

# IDC MarketScape: Worldwide Data Intelligence Platform Software 2024 Vendor Assessment

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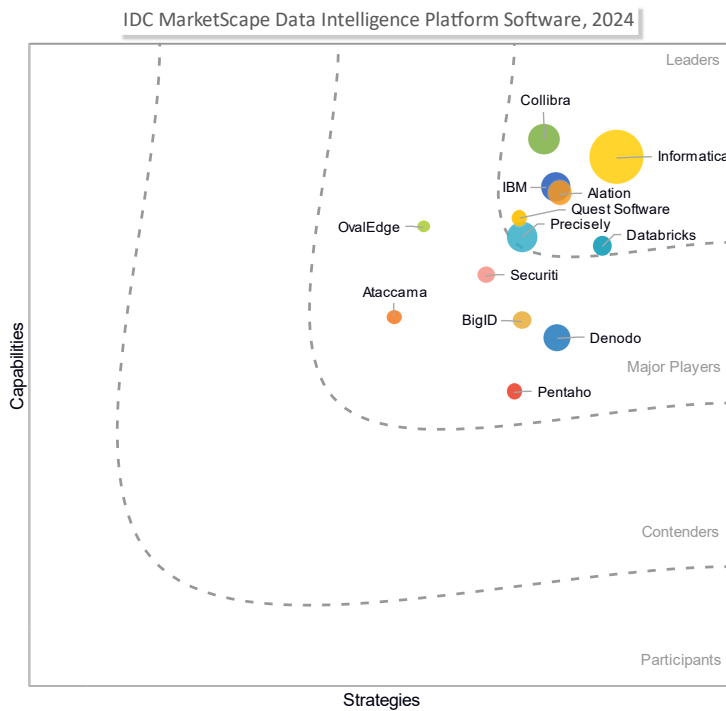
Marlanna Bozicevich

**THIS EXCERPT FEATURES QUEST SOFTWARE AS A LEADER**

## IDC MARKETScape FIGURE

**FIGURE 1**

### IDC MarketScape Worldwide Data Intelligence Platform Software Vendor Assessment



Source: IDC, 2024

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

## ABOUT THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide Data Intelligence Platform Software 2024 Vendor Assessment (Doc # US51467224).

## IDC OPINION

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Data intelligence, that is, intelligence about data, is a term IDC has been using since 2016 and really started to leverage it in 2018 when organizations were looking for technology to help with new regional regulations that were emerging (i.e., GDPR). As software capabilities matured and technology companies began to latch onto the data intelligence term, a new market category emerged. IDC has been tracking and forecasting the size of the data intelligence software market category since 2018, by aggregating four submarkets: data quality (DQ), master data intelligence, database life-cycle management, and metadata management inclusive of data cataloging and lineage, business glossaries, and data dictionaries.

IDC MarketScape evaluations of data catalog software published in 2020 and 2022 found that data catalogs were often bundled with complementary capabilities such as stewardship, lineage, quality, and product hubs or internal data marketplaces, clearly indicating consolidation of such capabilities into broader platforms. The result is an evolution of the IDC data catalog software evaluation into a data intelligence software platform evaluation in 2024, with a focus on data stewardship, cataloging, lineage, quality, and data product hub/marketplace functionality.

While IDC includes master data intelligence (MDI) in the data intelligence market definition, MDI is related to the broader master data management (MDM) competitive market that IDC tracks, and it would be better evaluated as part of an IDC MarketScape focused on MDM.

The data intelligence platform software market is rapidly evolving, driven by the need for AI-ready data. According to IDC's *Office of the CDO Survey* fielded in the summer of 2024, 83% of organizations have changed their data strategy since the emergence of generative AI (GenAI). That change is an increase in focus, with over half of the organizations stating that data management focus has significantly increased or is now the top focus for the organization. Objectives include supporting AI initiatives by improving the quality of data and analytics products and improving data security and privacy. Data intelligence software inclusive of data stewardship, data cataloging, data quality, data lineage, and data product hubs (internal data marketplaces) provide key capabilities in support of AI initiatives and the need to deliver AI-ready data.

