

State of Business Intelligence

Only 28% of potential BI users have any meaningful access

– *Business Intelligence Purchase Drivers and Adoption Rates, Gartner*

32% of Excel users are comfortable with using it for “Advanced Analysis” e.g., PivotTables

– *Excel Segmentation Research*

31% of all BI initiatives partially meet or don’t meet the business goals originally set

– *BI Survey 9, BARC*

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Knowledge workers spend too much time looking for, not enough time analyzing the information.

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Lines between producers and consumers of information have largely disappeared.

”

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Requirements change way too fast for IT and traditional technology to keep up.

”

BI enables key business priorities for CIOs

Top 5 Business Priorities

1 Business process improvement

2 Reducing enterprise costs

3 Increasing the use of information and analytics

4 Improving enterprise workforce effectiveness

5 Attracting and retaining new customers

Business
Intelligence

*Top 5 Technology Priority
4 years running*

Gartner.

Source: Gartner EXP (January 2010)

Recent Market Momentum

Leader in Gartner Data Warehouse Database Management Systems Magic Quadrant



[Gartner, Inc., Magic Quadrant for Data Warehouse Database Management Systems Magic Quadrant, Mark A. Beyer, Donald Feinberg, Merv Adrian, Roxane Edjlali, February 6, 2012. The Magic Quadrant is copyrighted 2012 by Gartner, Inc. and is reused with permission. The Magic Quadrant is a graphical representation of a marketplace at and for a specific time period. It depicts Gartner's analysis of how certain vendors measure against criteria for that marketplace, as defined by Gartner. Gartner does not endorse any vendor, product or service depicted in the Magic Quadrant, and does not advise technology users to select only those vendors placed in the "Leaders" quadrant. The Magic Quadrant is intended solely as a research tool, and is not meant to be a specific guide to action. Gartner disclaims all warranties, express or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

Recent Market Momentum

Leader in Gartner Business Intelligence Platform Magic Quadrant



[Gartner, Inc., Magic Quadrant for Business Intelligence Platforms, John Hagerty, Rita L. Sallam, James Richardson, February 06, 2012.

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2x Market Growth for Microsoft BI



Region	(All)				
Market	(All)				
SubSegment	BI Platforms				
Country					
		2010 YR			
Vendor	Sum of Revenue (M)	Growth %	Share %		
SAP	1,788.1	16.5%	26.7%		
IBM	927.5	5.8%	13.8%		
Microsoft	905.7	23.9%	13.5%		
SAS Institute	829.4	1.2%	12.4%		
Oracle	768.6	13.8%	11.5%		
TIBCO	56.8	1.0%	1.1%	70.5	24.1%
Tableau	17.8	0.3%	0.6%	38.0	113.5%
Jaspersoft	20.1	0.3%	0.5%	30.5	51.4%
Panorama Software	24.0	0.4%	0.4%	27.8	15.8%
Dimensional Insight	18.9	0.3%	0.3%	20.7	9.5%
arcplan	20.9	0.4%	0.3%	20.5	-1.9%
iDashboards	11.0	0.2%	0.3%	19.0	72.7%
Bitam	14.1	0.2%	0.2%	16.5	16.9%
Target	15.3	0.3%	0.2%	16.1	5.7%
Lawson Software	16.7	0.3%	0.2%	16.0	-4.6%
Technology One	9.9	0.2%	0.2%	15.5	56.2%
LoqiXML	10.8	0.2%	0.2%	14.6	35.2%
Board	13.5	0.2%	0.2%	14.2	5.1%
Conda	10.6	0.2%	0.2%	12.2	15.1%
Pentaho	10.1	0.2%	0.2%	12.1	20.2%
Roguewave	4.3	0.1%	0.2%	11.8	172.2%
Salient	10.4	0.2%	0.2%	11.4	9.6%
Infor Global Solutions	9.8	0.2%	0.1%	9.1	-7.1%
Tonbeller	8.2	0.1%	0.1%	7.8	-4.9%
Rocket Software	3.9	0.1%	0.1%	4.4	11.2%
Visual Numerics	5.7	0.1%	0.0%		-100.0%
SPSS	24.8	0.4%	0.0%		-100.0%
Grand Total	5,954.5	100.0%		6,705.1	12.6%

