IDC MarketScape

# IDC MarketScape: Worldwide Decision Intelligence Platforms 2024 Vendor Assessment
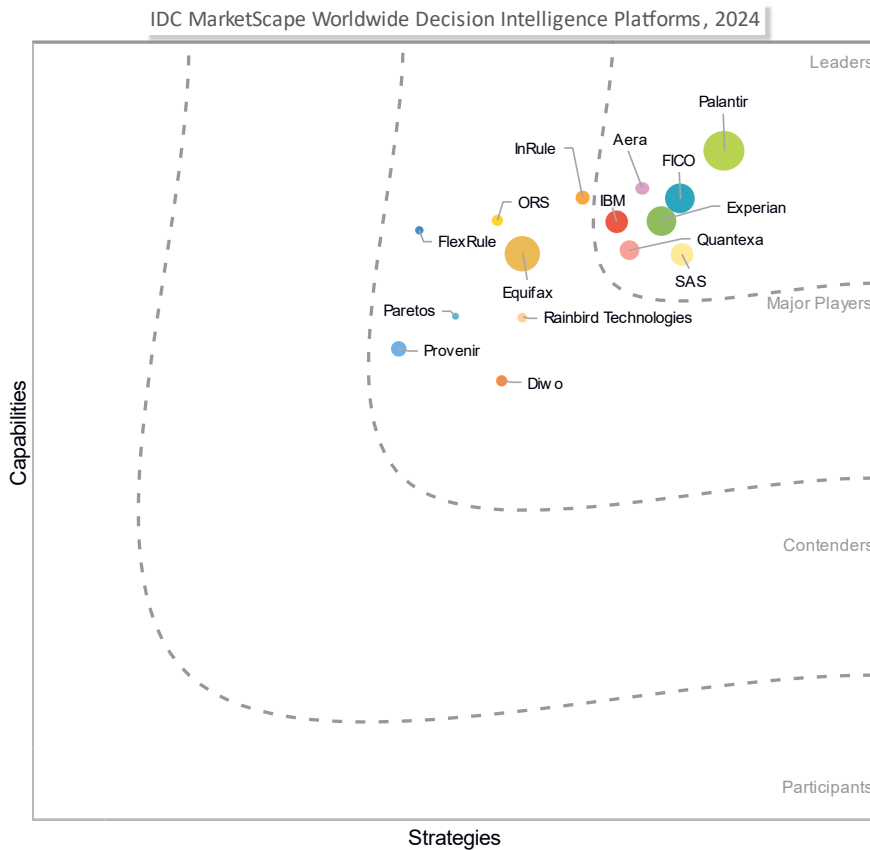
Marlanna Bozicevich          Megha Kumar

## THIS IDC MARKETSCAPE EXCERPT FEATURES SAS

## IDC MARKETSCAPE FIGURE

**FIGURE 1**

**IDC MarketScape Worldwide Decision Intelligence Platforms Vendor Assessment**



IDC MarketScape Worldwide Decision Intelligence Platforms, 2024

Source: IDC, 2024

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

## IDC OPINION

IDC defines decision intelligence (DI) as being a discipline and technology that helps organizations design, engineer, and orchestrate decisions by fully or partially automating all the steps in the decision-making process.

Why should organizations consider decision intelligence? Traditionally, decision-making would largely involve ensuring that decision-makers have access to the data that they need to make decisions, relying heavily on human interpretation of data while being aided by basic analysis. However, given the exponential growth in data, the fact that organizations make more complex decisions and on a more frequent basis requires organizations to seek solutions that will enable them to govern and orchestrate decision-making at scale.

It is also important to understand that decision intelligence is different from business intelligence (BI) and artificial intelligence (AI)/machine learning (ML). In business intelligence, users can understand trends, outliers, and track metrics, while with AI/ML, it allows for predictive and pattern recognition capabilities. Decision intelligence incorporates different aspects of both BI and AI/ML but focuses on automating aspects of decision-making and based on the complexity of the decision will require humans in the loop.

This IDC study assesses vendors in the worldwide decision intelligence software platforms market. This research, which was conducted during the second half of 2023 and the first quarter of 2024, is based on the IDC MarketScape methodology. Key findings include the following:

- Vendors within this market have a range of deployment options from on premises to cloud, given that for some of the use cases require customers to adhere to data residency or sovereignty requirements.

- While AI capabilities continue to be incorporated into these applications, functionalities around generative AI (GenAI) are being added by vendors. Leveraging GenAI for decision intelligence will be based either by role (i.e., developer or user) or by use case.

- Ease of use is a major focus for vendors within this space and while investments are being made around low-code/no-code capabilities, many customers highlighted the need for support directly from the vendor or their partner around decision design. There is a need for more support and training as vendors expand their use case capabilities around decisioning.

- Given the current economic climate, the need for complex decisioning will only rise and become pervasive across different lines of business providing an opportunity to vendors to explore decision-making use cases across different lines of business.

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

To be evaluated in this IDC MarketScape, a software vendor had to meet the following inclusion criteria:

- The vendor supports all three aspects of decision intelligence: decision design, decision engineering, and decision orchestration.
- The vendor is not specialized in any one single industry or business process vertical.
- Software being evaluated must be in a production environment for more than six months.
- Software must include some decision workflow design and have embedded AI/ML capabilities.
- The vendor must have market presence and momentum based on IDC inquiry volume.

