Marknaden för Analys och Business Intelligence-plattformar (ABI-plattformar), del 2

Erik Perjons

DSV, Stockholm University

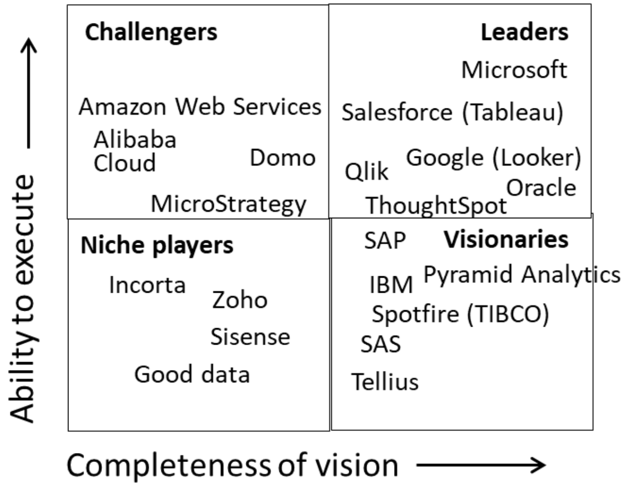
Magic Quadrant

Magic Quadrant

Gartner's Sources:

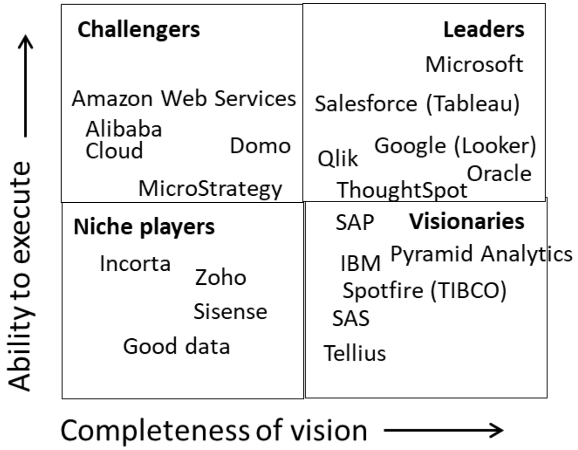
- Gartner analysts' evaluations
- Customer feedback and perceptions
- Gartner peer insights (users and professionals) data
- Vendor business questionnaires responses
- Vendor strategy and roadmap briefings
- Vendor responses on 12 critical capabilities
- Product demonstration videos
- External data on market momentum

- Ability to execute
- Completeness of vision



[Schlegel et al., 2024]

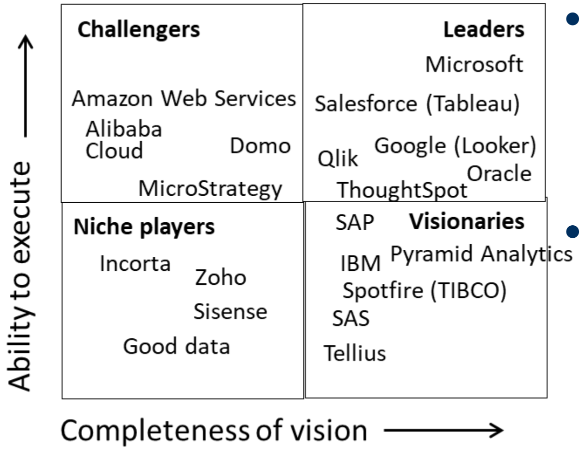
Magic Quadrant



- **Ability to execute** – vendors ability deliver on its vision through product performance, market responsiveness, financial strength, and operational efficiency.
- The criteria used for measuring ABI vendors:
  - **Product or Service** – Quality, functionality, and competitiveness of offerings.
  - **Overall Viability** – Financial stability and long-term sustainability.
  - **Sales Execution/Pricing** – Effectiveness in acquiring customers and pricing competitiveness.
  - **Market Responsiveness/Record** – Ability to adapt to market changes and demands.
  - **Marketing Execution** – Success in promoting and positioning products effectively.
  - **Customer Experience** – Satisfaction, support, and overall user engagement.
  - **Operations** – Efficiency in business processes and day-to-day execution.

