



# IDC Market Glance

Enterprise Performance Management and Analytic Applications, 1Q22

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# IDC Market Glance: EPM and Analytic Applications

Enterprise Performance Analysis and Planning Applications																
Enterprise and Financial Planning, Budgeting, and Forecasting Apps						Objectives & Key Results and Balanced Scorecard Apps										
IBM	Anaplan	SAP	workday	ORACLE	planful	insightssoftware	ena	UNIT4	Gtmhub	Ally	PROFIT.CO	Culture Amp	WorkBoard	Lattice	Unlock	perdo
OneStream	board	SYNTELLIS	Prophix	infor	prevedere	UNICOM Systems, Inc. A Division of UTECOM Global	jedox	15five	OnStrategy	Spider Strategies	smartdraw	Rocket	CORPORATER	inetSoft open standards innovation	BSC DESIGNER	ClearPoint Strategy
Financial Close and Consolidation Apps				Profitability Measurement and Reporting Apps				Enterprise Risk Management Apps								
IBM	planful	board	OneStream	workday	Synoptix	centage	board	workday	Wolters Kluwer	ORACLE	SAS	RESOLVER	Onspring	FUSION	LOGICGATE	
soliver	sage Intacct	softledger	Prophix	AccountsIQ	LucaNet	quick CONSOLS	SYNTELLIS	SAP	ena	OneStream	AUDITBOARD	SAS	StandardFusion	LogicManager		
Operational Business Function Analytic Applications																
Enterprise Asset Management Analytic Apps			Production Planning Analytic Apps			Workforce Analytic Apps										
SAP	IBM	ORACLE	ACCRUENT	FLUKE	HEXAGON	SAP	ORACLE	PLEX	kinaxis	E2OPEN	SAP	ORACLE	ADP	UKG	workday	qualtrics
AVEVA	Hitachi Vantara	ABB	IFS	KloudGin	Rockwell Automation	DRESSBILT SYSTEMS	planet together	SIEMENS	MRPeasy	intelliHR	ChartHop	visier	ActivTrak	bamboohr		
Supply Chain Analytic Apps				Procurement and Spend Analytic Apps												
SAP	Smart SOFTWARE	voxware	SAS	CLOUDLEAF	IBM	Sievo	JAGGAER	GEP	corcentric	SpendHQ	Rosslyn Data Technologies	coupa				
ORACLE	BlueYonder	Manhattan Associates	LOBILITY	infor	ivalua	LEVADATA	ZYCUS	Scanmarket	basware	ORACLE	SAP Ariba					
Customer Intelligence Analytic Applications																
Analytical Marketing Applications			Analytical Customer Service Applications				Analytical Contact Center Applications			Analytical Sales Applications						
Adobe	Salesforce	ORACLE	SAP	Salesforce	SAP	ORACLE	zendesk	GENESYS	NICE	AVAYA	zendesk	Salesforce	SAP	ORACLE	infor	
SAS	Microsoft	acoustic	HCL	IFS	Medallia	Microsoft	amdocs	CISCO	VERINT	Google	CONCENTRIX	PROS	Microsoft	Veeva		
CISION	webtrends	Amplitude	servicenow	INTERCOM	VERINT	ALVARIA	Five9	LIVEPERSON	InsideSales	Zoho	Clari					

Source: IDC, 1Q22

For areas on which IDC publishes market share data, the top 3-5 market share leaders are represented. For areas on which IDC does not publish market share data, vendor selection is up to analyst discretion.