Exclusions include vendors with broad portfolios of software or cloud services for many of the functional requirements of decision intelligence software that have not been packaged into one seamless decision intelligence software offering.

## ADVICE FOR TECHNOLOGY BUYERS

- Ensure that the organization has a clear understanding of the use cases for which it intends to leverage decision intelligence (i.e., there is a proper understanding as to what aspects of the decision-making process the organization seeks to automate and what aspects will require humans in the loop). During the selection process, ensure the vendor has expertise within your industry and use case.
- Take stock of the data that solution needs to leverage, both external and internal sources. It is important to ensure the solutions being leveraged will ensure data security, privacy and, in some cases, residency based on the regulatory requirements.
- Note that during the evaluation process, aspects such as integration to other systems, scalability, ease of upgrades, and the ability of the solution adapt to changing market dynamics and requirements.

- Consider how the organization is going to build out their decision workflow. While most vendors provide no-code/low-code capabilities, it is important to consider the training and support being provided by the vendors as well as evaluate the ease of use for both developers and business users.
- Evaluate the availability and road map around the latest decision and AI/ML capabilities as well as incorporation of generative AI.
- Note that partner ecosystems will be critical to scale adoption, hence it is important to consider decision intelligence vendors that have professional services partners that meet the requirements of your organizations.

## VENDOR SUMMARY PROFILES

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.

# SAS

SAS is positioned in the Leaders category in this 2024 IDC MarketScape for worldwide decision intelligence platforms.

SAS Intelligent Decisioning is a cloud-native SaaS platform that enables enterprises to follow a more standardized and structured decisioning process while leveraging both human and technology strengths to better address the problem. It offers augmented decision-making through data-driven insights and human intervention. This platform has core capabilities for decisioning, model management, Viya services, data management, event stream processing, and process orchestration. This platform is a generalized offering, but customers often fall in the financial services and insurance sectors. The software is available through the main public cloud providers as well as on premises.

SAS Intelligence Decisioning's customer input and IDC analyst evaluation point to the strengths and challenges that are described in the sections that follow.

## Strengths

- Scalable platform for real-time decisioning
- Ease around development of decision flows and business rules using UI and low-code capabilities
- Flexibility using different programming languages for model deployments

## Challenges

- Clients highlighting need for improvement around project resource allocation and customer communication
- Need for improvement in change management communication during upgrade cycles

## Consider SAS When

Consider SAS for decision intelligence if your organization is seeking scalable platform with extensive partner ecosystem and support uses cases around fraud and risk decision planning, sales and operations planning, financial planning, and customer engagement planning.

## APPENDIX

# 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 the vendor 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.

# 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 in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

# Market Definition

IDC defines this market as the software technology that helps organizations design, engineer, and orchestrate decisions by fully or partially automating all the steps in the decision-making process:

- **Decision design** provides functionality for users to define business goals or desired outcomes; map decision-making workflows, including feedback loops and approval points; and identify choices and constraints that limit the available options of a decision-maker.

- **Decision engineering** provides functionality to organize the available data using semantic and/or ontological frameworks, analyze the data using a range of use case–specific methods that may include simulation, optimization, descriptive, and predictive analysis. The output of this process is a prioritized list of impact-weighted options or a recommendation presented to a decision-maker, or a fully automated decision made by the system.

- **Decision orchestration** provides functionality to monitor all elements of the decision-making workflow (e.g., rules, algorithms, data sets, approval hierarchies, goals, constraints, and decisions), and enable their ongoing or periodic adjustment based on automated and human-generated feedback loops. Orchestration also enables ongoing learning about decision-making processes and outcomes of decisions by providing functionality to catalog and analyze these decision intelligence artifacts.

To be considered a decision intelligence software by IDC, the software product should be packaged for that purpose.

## Related Research

- *AI Readiness Drives Enterprise Intelligence, 2024* (IDC #US52085324, May 2024)
- *IDC Market Glance: Business Analytics and Decisioning Software, 1Q24* (IDC #US51520724, January 2024)
- *IDC FutureScape: Worldwide Data and Analytics 2024 Predictions* (IDC #US51295223, October 2023)
- *A Case for Decision Intelligence: From "What Data Is Needed?" to "What Decisions Need to Be Made?"* (IDC #US50788523, June 2023)
- *IDC MarketScape: Asia/Pacific (Excluding Japan) Analytic Data Platforms for Decision Support 2023 Vendor Assessment* (IDC #AP48959322, April 2023)

## Synopsis

This IDC study represents a vendor assessment of decision intelligence platforms vendors through the IDC MarketScape model. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and one another. The study highlights the factors expected to be the most influential for technology buyers as they seek new software to support decision design, engineering, and orchestration as well as the ability to understand the impact of the decisions being undertaken by the organization. This assessment can be used to help define a short list of vendors.

"The pressure to engage in data-driven decision-making continues to rise with organizations having to make multiple types of decisions on a regular basis. The need to automate certain aspects of the decision-making process while sustaining control and monitor impact will drive the adoption of decision intelligence across certain business functions and industries," said Megha Kumar, research vice president, Analytics and AI, IDC.