[Schlegel et al., 2024]

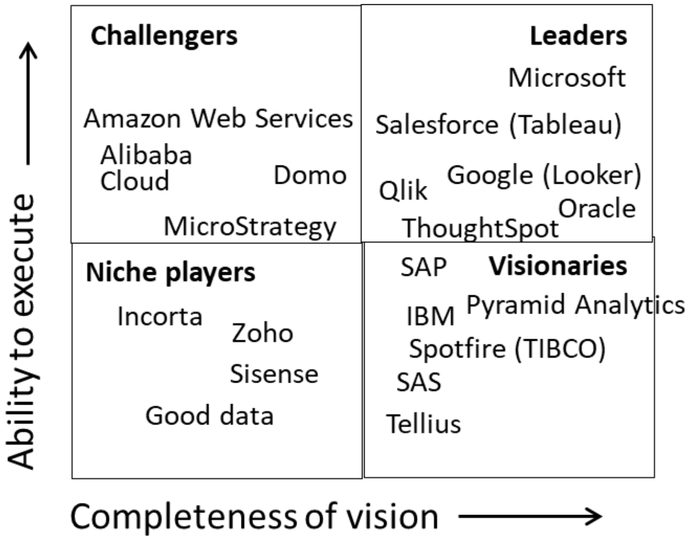
Magic Quadrant



- **Completeness of vision** – ABI vendors ability to articulate a clear, forward-thinking, and innovative strategy that aligns with market trends and future demands.
- The criteria used for measuring ABI vendors:
  - **Market Understanding** – Ability to anticipate customer needs and trends.
  - **Marketing Strategy** – Clear messaging, positioning, and communication to target markets.
  - **Sales Strategy** – Effective go-to-market plan and sales channels.
  - **Offering (Product) Strategy** – Innovation and alignment of product with market demands.
  - **Business Model** – Viability and adaptability of the company's revenue approach.
  - **Vertical/Industry Strategy** – Tailored solutions for specific industries and sectors.
  - **Innovation** – Commitment to developing new and disruptive technologies.
  - **Geographic Strategy** – Expansion and support across different global markets

[Schlegel et al., 2024]

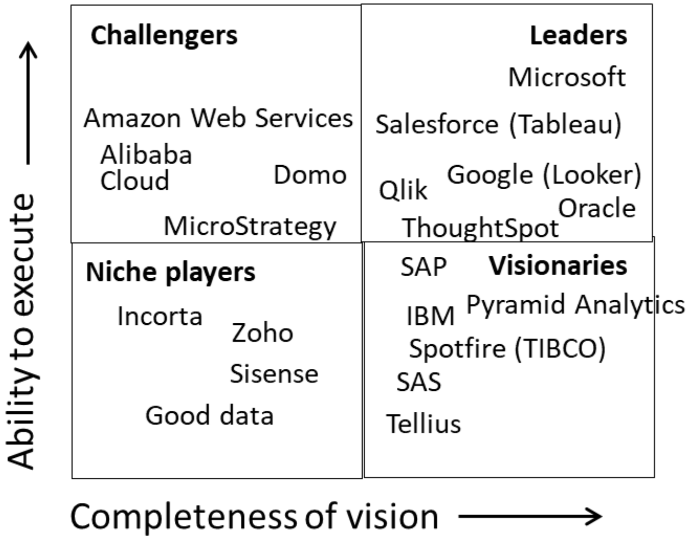
Magic Quadrant



- **Challengers** – are well-positioned in the market, often with strong financial backing and a broad customer base. They provide reliable solutions with robust support and implementation capabilities. However, they might lack a forward-thinking approach and focus more on refining existing solutions rather than developing new ones.

[Schlegel et al., 2024]

