrester Wave™: Agile Business Intelligence Platforms, Q3 2015](#)” Forrester report.
- ¹² Forrester often sees clients work with IBM because of its significant investment in research and innovation (including the cognitive computing Watson ecosystem), one-stop shopping for data management and BI products, and the unique management consulting and systems integration capabilities of IBM Business Analytics and Optimization professional services organization. See the “[The Forrester Wave™: Enterprise Business Intelligence Platforms, Q1 2015](#)” Forrester report.
- ¹³ At the time, the company was called Adaptive Planning. It was renamed Adaptive Insights in February 2014. In 2012, the company acquired myDIALS, a provider of cloud-based data visualization solutions.
- ¹⁴ TIBCO Jaspersoft is available on the AWS marketplace and can be purchased by the hour or on an annual subscription basis.

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