Data governance ensures compliance and security, while data cataloging and lineage provide transparency and traceability. High data quality is essential for accurate AI outcomes, and data product hubs or internal marketplaces facilitate data sharing and utilization. These capabilities are underpinning data management transformation within an enterprise intelligence architecture, where intelligence about highly distributed, diverse, dynamic, and dark data informs policy and control of data access, movement, and utilization of integrated, curated, and annotated domain-oriented data products. Data observability monitors data drift and shift in real time as data is synthesized with analytical and AI models for use in data-driven business activities and AI-fueled business.

Many of the vendors evaluated in this IDC MarketScape helped define the data intelligence software market category. There is still some interpretation of the definition as we see software vendors focused on data privacy and security leveraging data intelligence in a slightly different manner than those focused on data intelligence for analytics. There are also vendors that extend the definition to include leveraging intelligence about the data to deliver intelligence from the data, leveraging intelligent automation. These multiple interpretations are proof of the utility of data intelligence, applicable across multiple domains, applications, and use cases, from data engineering to governance and control and from analytics to machine learning and AI. Intelligence about data is critical in enabling the intelligent enterprise in modern times.

## **IDC MARKETSCAPE VENDOR INCLUSION CRITERIA**

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A critical point in this research effort is to meet the following inclusion criteria:

- The vendor offers a data intelligence software platform as one product with data catalog, data governance/stewardship, data lineage, data quality management, and optionally an internal data marketplace. At a minimum, data catalog and basic lineage capabilities need to be native intellectual property of the software vendor. Partner- or OEM-provided IP is acceptable for data governance/stewardship, advanced data lineage, data quality management, and internal data marketplace capabilities.
- The data intelligence software platform being evaluated by IDC is the strategic data intelligence solution for the vendor.
- The vendor has at least \$25 million in revenue for 2023, specifically from the data intelligence platform software offering regardless of where it is deployed.
- The vendor operates in North America and recognizes a minimum of 5% of revenue from the Americas and at least one additional global region (EMEA and AP).

## ADVICE FOR TECHNOLOGY BUYERS

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- As with any technology procurement initiative, understanding the requirements of your organization is the most critical first step. Procuring software that is not able to meet your requirements or expectations will result in less-than-optimal adoption and possibly even a failed initiative. Challenge vendors to demonstrate effectiveness of their technology with your data, within your technology environment, applied to your data intelligence use cases.
- Vendors should be used that provide strong AI and machine learning integration for automated data discovery, classification, and quality management, as these features enhance productivity and data accuracy.
- There is a growing demand for intelligence about all data, structured and unstructured, primarily driven by the need to support generative AI use cases. The amount of unstructured data in an organization is greater than the amount of structured, and much of it is dark — meaning it hasn't been discovered, tagged, or classified. Organizations should include unstructured data types in their list of data intelligence requirements and look at vendors in the market able to support structured and unstructured data for meeting future needs of AI use cases, increasing insights, and reducing liability.
- Decision-makers should evaluate data intelligence software platforms based on support of multicloud and hybrid environments, ensuring flexibility and scalability in data management and governance across diverse data ecosystems.
- The use of data intelligence platforms with comprehensive capabilities should be prioritized, including data cataloging, governance, lineage, quality, and data product hubs in support of delivering AI-ready data to AI initiatives.
- Software vendors with robust partner ecosystems and customer success programs are critical for effective implementation, ongoing support, and maximizing the value of data intelligence investments.

