

Data Governance

Market Basics

Data governance is a space without a concrete, universally accepted definition. We stated this in the predecessor to this report, and it remains true now. However, that does not mean the space has been static in the intervening years. On the contrary, since our previous report there has been a great deal of change surrounding and regarding data governance. For starters, the space has matured significantly and, although no hard and fast definition of it has emerged, the products within the space have crystallised into a relatively standard form.

In general, data governance products now consist of broad, enterprise-spanning platforms that allow you to centralise management of your data and metadata assets, where management is treated as a broad term that includes, for example, ensuring that your data is trustworthy and of high quality, exposing it for access by your users, and enforcing compliance with both external regulations and internal policies across your system(s). What's more, it is common for said products to capture and manage what you might refer to as your governance assets: policies, organisational aims or goals, business meaning and context, and so on. In essence, these are informational assets that speak to what your organisation is, what it does, and what it wants and needs. Note that regulations (such as GDPR and CCPA) to which you intend to comply are prime examples of governance assets.

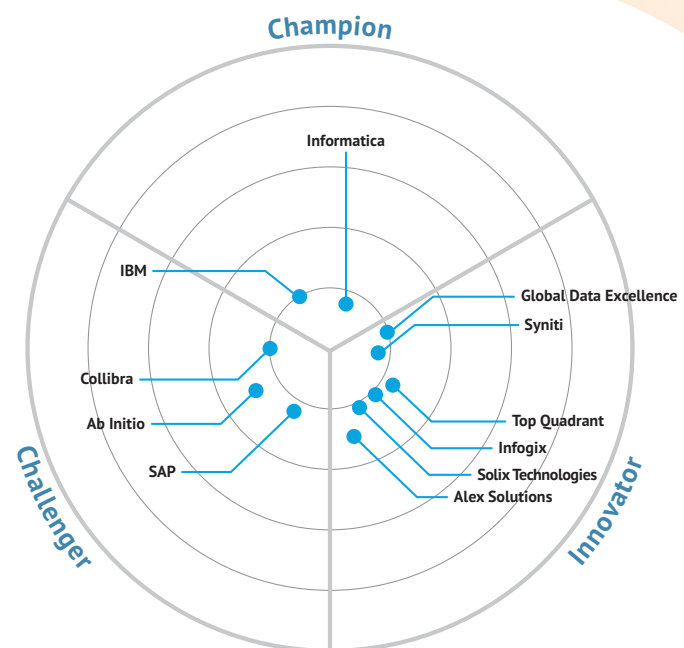
For many data governance products, a primary goal is to connect these governance assets to your technical data and metadata assets, thus imbuing the latter with concrete and easily comprehensible business relevance and meaning, ensuring regulatory compliance and enabling widespread organisational understanding. This is usually accomplished via a data catalogue and a business glossary. For example, you might define a business term – say, PII – in your business glossary, then associate it to a piece of data within your data catalogue. It should now be clear to anyone looking at that data that it is PII, because it is explicitly linked to the term declaring it as such. What's more, it will often be easy to click through to see exactly what it means for that data to be PII. The relationships within each category of asset – data to data, metadata to metadata, and governance to governance – are also important (for establishing data lineage and impact analysis, to

offer one example) and are generally highlighted in the same way.

Moreover, these capabilities are often highly collaborative, allowing your organisation to come together to decide what your assets mean and how they are used in practice. Some vendors go so far as to describe this process as a democratisation of your data assets, in which the understanding and tribal knowledge that already exists within your organisation can be captured, formalised, and shared openly. This has clear value.

It's also important to note that data governance platforms are just that: platforms. Accordingly, they will often come with a range of capabilities over and above the aforementioned data catalogues and business glossaries. Data quality, data lineage, role management, impact analysis and policy management are all common features offered by data governance vendors, although this is by no means a complete list.

