TIBCO Acquires Orchestra Networks to Bolster Data Mastering Capabilities
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By: Stewart Bond

IDC's Quick Take
TIBCO continues to invest in data integration and integrity capabilities with its latest acquisition of Orchestra Networks, a provider of master and reference data management software. TIBCO acquired the former Composite Software assets from Cisco in November 2017 to support the growing demand for data virtualization. TIBCO acquired Scribe in June 2018 to enhance its cloud presence and SaaS application integration capabilities. The Orchestra Networks acquisition accelerates TIBCO's growth in the $6.6 billion global data integration and integrity software market. More specifically, TIBCO gains a foothold in the market for data intelligence, providing a bridge between TIBCO's two portfolio groups covering integration and analytics. The Orchestra Networks EBX platform can master shared data assets for integration and analytics across the portfolio, helping organizations improve governance, management, and consumption of information.

M&A Announcement Highlights
TIBCO has acquired privately held Orchestra Networks, which was founded in Paris, France, in October 2000. Orchestra is approximately a $30 million vendor with 135 employees operating out of key locations in Paris, Boston, London, Frankfurt, and Hanoi. The company has more than 200 customers including some overlap with existing TIBCO customers.

The Orchestra Networks EBX platform will now be known as TIBCO EBX, providing master data, reference data, and metadata management. TIBCO EBX will add to the data integration and integrity capabilities of data virtualization, master data management, and data cleansing products that already exist in the TIBCO Connected Intelligence portfolio. A primary difference between EBX and the already existing TIBCO master data management (MDM) is in application. TIBCO MDM is primarily used to master transactional data, aligned with TIBCO's traditional messaging and process management capabilities. EBX gives TIBCO a broader focus on data mastering across multiple domains such as party (customer, supplier, employee), product, financial assets, and locations.

Orchestra Networks will become a business unit of TIBCO, dedicated to an emerging market of shared data asset management, enabled by data intelligence. As the Orchestra Networks staff and intellectual property is integrated into TIBCO, there will be opportunities for product integration and consolidation — but no formal road maps have been presented yet.

IDC's Point of View
Data alone does not distinguish the enterprise — how the enterprise is enabled by data is the differentiator. Data enablement requires governance, and governance requires data intelligence to deliver the right data to the right resource at the best time. Data intelligence software includes capabilities such as data stewardship and profiling, data cataloging, metadata management, and data
mastering. Each capability on its own is valuable, but when all can run on a common platform, sharing common metadata and providing a consistent user experience, data intelligence can improve data knowledge and literacy in an organization.

The Orchestra Networks acquisition by TIBCO accelerates TIBCO's capabilities in metadata management and multidomain data mastering that were gaps in the portfolio, if TIBCO wanted to become a contender in the data integration and integrity software market — a desire that is obvious using the Composite and Scribe acquisitions as markers of the journey. Composite added data virtualization and federation; Scribe added an integration Platform-as-a-Service (iPaaS) for data synchronization among cloud applications and infrastructure.

TIBCO goes to market with a message of Connected Intelligence, leveraging its portfolio of process integration and API management capabilities to interconnect everything, alongside offerings to augment intelligence in data analytics, preparation, virtualization, and management. This acquisition makes a lot of sense for TIBCO and its clients as it builds out capabilities under the Augment Intelligence portfolio of products, helping customers become enabled with data. TIBCO EBX combined with TIBCO Data Virtualization (DV) could be a powerful combination to provide visibility and accessibility to mastered and shared data assets, and EBX can inform DV of the relationships inherent in data for creation of virtual views. Orchestra Networks also benefits from the acquisition because they were becoming a small fish in the turbulent waters of data governance market activity. Orchestra Networks wanted an infusion of investment to broaden its functional and go-to-market capabilities to compete against larger players in the market with broader coverage of data integration and integrity functionality.

TIBCO also understands that it is entering a turbulent space of the market, not crowded but dominated by a few larger players with integrated platforms and deep intellectual property to fight currents in the market. However, big players also have technical debt whereas TIBCO is looking ahead, making smart decisions about where the market is heading, such as choosing data virtualization and not ETL because data is now too big to move around and entering the iPaaS market to improve cloud data synchronization capabilities and to broaden its out-of-the-box library of connectors. EBX now adds data integration with purpose, focused on mastering and intelligence for governance, management, and consumption of shared data assets. All these products are viable on their own and as such can continue to contribute to TIBCO's bottom line without significant change or integration, but such a model is a linear equation of value.

Alewife fish swim in unison within large schools, making many small fish appear as one large fish, protecting themselves from predators and providing an advantage when competing for food. Turbulence in the water or weaker fish in the school can break the optical illusion and the whole school can suffer. TIBCO is assembling a school of products that can logically operate together, appearing to be one solution while functioning independently. Each new acquisition can gain strength from the larger company, but for the school to stay together in the turbulent waters of the market, TIBCO needs to focus on integration toward a unified platform and provide an exponential model of value for customers.

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