## VENDOR SUMMARY PROFILES

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This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

## Quest Software

After a thorough evaluation of Quest Software's strategies and capabilities, IDC has positioned the company in the Leaders category in this 2024 IDC MarketScape for worldwide data intelligence platform software.

erwin Data Intelligence by Quest empowers businesses to manage and develop data pipelines efficiently, ensuring faster insights and robust data protection. The platform integrates data cataloging, quality, literacy, and marketplace capabilities, facilitating data discovery, data and AI governance, and automated value scoring. It offers extensive data connectors, automated workflows, and powerful impact analysis, facilitating reliable data for AI and analytics. When paired with erwin Data Modeler, users can accelerate data product delivery with model-to-marketplace capabilities to govern and deliver high-value, trusted data across their enterprise. The solution emphasizes data visibility, governance, and quality, catering to both IT and business users.

Note that Quest Software was assessed based on capabilities and overall strategy at the time of evaluation, meaning the new erwin Data Intelligence Cloud (released in August 2024 and hosted on Microsoft Azure) was not included in this assessment.

Quick facts about Quest Software are:

- **Product name:** erwin Data Intelligence
- **Company headquarters:** Aliso Viejo, California, United States
- **Year founded:** 1987
- **Employees:** 4,000
- **Top industry areas:** Financial services, retail, public sector, and education
- **Cloud:** At the time of evaluation, Quest has no SaaS offerings — see previously mentioned note regarding release of erwin Data Intelligence Cloud. Quest Software supports deployment as a single-tenant solution in a private cloud or on customer-managed infrastructure.
- **Pricing model:** Quest Software offers subscription licenses, priced by number of users.
- **Interesting fact:** Most people in the market still reference erwin as a data modeling solution and are not yet aware of the entire model to marketplace portfolio that Quest provides as outlined in its seven steps to maximizing data value data maturity model — Model, Catalog, Curate, Govern, Observe (lineage, DQ), Score, Shop. This specific tool has been a huge help in visually demonstrating the range of support erwin can provide a company within its data intelligence journey.

## Strengths

- When paired with erwin Data Modeler by Quest, erwin Data Intelligence can accelerate and support data product delivery initiatives by providing full model-to-marketplace capabilities, modeling the data product, generating code to retrieve data, mapping and automating associated data lineage, and facilitating all data product requests and data delivery through automated workflows within erwin Data Marketplace, included within erwin Data Intelligence. Also included, erwin Data Quality offers tightly integrated data quality capabilities and data quality scoring visible throughout data lineage, mind maps, impact analysis, and data literacy aids. Data observability and remediation capabilities are also available to monitor, alert and act on data drift that may be impacting operations and AI models.
- AIMatch is a capability in the erwin Data Intelligence platform that accelerates data classification and matching to technical assets, enabling data stewards to automatically act based on the percentage confidence in the match presented by the tool. erwin Data Quality also leverages self-learning AI/ML throughout its data quality capabilities, such as using ML to apply quality measures or monitoring rules. Generative AI capabilities are coming over the next 12 months to speed data stewardship in auto-discovery and suggestion of asset descriptions, definitions, and relationships. Centralized AI model curation and governance is available for customer use within erwin Data Marketplace. AI model information can be captured within a flexible framework, including intelligence such as model definition, description, business purpose, model type, date last trained, training data set links, model links, model owner/stewards, related policies, and a full audit history is automated for compliance reporting.
- erwin by Quest offers a Quick Start program to assist customers in accelerating implementation of erwin Data Intelligence. Aspects include joint application discovery sessions, product deployment assistance relative to installation, base configuration and product overviews, computer-based product training, live Q&A sessions, and data governance implementation workshops covering the data catalog, data lineage, governance, automation development, deployment, configuration, and testing of the platform. Ongoing customer engagement is supported by a new Value Attainment Program to gauge customers along a maturity model that identifies areas of the software employed or not yet employed that presents opportunity for customers to get more value out of erwin. This maturity model is called the 7 steps to maximize the value of your data from model to marketplace, helping customers build a practical road map to help customers focus on clarity and better business outcomes.