Fastest growing BI mega-vendor at **24%** YoY growth

Growing at **2x** the BI Platform market average

Source: Gartner, Market Share: All Software Markets, Worldwide, 2010, March 30, 2011

Building on a foundation of leadership

Most popular OLAP server

- BI Verdict 2010

Fastest growing reporting platform

- BI Verdict 2010

Excel used by over 90% of information workers – Microsoft Analysis

SharePoint used by over 75% of enterprise companies.

- Forrester Research

Fastest growing mega-vendor growing over 2x market in 2009

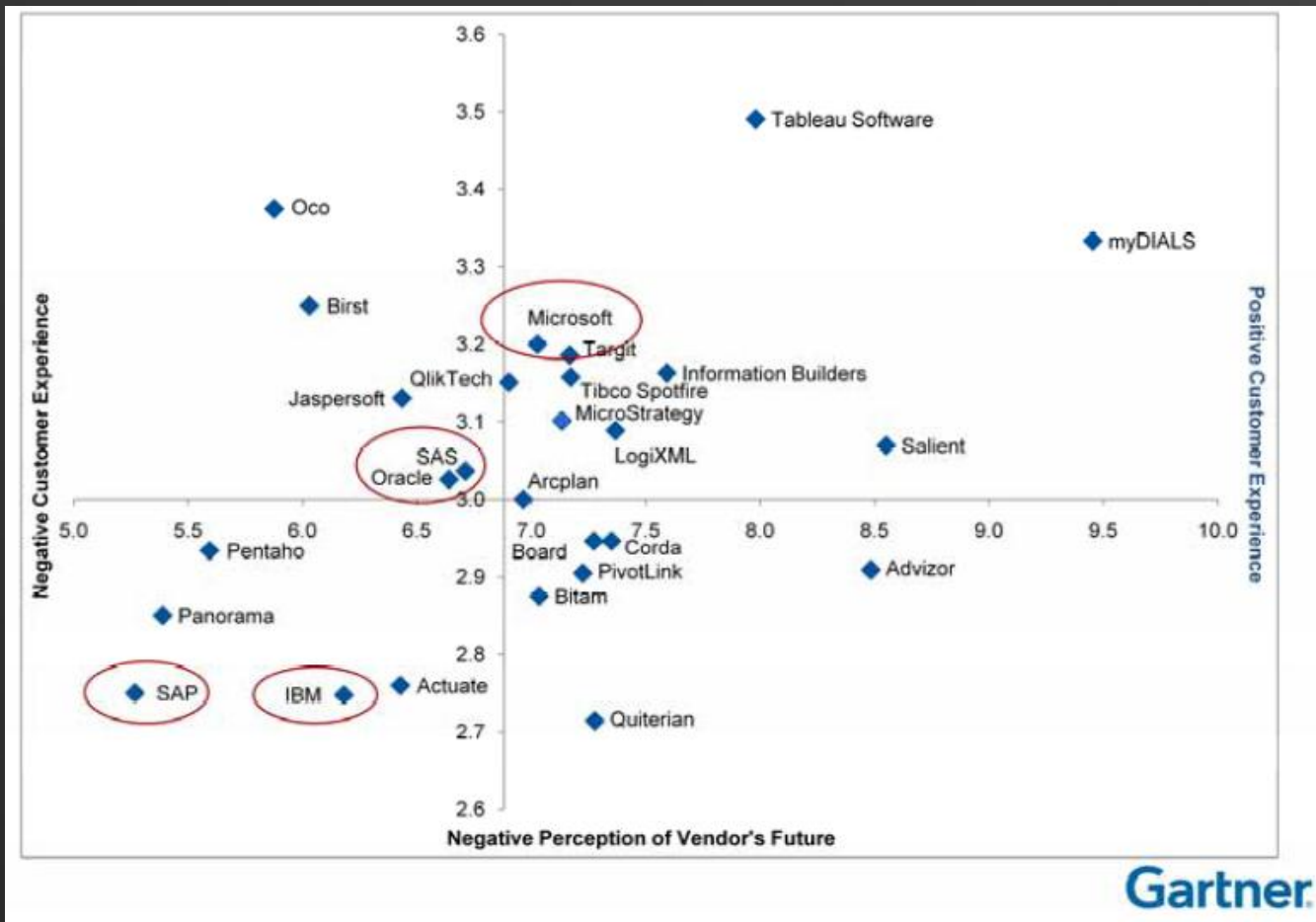
