The rise of the Enterprise Intelligence Platform

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451 Research believes that we are witnessing the emergence of a new product category in the analytics sector with the Enterprise Intelligence Platform, combining data integration, data storage and processing, and analytics functionality in a single offering designed to meet the needs of both data operators and data consumers.

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Introduction

The launch of the first-generation Apple iPhone in 2011 provided a prime example of the celebrated stagecraft of Steve Jobs. In front of an expectant crowd, Jobs teased that Apple was about to launch three new products: a widescreen iPod, a revolutionary new mobile phone and an internet communicator.

It seems absurd today to think that anyone ever believed there was a market for internet communication devices distinct from the mobile phone. However, Jobs expertly used the audience's preconceived notions about existing product categories at the time to build the tension and expectation before it was revealed that Apple was introducing not three devices, but a single device that would address what had previously been considered three distinct market categories.

We are reminded of this as we consider the emergence of what we have termed the Enterprise Intelligence Platform: a new product category in the analytics space that combines functionality from what have previously been considered three distinct product categories: data integration, data storage and processing, and analytics.

451 TAKE

We don't believe that the Enterprise Intelligence Platform will have as much of an impact on the data and analytics market as the iPhone had on the mobile communication space, but we do see comparisons in terms of the potential for a new product to disrupt what have previously been seen as three distinct markets. We also don't believe that the days are numbered for stand-alone products addressing data integration, data storage and processing, and analytics. However, recent developments have illustrated that there is significant vendor and end-user interest in the development of products and services that provide a superset of this functionality that is aimed not just at data consumers but also data operators.

Defining the Enterprise Intelligence Platform

All analytics projects share the same overall goal: to turn raw data into business insight. To achieve this goal, enterprises need to adopt a three-step process that has traditionally involved three distinct products (historically from three separate vendors):

- Ingest and integrate data from enterprises applications, typically using ETL tools.

- Store and process the data, typically in a data warehouse, where the data is modeled and schema applied.

- Analyze the data, using business intelligence, visualization or data science tools.

Thanks to merger and acquisition and research and development activity, enterprises no longer need to go to three separate vendors to address these three steps. All the biggest vendors in the market (such as Oracle, IBM, SAP, Microsoft, AWS, Google) now have product portfolios that address all three.

Additionally, a key trend in the analytics sector in recent years has been analytics specialists adding data ingestion and integration functionality to their analytics tools to create what we consider analytics platforms.

While these analytics platform providers have largely shied away from addressing database functionality (other than for acceleration purposes), there are also a variety of companies that, although best known for their analytics functionality, take advantage of data ingestion/integration and data storage and processing technology behind the scenes. Examples include GoodData, Infor's Birst and Domo.

We have previously cited the latter as a prime example of an Enterprise Intelligence Platform. While best known for its Explorer analytics suite and Buzz collaboration and productivity functionality, the company's cloud service is based on a full-stack portfolio that includes the Connect integration framework, the Fusion ETL engine and the Adrenaline in-memory data-processing engine.

While much of this underlying data integration and processing functionality is masked from data consumers (business analysts and decision-makers) it is available to data operators (data management and IT staff).

This highlights one of the definitional factors of the Enterprise Intelligence Platform that separates it from multiple products or services offering the same functionality: that it is a single product or service that provides a superset of analytics/data science/data management functionality that is aimed not just at data consumers (e.g., data analysts, business analysts, data scientists) but also data operators (data management professionals and IT).

Major vendors are entering the picture

In addition to those noted above, several other vendors are also in the process of developing products that could be considered Enterprise Intelligence Platforms. Incorta is arguably already there with its combination of data ingestion, data mapping and analytics functionality, and we recently noted that we believe it is therefore in a prime position to help define a new market category for the Enterprise Intelligence Platform.

Meanwhile, SAP combined its HANA compute functionality with data virtualization and query federation with the launch of SAP HANA Cloud Services. Significantly, given its market weight, Oracle recently outlined its intention to integrate data ingestion/integration and analytics functionality with its Autonomous Database to create an Autonomous Data Platform. We also think that Cloudera offers what could be considered an Enterprise Intelligence Platform given that its Cloudera Data Platform offering provides a breadth of functionality covering ingestion, storage/processing and analytics/machine learning.

