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## 451 MIS Market Insight Service

## Market Development

Tibco/Spotfire updates in-memory analytics stack and gives future product pointers

Analyst: [Krishna Roy](#)

Sector: [Enterprise Software >>>](#)

Date: 14 Nov 2008

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## Event summary

- New visualizations for exploratory business intelligence (BI) are core to version 2.2. They include the introduction of a 3-D scatter plot and network graph. The debut of the Spotfire Technology Network is about positioning it as a development platform.
- So-called operational analytics, drawing on Tibco's complex event-processing (CEP) capabilities and other wares, is the direction in which it is heading. Further integrating statistical/data-mining software from its Insightful buy is also planned.
- Tibco is leveraging technology from assets bought from real-time BI player Syndera for \$1m in July. The acquired real-time monitoring tool won't be poured into Spotfire but is a tactical purchase being used in other parts of its business. The 451 take

## The 451 take

Tibco no longer breaks out revenue contributions from the \$195m Spotfire deal so it is hard to determine the financial effect the acquisition is having on its overall top and bottom lines. But from a product perspective, we think Spotfire is being well utilized and augmented by the purchase of ex-Spotfire partner Insightful for \$25m in June. That said, we'd like to see a more formalized focus on event-driven BI or operational analytics because it's an emerging area that would provide more competitive differentiation. Operational analytics is something Tibco has been touting since the Spotfire deal took place in May 2007, but it has yet to fully bake it into a product and market it as such.

## Details

Visual analysis has always been a key part of the **Spotfire** in-memory analytic stack, even before it was bought by **Tibco**. But the focus for the past two releases has been elsewhere (in mash-ups, for example). In 2.2 there's a return to introducing new visualizations. The 3-D scatter plot, which requires the Spotfire Professional and Enterprise Player desktop tools because it is a distributed in-memory application that requires memory on the server and desktop, gives the ability to filter, zoom and rotate data in 3-D. The Network Analytics add-on, which costs \$2,000 a year per seat under a three-year license, is for Spotfire Professional only. It is designed for business analysts to interactively explore and filter network data alongside time series and geospatial data and comes with APIs for custom layouts and calculation algorithms.

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The analytic platform is also expanding into directions complementary to visual analysis, including statistics and data mining, by embracing R and now S languages, **SPSS** and serial-attached SCSI integration and moving into operational analytics. Spotfire's take on the latter involves tapping Tibco's CEP, real-time integration, business process management (BPM) and service-oriented architecture (SOA) wares to further the ability to take action on business events for scenarios such as provisioning and customer incident management by telcos.

Competitive landscape

Players aside from Spotfire with a strong visual analytic bent include **Tableau Software**, Panopticon Software, **QlikTech International**, **JasperSoft**, **Pentaho** and **Visual Mining**. BI big guns **SAP/Business Objects**, **IBM/Cognos**, **Oracle**, **SAS Institute** and **Information Builders** are also strong in this area.

Spotfire is also not the only vendor to unite data mining/statistics with BI. Business Objects has a tie-up with SPSS for one of its latest offerings, Predictive Workbench XI 3.0. Pentaho and **InforSense** also have data-mining capabilities. Information Builders, which also has a partnership with SPSS, will deliver an add-on to its WebFocus enterprise reporting platform that draws on the R open source data-mining language by year-end. Other BI players are also making similar moves in a bid to enter the predictive analytics fray where SAS, SPSS, **KXEN** and **Angoss Software** are already strong, although their respective wares are more sophisticated.

We think Spotfire has an early lead in operational analytics by dint of its parent's strengths in real-time integration, BPM and SOA. That said, IBM, SAP, **Syndera**, **SeeWhy Software** and **AltoSoft** are also operating in certain pieces of this segment, albeit with different approaches. IBM is taking more of an SOA-based approach, for example, while SAP's strategy is more warehouse-centric. Syndera, SeeWhy and AltoSoft are emerging startups.

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[SPSS illuminates latest wares and predictive analytics business](#)

With a new release of its flagship statistical software and first visualization tool for nontechnical users waiting in the wings to ship, we take a look at the software veteran's latest offerings and its predictive analytics business in general. (21 Aug 2008)

[Tableau focuses on ease-of-use with latest visual analysis offering](#)

Version 4.0 sports improvements on both the desktop and server components such as new mapping facilities and integration with Web applications, websites and portals. Like previous releases, it's available on a free trial basis. (13 Aug 2008)

[Spotfire refreshes analytic stack as acquired firm continues to shine inside Tibco](#)

We take a look at Spotfire's financial contribution to the middleware stalwart's latest quarter and examine the new version of its flagship analytic stack, Tibco Spotfire 2.1. (15 Apr 2008)

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[Tibco plunges deeper into predictive analytic waters with Insightful buy](#)

The company is building on its Spotfire deal with the smaller strategic acquisition of Insightful – a longtime partner of Spotfire, for which the middleware stalwart paid \$195m last May to make a much-anticipated entry into BI. We take a closer look. (20 Jun 2008)