Figure 1: The highest scoring companies are nearest the centre. The analyst then defines a benchmark score for a domain leading company from their overall ratings and all those above that are in the champions segment. Those that remain are placed in the Innovator or Challenger segments, depending on their innovation score. The exact position in each segment is calculated based on their combined innovation and overall score. It is important to note that colour coded products have been scored relative to other products with the same colour coding.



Taking all of this into account, and in the absence of a secure definition, we would like to offer a loose one: data governance is the means to orchestrate a variety of data management capabilities – including, but not limited to, data cataloguing, data quality, and policy management – consistently and across your enterprise in a way that is closely aligned with your business needs. To this end, data governance products should directly relate the management of your data to your desired business outcomes, then allow you to leverage said management to maximise those outcomes.

Market Trends

The data governance space has developed rapidly over the past few years. It has transitioned from a space that was fundamentally concerned with data quality to one that encompasses a much more general definition of governance. Although data quality is still a significant factor, it is now one of many ways in which data governance is able to ensure that your data is capable of providing you with real business value.

One of the major factors behind this change is, in a word, GDPR, which has been a significant driver for data governance since its inception. This is even more true now that it's come into full force, and particularly so for sectors which have not traditionally had to deal with strong data protection regulation (unlike, say, the healthcare and financial sectors). That said, GDPR is not the only regulation that's worth being concerned about. Many nations around the world, as well as regions within those nations (US states in particular), have either adopted or are planning to adopt their own data protection regulations. For a good and relatively well-known example, consider the CCPA: the California Consumer Privacy Act. While some of these regulations may be similar to GDPR, at least in broad terms, many will not be, and none will be totally identical. What's more, these regulations are inevitably going to change over time, likely in perpetuity. Taking all of this into account, you will need to be able to enforce different compliance standards on your data dynamically based on where it comes from and where it is stored, and to efficiently change those standards in the future. This is an almost perfect use case for the modern incarnation of data governance, and it's clear that it has been a motivating force for several products in the space.

Looking past regulatory compliance, the space is also dramatically more mature than it once was. Data cataloguing, data quality, policy management, data lineage and impact analysis are all very widespread, and although products may differ on the finer points, they are all generally delivered at a high quality. Accordingly, we can no longer pick a small handful of products that we consider best-of-breed, and this is reflected in the dramatically increased number of vendors covered in this report. What's more, we consider all of these vendors to be competent and fit for purpose data governance solutions.

To a significant extent, the capabilities listed above have become ubiquitous, at least in their most basic forms. Differentiators are now much more likely to be a particular emphasis, or even a single standout feature, than broad swathes of capability or competency. In fact, there are two major capabilities within the space that are increasingly (and broadly) considered selling points: data democratisation, the ability to easily share, consume and collaborate on your data and metadata assets; and automation (particularly AI and machine learning driven automation), which is self-explanatory. Both of these capabilities add significant value to data governance as a prospect, and it is no surprise that a number of vendors are beginning to emphasise them.

Data catalogues, in particular, were a growing trend in the space when we examined it in our last report. Now, they are practically universal. This is certainly a good thing for data governance, but it is important to note that it is only one of many spaces that have wholeheartedly adopted the data catalogue. There is a danger that this could lead to a proliferation of data catalogues, where organisations accrue several catalogues that cannot communicate and therefore form silos over the spaces they pertain to. Given the catalogue's role in centralising access to, and understanding of, your data assets, this is extremely unfortunate, and in many ways defeats its purpose. What's more, it highlights a particularly important (yet rarely emphasised) capability within data catalogues, and therefore within data governance: the ability to integrate with other data catalogues, and therefore prevent silos from forming. Alternatively, a data catalogue could address this issue by adopting an open standard such as ODPi Egeria. Note also that we expect this feature to become more important over time as more and more products and spaces start to leverage their own data catalogues.