Microsoft also recently took a step in the same direction with the launch of Azure Synapse Analytics, the evolution of its Azure SQL Data Warehouse offering with the addition of data integration functionality and acceleration for analytics and machine learning. Meanwhile, Looker announced Data Connections, a managed service through which it will provide customers with managed data integration and data processing services (based on FiveTran and Google BigQuery, respectively) in addition to its cloud-based data modeling and business intelligence functionality.

Which isn't to say that we necessarily believe that the days are numbered for stand-alone data ingestion/integration, database or analytics products. The Enterprise Intelligence Platform will not consolidate three separate current product categories in quite the same way that the iPhone and other similar devices did.

Instead, what we believe we are seeing is the emergence of a new product category alongside those distinct stand-alone products categories: one that delivers a combination of functionality for enterprise-scale deployments that is designed to be consumed as a single product/service.
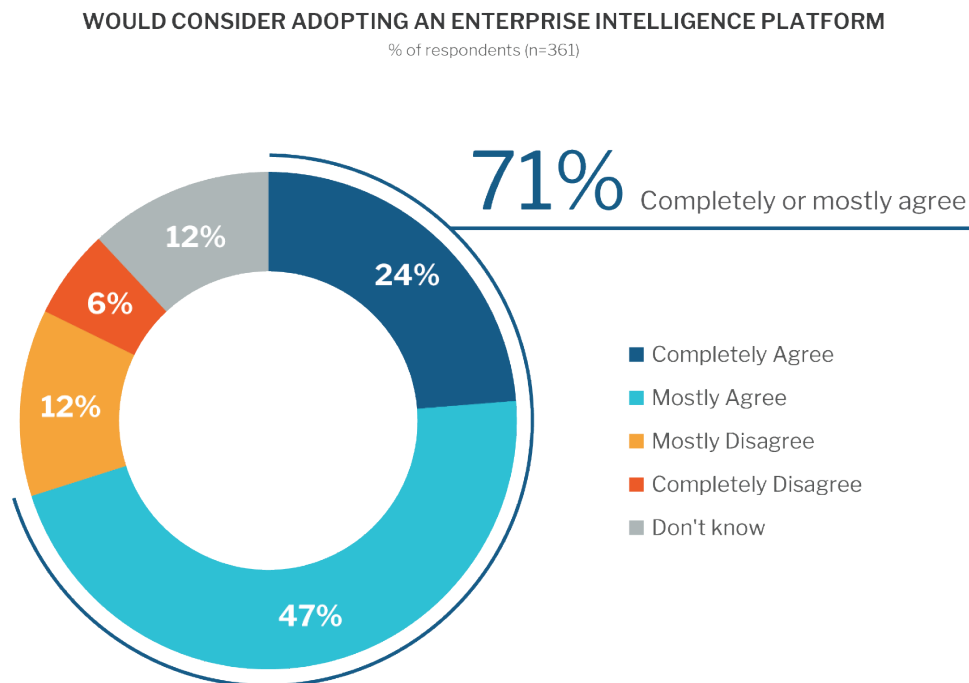
Enterprise demand

451 Research's Voice of the Enterprise Data and Analytics survey data also indicates that customer demand for such a single product or service is also building.

In our latest survey, respondents were asked to what extent they agreed with the statement 'my organization would consider adopting an Enterprise Intelligence Platform (defined as providing a superset of analytics/data science/data management functionality that is aimed not just at data consumers (e.g., data analysts, business analysts, data scientists) but also data operators (data management professionals and IT)).'

The results indicate that 71% of respondents agree that their organization would be interested (24% completely agree, 47% mostly agree). The proportion is higher among the most data-driven companies (78% agree, with 38% responding that they completely agree, and 40% that they mostly agree).

The Enterprise Intelligence Platform is one of six key trends we expect to have an impact on the Data, AI and Analytics sector in 2020 and beyond. For further details of the other five trends see this report.

Figure 1: Interest in adopting an Enterprise Intelligence Platform

WOULD CONSIDER ADOPTING AN ENTERPRISE INTELLIGENCE PLATFORM
% of respondents (n=361)

71% Completely or mostly agree

- Completely Agree
- Mostly Agree
- Mostly Disagree
- Completely Disagree
- Don't know

24% / 47% / 12% / 6% / 12%

Source: Voice of the Enterprise: Data & Analytics, 2H 2019