# IDC's Take

- The combined enterprise performance management (EPM) and business function analytic applications market is forecasted to have reach about \$20 billion at the end of 2021. This IDC Market Glance highlights three segments of this software market:
  1. Enterprise performance analysis and planning applications. These apps provide organizations with functionality to support processes such as enterprise or integrated planning, financial planning, budgeting, financial forecasting, financial consolidation, financial reporting, tracking objectives and key results, profitability analysis, and enterprise-wide risk analysis.
  2. Operational business function analytic applications. These apps provide organizations with data analysis functionality that is packaged by technology vendors for specific operational business functions. In this IDC Market Glance we are not attempting to include a comprehensive list of such analytic apps sub-segments nor are we include industry-specific analytic apps.
  3. Customer intelligence analytic applications. These Apps provide organizations with data analysis functionality that is packaged by technology vendors for the primary customer-centric processes of sales, marketing, customer service, and contact center. In this IDC Market Glance we are not highlighting advertising and commerce analytics apps, which can be found in IDC Market Glance: Customer Intelligence and Analytics, 2Q21 (IDC #US47996321)
- The user personas of EPM and business function analytic applications are widespread across an organization, including those in the office of finance as well as functional areas such as sales, marketing, human resources, operations, logistics, inventory, procurement, and others.
- Key trends affecting supply and demand in this market include:
  - Public cloud deployments will continue to grow, with IDC forecasting that around 53% of the EPM market will be deployed in the public cloud by 2024, up from 30% in 2019. This is largely a result of major vendors migrating legacy customers to the cloud as well as helping new customers move to the public cloud. Many vendors are partnering with cloud infrastructure providers to achieve the scale and functionality that customers demand. As an example, Anaplan inked strategic deals with both AWS and Google Cloud while Workday announced a multi-year partnership with Google Cloud.
  - The availability of advanced analytics features, including infusion of AI/ML capabilities, which enable users to automate certain manual tasks, perform predictive analytics, and view key information or take specific action.
  - The practice of integrated planning will continue to expand rapidly across enterprises, with a growing number expected to seek and find value in functionality that coordinates planning across various business functions such as sales, supply chain, operations, human resources, and others.
- EPM and business function analytic applications market is highly fragmented with many specialized vendors focused on specific market niches. There is opportunity for further market consolidation. Some recent examples of M&A activity include Anaplan's acquisition of Mintigo in August 2019, insightsoftware's acquisition of CALUMO in July 2021, IDBS's acquisition of Skyland Analytics in November 2021, and others.

# IDC Market Glance: EPM/Analytics Applications

## Segment Definitions



## Enterprise Performance Analysis and Planning Applications

### Enterprise and Financial Planning, Budgeting, and Forecasting Apps

- Applications that support both integrated or connected planning as well as financial planning, budgeting, forecasting and analysis processes.

### Objectives & Key Results and Balanced Scorecard Apps

- Applications that support specific performance management methodologies and frameworks.
  - *Objectives and Key Results (OKR)*: applications based on the management framework that allows organizations to define the goals they want to achieve, and track the various steps needed to accomplish them within a specific time frame.
  - *Balanced Scorecard (BSC)*: applications based on the methodology that enables organizations to track and measure specific business goals by focusing on four key metrics: financial, customer, business processes, and employee satisfaction.

### Financial Close and Consolidation Apps

- Applications that support both compliance with statutory requirements and management of financial consolidation, reporting, and adjustment processes across multiple entities and divisions.

### Profitability Measurement and Reporting Apps

- Applications to support detailed cost and profitability measurement and reporting processes.

### Enterprise Risk Management Apps

- Applications that helps organizations establish their risk appetite, conduct risk-adjusted performance management, and create and manage contingency plans as positive or negative risks are realized. This software market segment does not include the many specialized industry specific risk management functions.

# IDC Market Glance: EPM/Analytics Applications

## *Segment Definitions*



## Operational Business Function Analytic Applications

### Enterprise Asset Management Analytic Apps

- Applications that support data analysis and decision-making related to management of an organization's physical assets, including manufacturing equipment, mining machinery, oil rigs, fleets, buildings, vehicles, and others.

### Production Planning Analytic Apps

- Applications that support data analysis and decision-making activities related to the collaborative forecast and continuous optimization of manufacturing activities. Production planning applications span supply planning, demand planning, and production planning within organizations.

### Workforce Analytic Apps

- Applications that support data analysis and decision-making across human capital management processes that cover the entire span of an employee's relationship with the corporation as well as management of other human resources used by the enterprise, such as contingent labor, contractors, and consultants.

### Supply Chain Analytic Apps

- Applications that support data analysis and decision-making related to logistics, inventory management, and related business functions.

### Procurement and Spend Analytic Apps

- Applications that support data analysis and decision-making related to enterprise procurement and spending.

- **For more information on the various sub-segments, please refer to:**

- IDC Market Glance: Procurement, 1Q21 (IDC #[US43265218](#))
- IDC Market Glance: Asset Life-Cycle Management, 3Q21 (IDC #[US47985121](#))
- IDC Market Glance: Supply Chain Planning, 3Q21 (IDC #[US48065021](#))