- IDC WW BI Tools 2009 Vendor Shares

Hundreds of thousands of downloads of PowerPivot

- Since April 2010

PowerPivot: Winner of eWeek Labs “Top 10 Products of the Year”

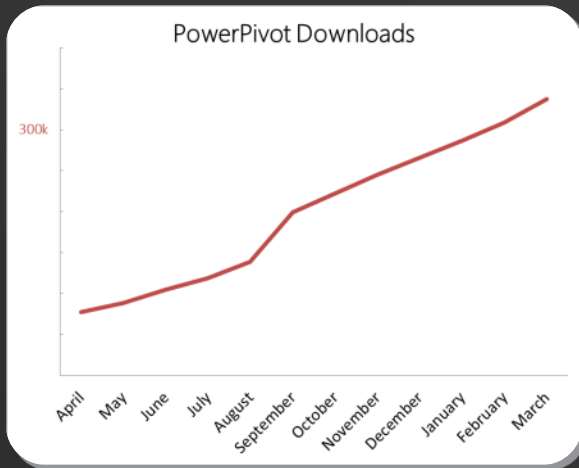
#1 mega-vendor for customer experience



Gartner

Recent Market Momentum

Over 300k downloads of PowerPivot since launch



Strong partner confidence in our platform strategy



Outstanding reviews and customer feedback

CRN NEWS, ANALYSIS, AND PERSPECTIVE FOR VAR'S AND TECHNOLOGY INTEGRATORS

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2011 Channel Champions: Overall Winners