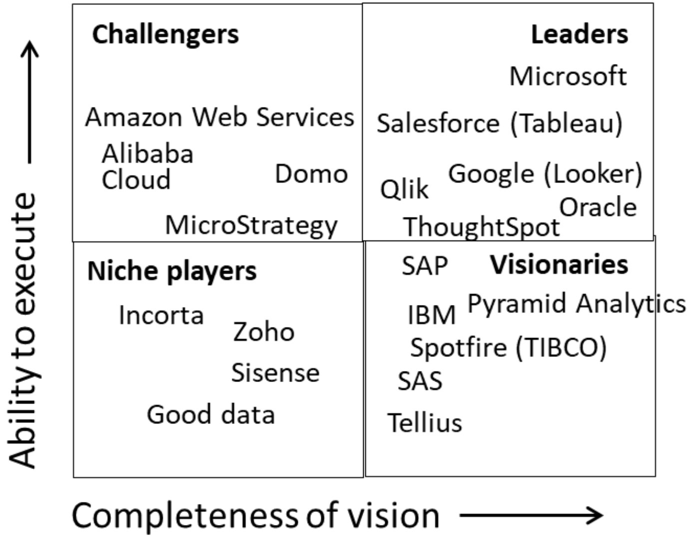
Magic Quadrant



- **Visionaries** – have a strong and differentiated vision for delivering a modern ABI platform. They excel in specific areas, such as advanced analytics, AI integration, or unique visualization capabilities, but may struggle with large-scale execution, customer support, and market reach compared to Leaders and Challengers.

[Schlegel et al., 2024]

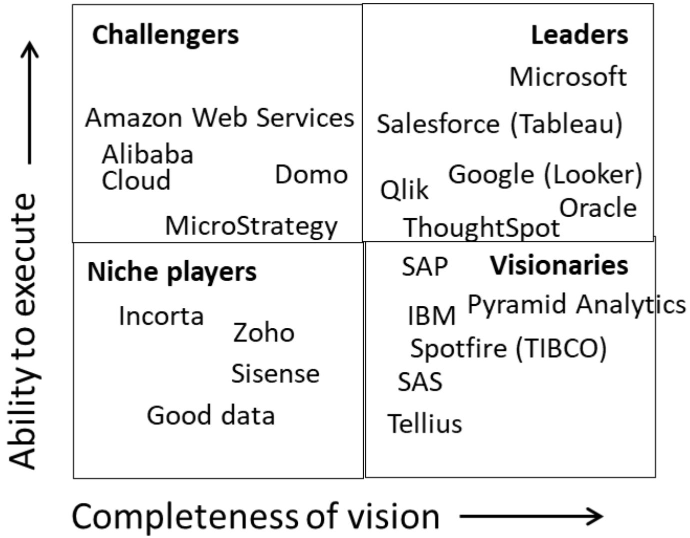
Magic Quadrant



- **Leaders** – have a solid understanding of the market's needs and deliver comprehensive solutions with strong execution capabilities, customer satisfaction, and a clear vision for the future.

[Schlegel et al., 2024]

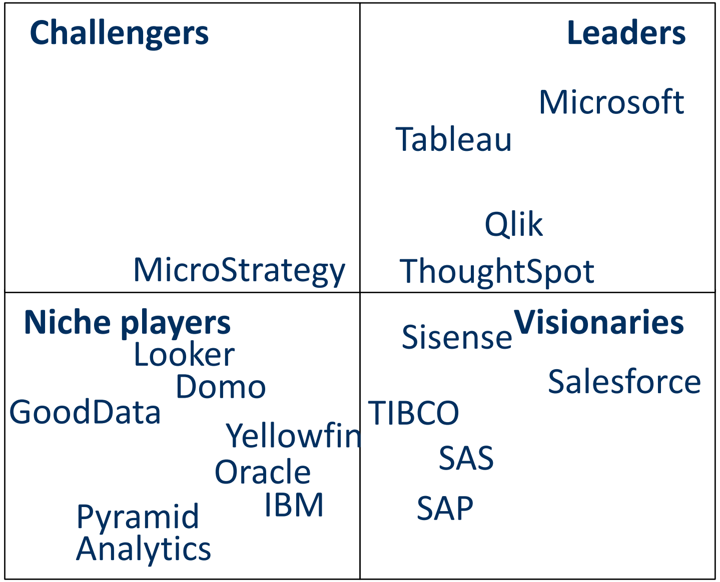
Magic Quadrant



- **Nisch players** – focus on a specific domain, industry, or use case but may lack the broader capabilities or market reach of the larger vendors.