Vendors

As mentioned, the data governance space is fairly mature, and so too are many of the vendors that operate within it. In fact, several of the vendors we cover in this Market Update were featured in our previous report, including Informatica, Collibra, TopQuadrant and Global Data Excellence (GDE). Syniti was also featured, although it has since undergone a significant rebranding (it was then known as BackOffice Associates). Of the others, several are new to the report but very much not new to the space, including Solix Technologies, SAP and Ab Initio. Alex Solutions, on the other hand, is one of the newest additions to both the space and the report, and is the youngest vendor covered by a significant margin. Infogix, finally, is an interesting case, in that they themselves were not included in our previous report, but DATUM, which Infogix has acquired and integrated into their own data governance solution in the time since, were.

In terms of movement within the market, the aforementioned acquisition of DATUM by Infogix has been the most significant piece of news. In addition, Collibra acquired SQLdep in early 2019, and is presently leveraging its capability to deliver automated data lineage. BackOffice Associates rebranding itself as Syniti was also mentioned above.

Metrics

There are a variety of factors that have gone into the evaluation of the products included in this report. As a brief summary, we are particularly considering each product's ability to provide a solution for metadata management (and, in particular, a highly automated solution); its readiness in helping you to achieve regulatory compliance through both policy management and other means; its ease of use; its capability in enabling collaboration and data democratisation; and, last but certainly not least, the degree to which it is business oriented and how well it allows you to derive business value from your data governance.

Conclusion

Data governance, as a space, has matured significantly over the past few years. The data governance products available to the market have matured as well, and even features that would have stood out as exceptional a few years ago are fairly standard today. What's more, compliance regulation the world over has led to a substantial – and increasing – need for data privacy and regulatory compliance, and the new trends within the space enable many data governance solutions to be highly effective at both building trust in and democratising your data. In short, data governance is both highly desirable and more vital than it has ever been before.



About the author
DANIEL HOWARD
Analyst

Daniel started in the IT industry relatively recently, in only 2014. Following the completion of his Masters in Mathematics at the University of Bath, he started working as a developer and tester at IPL (now part of Civica Group). His work there included all manner of software and web development and testing, usually in an Agile environment and usually to a high standard, including a stint working at an 'innovation lab' at Nationwide.

In the summer of 2016, Daniel's father, Philip Howard, approached him with a piece of work that he thought would be enriched by the development and testing experience that Daniel could bring to the table. Shortly afterward, Daniel left IPL to work for Bloor Research as a researcher and the rest (so far, at least) is history.

Daniel primarily (although by no means exclusively) works alongside his father, providing technical expertise, insight and the 'on-the-ground' perspective of a (former) developer, in the form of both verbal explanation and written articles. His area of research is principally DevOps, where his previous experience can be put to the most use, but he is increasingly branching into related areas.

Outside of work, Daniel enjoys latin and ballroom dancing, skiing, cooking and playing the guitar.

Bloor overview

Technology is enabling rapid business evolution. The opportunities are immense but if you do not adapt then you will not survive. So in the age of Mutable business Evolution is Essential to your success.

We'll show you the future and help you deliver it.

Bloor brings fresh technological thinking to help you navigate complex business situations, converting challenges into new opportunities for real growth, profitability and impact.

We provide actionable strategic insight through our innovative independent technology research, advisory and consulting services. We assist companies throughout their transformation journeys to stay relevant, bringing fresh thinking to complex business situations and turning challenges into new opportunities for real growth and profitability.

For over 25 years, Bloor has assisted companies to intelligently evolve: by embracing technology to adjust their strategies and achieve the best possible outcomes. At Bloor, we will help you challenge assumptions to consistently improve and succeed.

Copyright and disclaimer

This document is copyright ©2020 Bloor. No part of this publication may be reproduced by any method whatsoever without the prior consent of Bloor Research.

Due to the nature of this material, numerous hardware and software products have been mentioned by name. In the majority, if not all, of the cases, these product names are claimed as trademarks by the companies that manufacture the products. It is not Bloor Research's intent to claim these names or trademarks as our own. Likewise, company logos, graphics or screen shots have been reproduced with the consent of the owner and are subject to that owner's copyright.

Whilst every care has been taken in the preparation of this document to ensure that the information is correct, the publishers cannot accept responsibility for any errors or omissions.