10:00 AM EST Mon. Apr. 25, 2011

< PREVIOUS | 1 ... | 9 | 10 | 11 | 12 | 13 | ... 27 | NEXT >

Business Intelligence

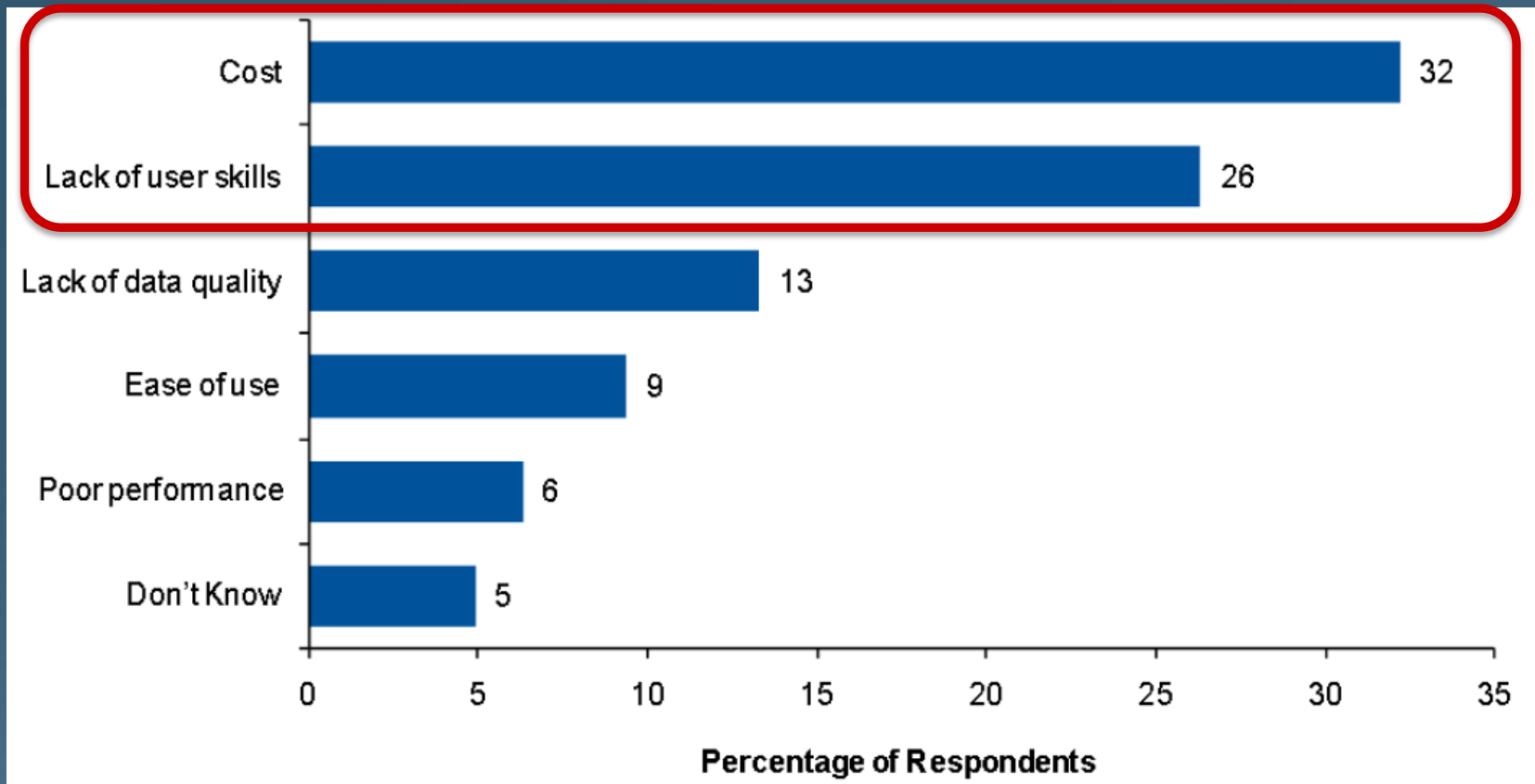
Microsoft
Score: 77.4

Despite attempts by rivals IBM, Oracle and SAP to buy their way into stronger business intelligence portfolios via acquisitions, Microsoft won the category with a clean sweep of all criteria. Partners must agree with Microsoft's philosophy that the best way to bring BI capabilities to a wide audience is through the software knowledge workers already use every day.