[Schlegel et al., 2024]

Magic Quadrant 2019



2019

[Howson et al., 2019]

The market 2019 according to Gartner

- **Microsoft's major BI product is Power BI.** Power BI is an easy-to-use product with high levels of customer satisfaction. Power BI is low priced and have a strong global adoption.
- **Tableau's major BI product is named Tableau.** The product is popular due to its easy-to-use visual exploration and data manipulation. Tableau has a large active user community that acts like fans.
- **Qlik's major product is QlikSense**, built on Qlik Analytics Platform. However, Qlik's original product, **QlikView,** still have a large customer base. Qlik have a large and active user community.

[Howson et al., 2019]

Magic Quadrant 2019 and 2022

Stockholms universitet

Challengers	**Leaders**
MicroStrategy	Microsoft Tableau Qlik ThoughtSpot
Niche players Looker Domo GoodData Yellowfin Oracle IBM Pyramid Analytics	Sisense **Visionaries** Salesforce TIBCO SAS SAP

2019

Challengers	**Leaders**
Google (Looker) Domo	Microsoft Salesforce (Tableau) Qlik
Niche players MicroStrategy Alibaba Cloud Amazon Web Services Pyramid Analytics Zoho Incorta	**Visionaries** ThoughtSpot TIBCO Sisense SAP Oracle IBM SAS Yellowfin Tellius

2022

[Howson et al., 2019]

[Kronz et al., 2022]

The market 2022 according to Gartner

- **Microsoft** is still the market leader with its Power BI tool, which has now been aligned with MS Office 365 and Teams
- **The CRM giant Saleforce has aquired Tableau** and have started to integrate their solutions. Salesforce has also aquired Narrative Science, a data storytelling vendor. The result: Salesforce (Tableau) has now become a market leader as well.
- **Qlik** is still a leader

[Kronz et al., 2022]

The market 2022 according to Gartner

- **Google's entrance.** Google acquired Looker and has made an ”impressive entrance” into the ABI market, according to the Gartner report. The Looker ABI platform has been integrated into the Google Cloud Platform ecosystem
- **Domo**. Domo has gone from a nisch player to a challenger by, for example, made use of the low-code/no-code solution
- **Oracle and SAP** have momentum.

[Kronz et al., 2022]

Magic Quadrant 2022 and 2023

Stockholms universitet

2022

Challengers	**Leaders**
Google (Looker) Domo	Microsoft Salesforce (Tableau) Qlik
Niche players	**Visionaries**
MicroStrategy Alibaba Cloud Amazon Web Services Pyramid Analytics Zoho Incorta	ThoughtSpot TIBCO Sisense Oracle SAP IBM SAS Yellowfin Tellius

[Kronz et al., 2023]

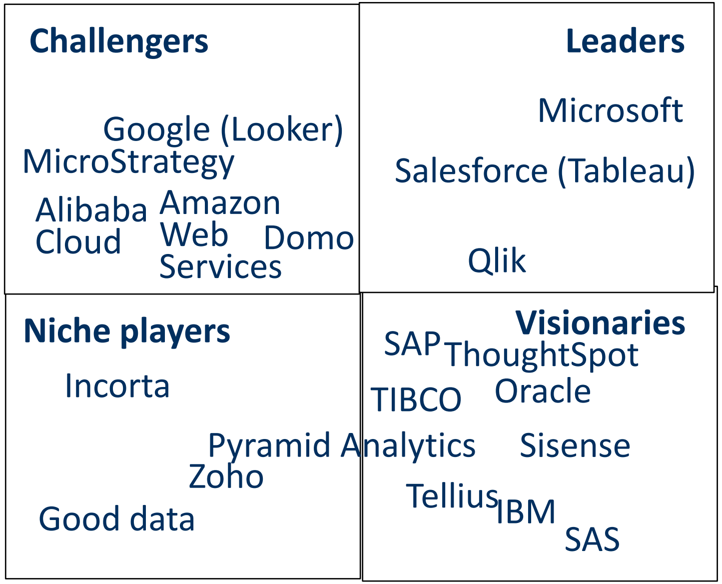
2023

Challengers	**Leaders**
Google (Looker) MicroStrategy Alibaba Cloud Amazon Web Services Domo	Microsoft Salesforce (Tableau) Qlik
Niche players	**Visionaries**
Incorta Pyramid Analytics Zoho Good data	SAP ThoughtSpot TIBCO Oracle Sisense Tellius IBM SAS