## Challenges

- The SaaS version of erwin Data Intelligence is new, having just been released in August 2024 with version 14. erwin Data Intelligence Cloud is opening new opportunities for customers to experience full capabilities and not have to sacrifice existing or future capabilities among three different deployment options, on premises, private hosting, and Quest hosted on Microsoft Azure. Customers should note, however, that the SaaS offering is relatively new, which may bring with it some additional risk.
- erwin by Quest has a valuable technology partner network, and while erwin customers are privately hosting erwin Data Intelligence on all major cloud platforms, currently erwin Data Intelligence Cloud is limited to availability on Microsoft Azure. As Quest learns more of how organizations will want to use erwin Data Intelligence Cloud, additional licensing and hosting options will follow to optimize value for customers and Quest.

## Consider Quest Software When

erwin by Quest is a good option for organizations that may already be familiar with the data modeling tool, but that is not a prerequisite. erwin by Quest is being used for enterprise data landscape visibility, data and AI governance, regulatory compliance and sensitive data classification, data marketplace, data literacy, and business user collaboration. Data and AI governance teams, business and IT data stewards, data owners, risk and compliance teams, data analysts, data engineers, and data scientists are also leveraging erwin by Quest for creation of data products, data lineage, and impact analysis, with quality insights. erwin Data Intelligence has a full array of data stewardship capabilities and automated workflows while delivering a consumer-like shopping experience for data and AI model discovery, collaboration, and governed data access that is appropriately fit for users of every technical level of expertise.

## APPENDIX

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### Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.



Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed. For this IDC MarketScape, vendor size was determined using IDC's 2023 Software Tracker, which represents an estimate of each vendor's 2023 software revenue. Submarkets include data quality, master data intelligence, metadata management, composite data framework, and dynamic data management systems.

## **IDC MarketScape Methodology**

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

## **Market Definition**

Data intelligence leverages business, technical, relational, and operational metadata to provide transparency of data profiles, classification, quality, location, lineage, and context, enabling people, processes, and technology with trustworthy and reliable data. Data intelligence software collects, organizes, classifies, and maintains this collection of metadata that makes up data intelligence.

For this IDC MarketScape, data intelligence platforms include software with data definition, profiling, quality, lineage, cataloging, and stewardship (governance) capabilities.



### Related Research

- *AI-Ready Data: Foundation for AI-Fueled Business* (IDC #US52607724, September 2024)
- *Architecting the AI-Fueled Business, 2024: Effective AI Adoption Requires a Business Operational Plan and a New Technology Operating Model* (IDC #US52576424, September 2024)
- *IDC Survey Spotlight: Has Generative AI Impacted Data Management?* (IDC #US52535524, September 2024)
- *Making the Case: Data Governance for GenAI — Applying New Data Value Chains in the Enterprise* (IDC #US52520924, August 2024)
- *Worldwide Data Integration and Intelligence Software Market Shares, 2023: Hydrating AI* (IDC #US51712324, June 2024)

### Synopsis

This IDC study evaluates the evolving data intelligence software market, driven by needs for AI-ready data. It highlights 13 key vendors — Alation, Ataccama, BigID, Collibra, Databricks, Denodo, IBM, Informatica, OvalEdge, Pentaho, Precisely, Quest Software, and Securiti — assessing their strengths, challenges, and suitability for various data management and AI initiatives. The document underscores the importance of data governance, quality, lineage, and cataloging in supporting AI and data-driven business activities.

“Data intelligence platform software is key to helping organizations deliver AI-ready data products for synthesis and utilization in business activities,” says Stewart Bond, vice president, Data Intelligence and Integration Software research at IDC. “Each vendor in this evaluation is doing something unique in terms of bringing AI to data using AI automation in the software, improving the productivity and outcomes of data workers in making data ready for AI initiatives in the organization to improve business outcomes.”

## ABOUT IDC

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International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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