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Microsoft®

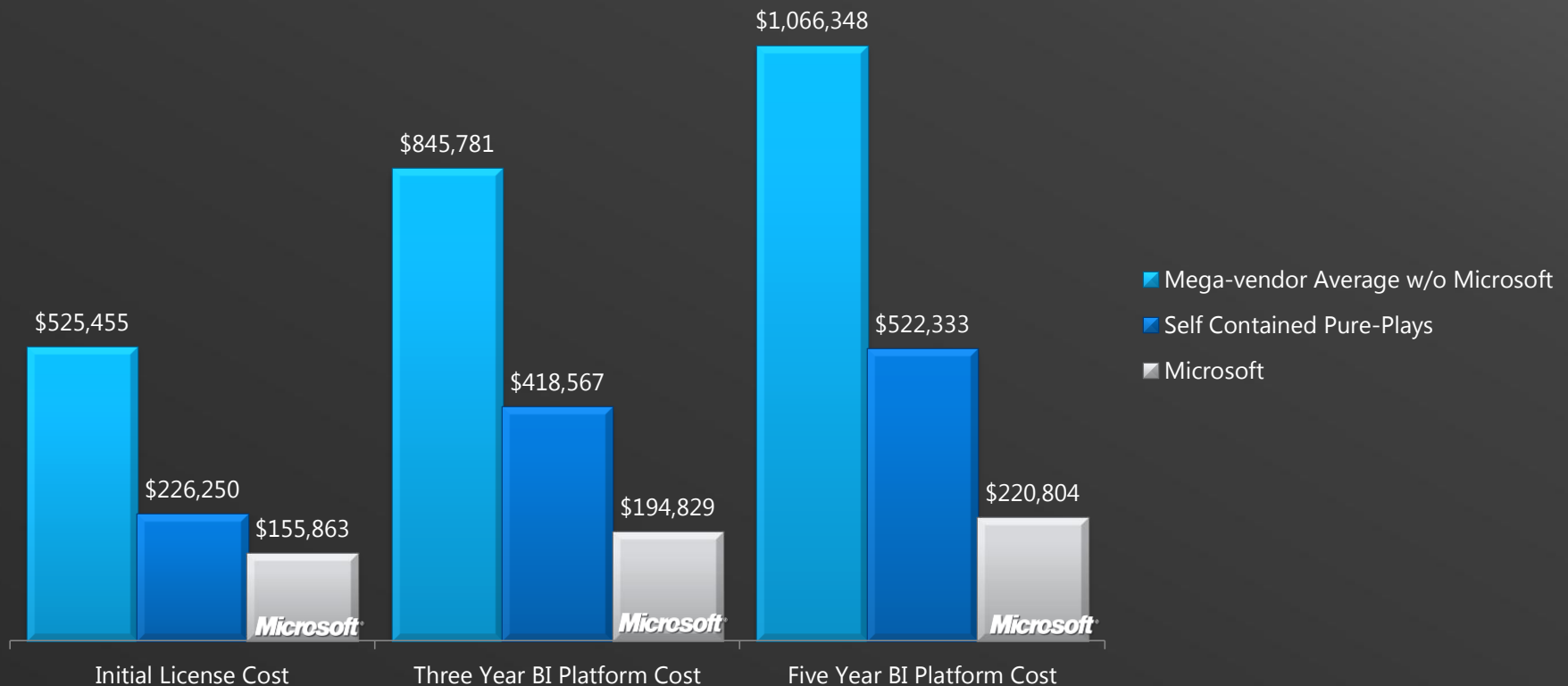
Limitations to Wider BI Platform Deployment



Source: Gartner, BI Platforms Magic Quadrant Customer Survey conducted November 2009

Cost and Lack of User skills top two limitations why an organization doesn't deploy BI wider