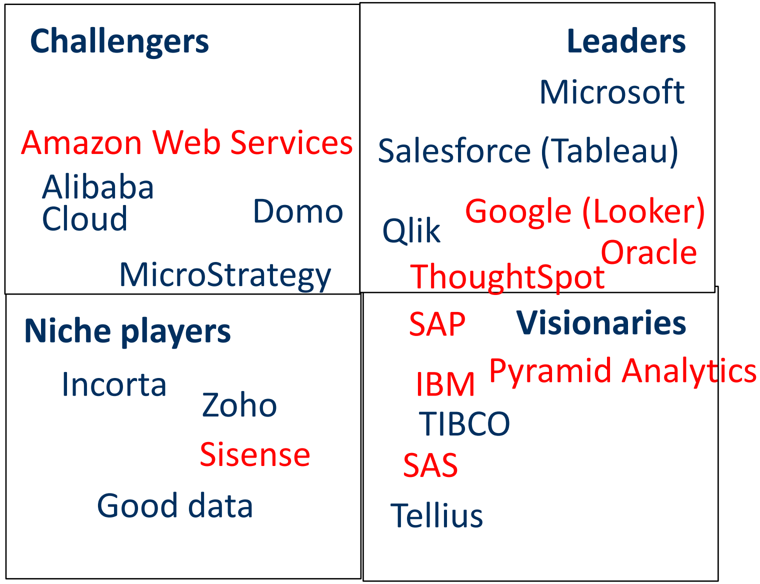
[Schlegel et al., 2024]

Magic Quadrant 2023 and 2024

Stockholms universitet



2023



2024

[Schlegel et al., 2023]

[Schlegel et al., 2024]

The market 2024 according to Gartner

Stockholms universitet

- **Microsofts product Power BI continues to dominate the market**, and sales is still growing strongly. A major reason for that is the bundling of Power BI with Microsofts 365, which is provided with a reduced price. Microsoft has also integrate Power BI with Microsoft Teams.

[Schlegel et al., 2024]

Market developments 2024

Stockholms universitet

- **Major cloud ERP and CRM providers also provide ABI solutions.** There is a risk of lock-in using these cloud solutions. However, several cloud service providers have open up their software stacks so that customer organizations can run applications across multiple cloud offerings (multicloud):
  - Microsoft – Offers Power BI as part of its ecosystem, alongside ERP (Dynamics 365) and CRM solutions.
  - Salesforce – Provides Tableau for analytics along with its CRM solutions.
  - Oracle – Offers Oracle Analytics Cloud, integrated with Oracle ERP and CRM systems.
  - SAP – Provides SAP Analytics Cloud, which integrates with SAP's ERP and CRM products.
  - Google (Looker) – Integrates with Google Cloud Services, including data warehousing and business applications.
  - Amazon Web Services (AWS QuickSight) – Offers cloud-based BI solutions that integrate with AWS services.

[Schlegel et al., 2024]

Magic Quadrant 2024 and 2025

Stockholms universitet

2024

Challengers	Leaders
Amazon Web Services Alibaba Cloud Domo MicroStrategy	Microsoft Salesforce (Tableau) Qlik Google (Looker) Oracle ThoughtSpot
Niche players	**Visionaries**
Incorta Zoho Sisense Good data	SAP IBM TIBCO SAS Tellius

2024

2025

Challengers	Leaders
Amazon Web Services Domo Alibaba Cloud	Microsoft Salesforce (Tableau) Google (Looker) Qlik ThoughtSpot Oracle
Niche players	**Visionaries**
Sigma Zoho Sisense Good data Incorta	Strategy (Micro Strategy) SAP Pyramid Analytics IBM Tellius SAS

2025

[Schlegel et al., 2024]

[Ganeshan et al., 2025]

The market 2025 according to Gartner

Stockholms universitet

- The ABI market continues to be dominated by established vendors, while **Generative AI, conversational analytics and semantic modeling** become increasingly important competitive factors.
- Competition is increasingly about how well vendors combine traditional BI with **AI, trusted data, semantic models and integration with larger cloud and application ecosystems**.

