



Business Insights

For a clearer market perspective

The Future of Enterprise Mashups

Demand, challenges, and vendor opportunities



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Report Overview

Mashups, or composite applications, first came to prominence on the social and consumer web as users looked to make the most of the Web 2.0 technology at their fingertips. Enterprises were quick to see the business benefits of turning various data sources into services and 'mashing' them together on an ad hoc basis into unique applications without the need for complex coding – essentially, the opportunity existed for non-technical business users to very quickly create their own situational applications to help speed up their decision making processes. As the understanding of what could be possible grew, a large amount of hype was created over the potential of enterprise mashups. This report examines to what extent the real benefits and potential match the hype over what is one of the hottest, potentially disruptive emerging enterprise technologies, and provides actionable insight into how to approach the challenges and opportunities afforded by it.


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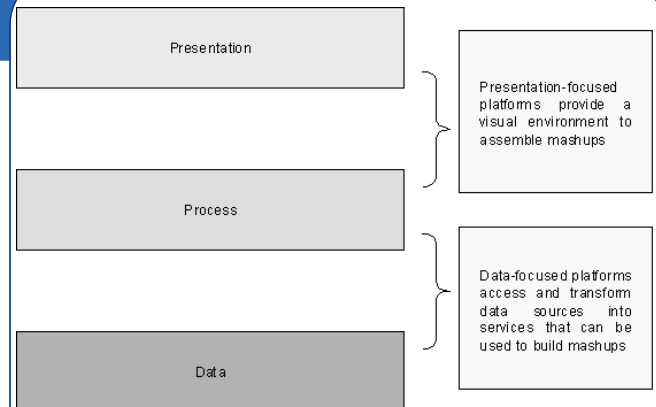
The report examines the market challenges and opportunities for enterprise mashups by analyzing the demand from organizations and end users, and looking at the current and predicted state of the market. It also considers the challenges to mashups in terms of competition from the existing software market, technical issues, and management culture. The report provides insight into the activities, views and strategies of the leading enterprise mashup players, and takes a look at the future possibilities for technological and market development in the space.

Key Findings

 **The enterprise mashup market was worth around \$161m in 2008, and is forecasted to grow to \$1.74bn by 2013.** Market growth will be driven by factors including the growing involvement of the major software players, evolving market definition and knowledge about mashups, emerging standards, increased uptake of SOA and cloud computing, and the impact of the recession.

 **About 32.8% of organizations surveyed by Business Insights used mashups.** Large organizations are more likely to have adopted mashups than smaller businesses. The majority of organizations that do use mashups plan to highly increase their usage in the future.

 **Efficiency and cost are the most important factors** for the majority of organizations when choosing a type of vendor to implement a new high priority software solution. Systems integrators and SaaS vendors are most trusted by CIOs to implement new software solutions, and are also the most popular type of partners for mashup vendors.



Different types of mashups – data, process and presentation

“At present, there is a distinct lack of knowledge about what exactly mashups are, the differences between types of mashup, and what they can do for businesses. Briefly, mashups can be divided into three layers: data; process; and visual presentation...”

Use this report to...

- **Establish the size of the enterprise mashup market** and identify growth drivers and patterns.
- **Identify the types of organization that are adopting mashups** by size and vertical industry.
- **Examine how mashups can satisfy the unmet enterprise need** and how attractive they are to end-users.
- **Identify key partnership opportunities** by establishing what type of vendors businesses trust most.
- **Identify the technical and market challenges** that stand in the way of mashup market growth, and explore ways to overcome them.
- **Gauge the disruptive potential of mashups** in comparison to their complementary nature.
- **Understand the IT Manager’s role in dealing with mashups** within organizations that adopt them.
- **Gain insight into the offerings and strategies** of key and emerging vendors in the enterprise mashups field.

Explore issues including...



The enterprise mashups market is in an immature phase. There is little definition, clarity and knowledge of the technology's different capabilities amongst many potential users. There is also a lack of industry-wide standards for vendors to comply to and assure clients with.



The majority of non-users are unaware of the capabilities of mashups. Vendors are in many areas far more optimistic about the benefits and risks of mashups than end-users, so successful marketing campaigns and educating the market will be key to growth.



Most of the major players in the IT application field have yet to make an impact in the mashup market, with the exception of IBM. As the innovative start-ups prove the value of the technology, the bigger players will bring their resources and customer bases to the market and drive growth further.



There is an open space in mashup market leadership. With the market in such an immature phase it is hard to gauge just which vendor may eventually emerge in a dominant position, but when clear leaders are identified it will help to drive overall market growth.



IT budgets are being squeezed because of the impact of the recession. The need for CIOs to improve efficiency while operating on a tighter budget provides an opportunity for mashup vendors.



The service oriented architecture (SOA) market is growing. This will have a positive affect on mashup market growth as the technologies are closely linked.

Discover...

- How big is the enterprise mashup market?
- What is driving market growth and Who is investing in the market?
- How many organizations use mashups? What types of organization are they?
- How can the open space in mashup market leadership be filled?
- What are the main IT priorities for organizations?
- What type of vendor do businesses trust most to implement new software solutions?
- How can vendors create successful partnership and marketing strategies?
- What aspects of mashup usage present risks? How can these risks be addressed?
- What are the leading players in the field offering? What are their growth strategies?
- What does the future hold for enterprise mashups?

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- The enterprise demand and unmet need
- Challenges and barriers to mashup market growth
- The vendor landscape
- The future of the enterprise mashup market

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