Microsoft BI - Priced for broad deployment



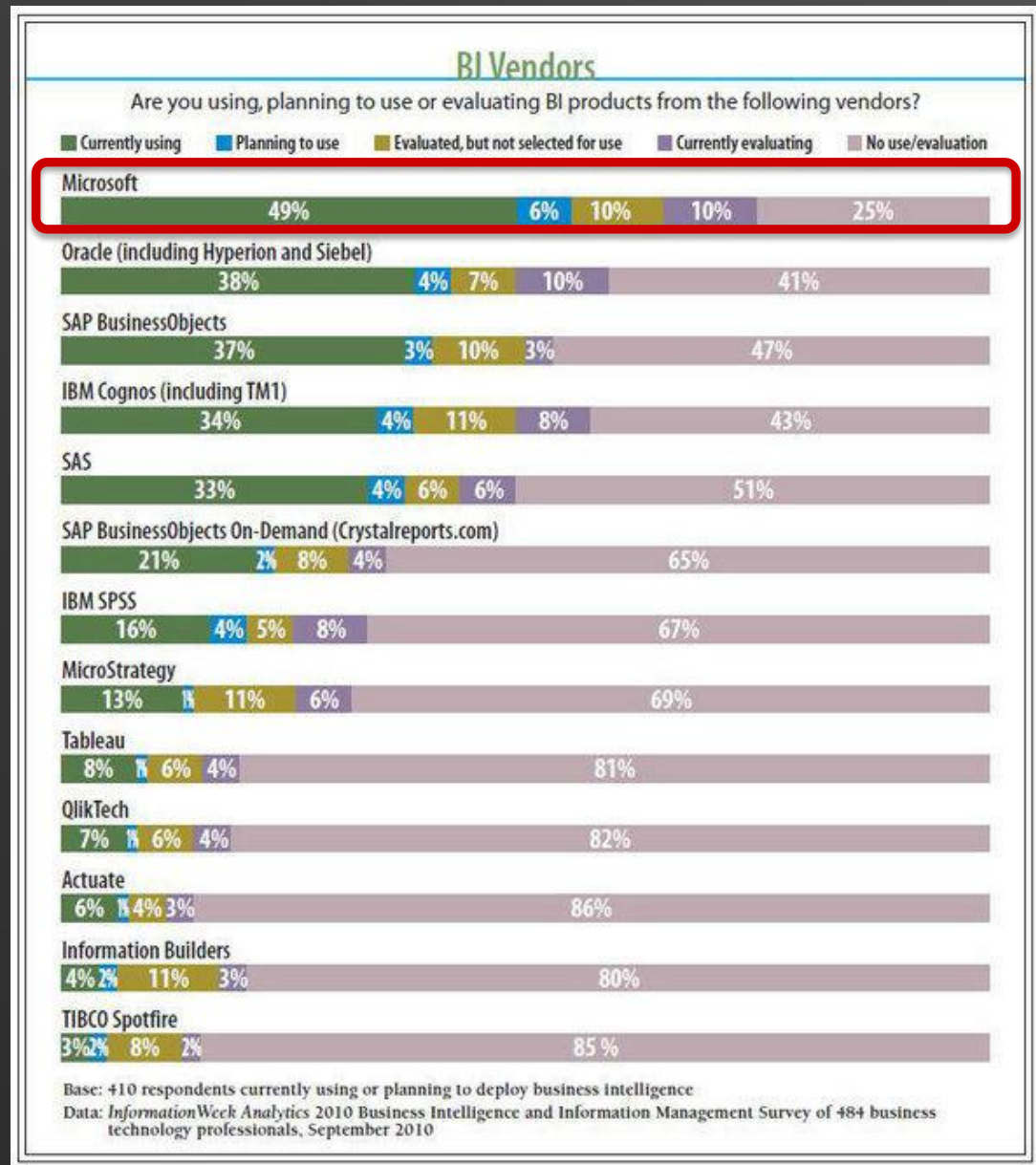
Source: Gartner, *BI Platform Licensing Models and Negotiating Strategies* - April, 2010

“Not only is purchase price becoming an increasingly important factor in initial BI platform purchases, but the high cost of BI platforms is often perceived to be a significant inhibitor to broader deployment.”