[Ganeshan et al., 2025]

Stockholms universitet

Magic Quadrant 2025 and 2026

2025

Challengers
- Amazon Web Services
- Domo
- Alibaba Cloud

Leaders
- Microsoft
- Salesforce (Tableau)
- Google (Looker)
- Qlik
- ThoughtSpot
- Oracle

Niche players
- Sigma
- Zoho
- Sisense
- Good data
- Incorta

Visionaries
- Strategy
- SAP
- Pyramid Analytics
- IBM
- Tellius
- SAS

2025

2026

Challengers
- Alibaba Cloud
- Domo

Leaders
- Microsoft
- Amazon Web Services
- Salesforce (Tableau)
- Google
- Qlik
- ThoughtSpot

Niche players
- Zoho
- Sigma
- Incorta

Visionaries
- SAP
- Strategy
- Oracle
- DataBricks
- SAS
- Good data
- IBM
- Tellius
- Service now (Pyramid Analytics)

2026

[Ganeshan et al., 2025]

[Ganeshan et al., 2026]

The market 2026 according to Gartner

Stockholms universitet

- The ABI market is increasingly characterized by competition around **Agentic AI, governed semantics and ecosystems**.
- Established vendors such as **Microsoft, Google, Qlik and Salesforce (Tableau)** remain Leaders, while **AWS and ThoughtSpot** also have strong positions.
- **Databricks appears for the first time as a Visionary**, showing how data and lakehouse platforms are entering the BI market.
- Overall, competition is moving from dashboards and visualization toward **AI agents, semantic layers, governance and connecting insights directly to actions**.

[Ganeshan et al., 2026]

Market 2026 in more detail

Leaders

Stockholms universitet

Vendor	Main Product	Strengths	Weaknesses
Microsoft	Power BI	Dominant market presence; deep integration with Teams, Excel and Microsoft Fabric	Dependence on Fabric (full value increasingly tied to Fabric capacity); capacity management risk (AI/Copilot uses shared capacity); workspace proliferation (many workspaces can duplicate reports and semantic models)
Salesforce (Tableau)	Tableau	Large community; strong visual analytics; flexible deployment (Tableau Cloud, Server/on-premises or hybrid)	Cost/licensing complexity (capabilities spread across pricing tiers); perceived Salesforce stack dependency (advanced agentic features use Agentforce/Data 360); operational reporting limits (weaker pixel-perfect and large-scale scheduled reporting)
Qlik	Qlik Cloud Analytics	Strong agentic AI vision; associative engine (free exploration without predefined query paths); flexible deployment (on-premises, cloud or hybrid)	No proprietary cloud ecosystem; caching/direct-query trade-offs (in-memory caching can duplicate data and complicate direct lakehouse queries); external LLM governance (BYOLLM routing must be managed outside Qlik)
Google	Looker	Governed semantic layer (LookML provides common metric definitions); strong analytics governance (permissions, certification and auditing); Gemini reasoning capabilities (advanced natural-language analysis)	Developer-centric perception (often seen as developer/engineer oriented); Google-centric value proposition (strongest benefits in Google Cloud); reporting limitations (less support for pixel-perfect and complex batch reporting)
Amazon Web Services (AWS)	Amazon Quick	AWS ecosystem and scale; predictable pricing; agentic workflow orchestration (natural-language-triggered, multistep workflows that can initiate actions)	Richer for AWS-centric environments (strongest integration with AWS services); smaller practitioner community; fragmented administration (monitoring, auditing and cost visibility span several AWS services)
ThoughtSpot	ThoughtSpot Analytics	Strong conversational analytics; semantic layer connectivity (can reuse governed definitions from external semantic layers); agent workflow orchestration (AI agents automate multiple steps across the analytics workflow)	Consumption cost predictability (query credits can make spend harder to forecast); weaker fit for some traditional reporting use cases (especially pixel-perfect/bursted reports)

[Ganeshan et al., 2026]