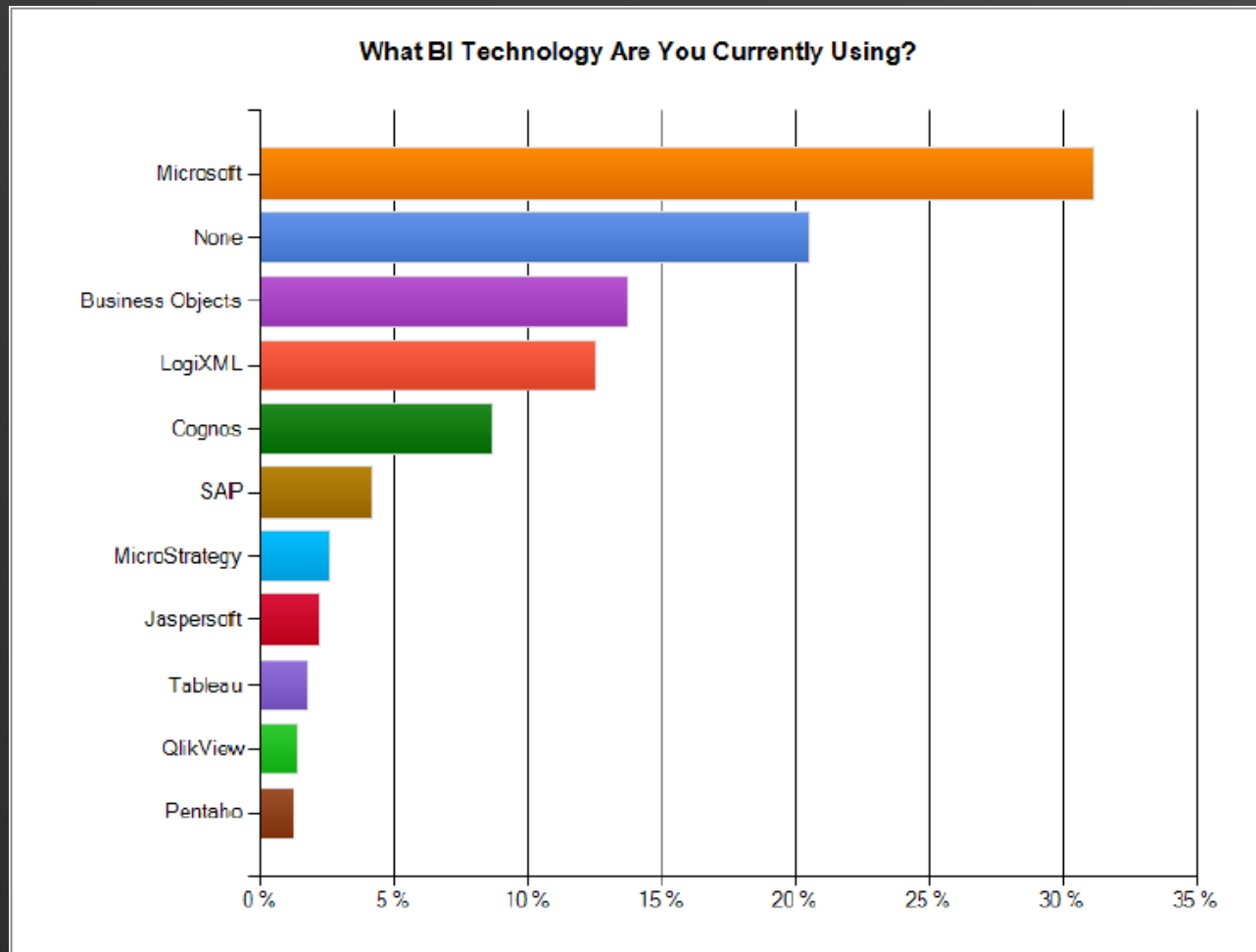
– Rita Sallam, Gartner – BI Platform Licensing Models and Negotiating Strategies (April, 2010)

Microsoft BI - Highest Adoption

- Microsoft BI Products are the **most widely used**
- Microsoft BI has the **highest planned usage**
- Microsoft BI is the **most evaluated** BI Product



Microsoft – The most used BI Technology



*LogiXML Survey conducted March 29-April 8, 2011
Base of 575 professionals across several industries

Built to be Mission Critical *Yahoo!*



Events per Day	3,500,000,000
Data Load per Day	1.2TB
Files per Hour	60 x 50GB
Analysis Services Cube	12TB

“

...It has to be information at the speed of thought...we were able to achieve less than 10 seconds of query time against a 12TB Cube

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