Visionaries

Vendor	Main Product	Strengths	Weaknesses
Databricks	Databricks AI/BI and Genie	Lakehouse-native BI (analytics runs directly on the Databricks data platform); serverless scaling (automatically scales compute for many users); Unity Catalog governance (central access control, lineage and security)	Enterprise focus (best fit for larger organizations); tightly coupled to Databricks (not a stand-alone BI layer); less mature operational reporting (stronger dashboards than pixel-perfect/paginated reports)
GoodData. AI	GoodData Cloud / Cloud Native	Headless semantic layer (reusable governed metrics independent of a specific dashboard); strong embedded deployment (multitenant/white-label analytics in other apps); agentic extensibility (MCP and external AI-agent integration)	Limited native agentic orchestration (complex autonomous multistep flows often need external/custom orchestration); lower market visibility; high technical adoption barrier (analytics-as-code requires engineering skills)
IBM	Cognos Analytics	Flexible deployment (cloud, on-premises and containers); enterprise reporting; prebuilt industry content (ready-made models/templates for sectors such as banking, healthcare and manufacturing)	Lower market visibility; limited native app ecosystem; SaaS options mainly IBM Cloud (fewer hyperscaler choices)
Oracle	Oracle Analytics Cloud	Oracle business application integration; role-specific AI assistants; multimodal data prep (combines structured data with unstructured sources such as PDFs and images)	Oracle ecosystem coupling (often strongest when used with Oracle applications/data); lower market visibility; limited BYOLLM capability (AI features mainly use Oracle-provided models/services)
SAP	SAP Analytics Cloud	Embedded in SAP BDC (part of SAP Business Data Cloud); planning/scenario analysis (forecasting, simulation and what-if analysis); prebuilt industry content (curated SAP data products and analytics)	Limited stand-alone mind share; platform complexity; weaker non-SAP semantic modeling
SAS	SAS Viya / Visual Analytics	AI assistance; open architecture/MCP (connects analytics with external tools and agent frameworks); credibility in regulated industries (strong statistics, governance and compliance)	Complex platform; high/inflexible pricing; smaller BI practitioner community
ServiceNow (Pyramid Analytics)	Pyramid Analytics	Flexible deployment; end-to-end analytics (semantic modeling, reporting and data science); strong data preparation	Post-acquisition uncertainty (ServiceNow acquired Pyramid in March 2026, creating short-term roadmap/integration uncertainty); lower market visibility; smaller ecosystem
Strategy	Strategy / Mosaic	AI-ready semantic layer (Mosaic provides common business context across data sources); enterprise governance; open/interoperable architecture (APIs, MCP and open semantic standards)	Cloud transition pressure (legacy customers may face migration effort); data preparation gaps; premium perception (often viewed as a higher-cost platform)
Tellius	Tellius Insight Platform	Industry-specific AI apps; autonomous workflows; automated semantic modeling (AI profiles data, infers joins and creates measures/dimensions)	Limited global footprint; lower momentum; gaps in large-scale report distribution (weaker automated delivery of high-volume operational reports)

[Ganesan et al., 2026]

Challengers

Vendor	Main Product	Strengths	Weaknesses
Alibaba Cloud	Quick BI	Strong China ecosystem; flexible pricing; advanced analytical agents (multistep analysis across structured and unstructured data)	Geographic dependency (market momentum concentrated in China); interoperability effort (more setup in heterogeneous/non-Alibaba environments); BYOLLM/model availability varies by region
Domo	Domo AI and Data Products Platform	Low-code data prep; AI orchestration (builds AI agents with human review points); composable embedded delivery (analytics can be embedded in portals/apps and extended with workflows)	Limited semantic modeling; consumption pricing uncertainty; support/community concerns

[Ganeshan et al., 2026]

Niche Players

Vendor	Main Product	Strengths	Weaknesses
Incorta	Incorta Analytics	Fast time to value for ERP data; domain data apps (prebuilt applications for ERP areas such as finance, supply chain and manufacturing); governance controls (certified views, lineage and row/column security)	Limited geographic presence; overlapping platform positioning (competes partly with data-management/warehouse automation tools); narrower general-purpose fit (strongest for ERP/operational analytics)
Sigma	Sigma	Spreadsheet-style UX; cloud data stack fit (directly queries platforms such as Snowflake, BigQuery and Databricks); warehouse-native data apps (analysis stays in the warehouse and can support write-back/actions)	Limited global presence; cloud-only deployment; maturing agentic capabilities (newer and less developed for diagnostics, clustering and proactive anomaly detection)
Zoho	Zoho Analytics	Strong Zoho ecosystem; accessible analytics; broad SMB fit (well suited to small and midsize organizations seeking simpler self-service analytics)	Enterprise-scale limitations; lower visibility; fewer advanced agentic capabilities

[Ganeshan et al., 2026]