

TOP 10 ENTERPRISE MASHUP SOFTWARE PRODUCTS

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Overview

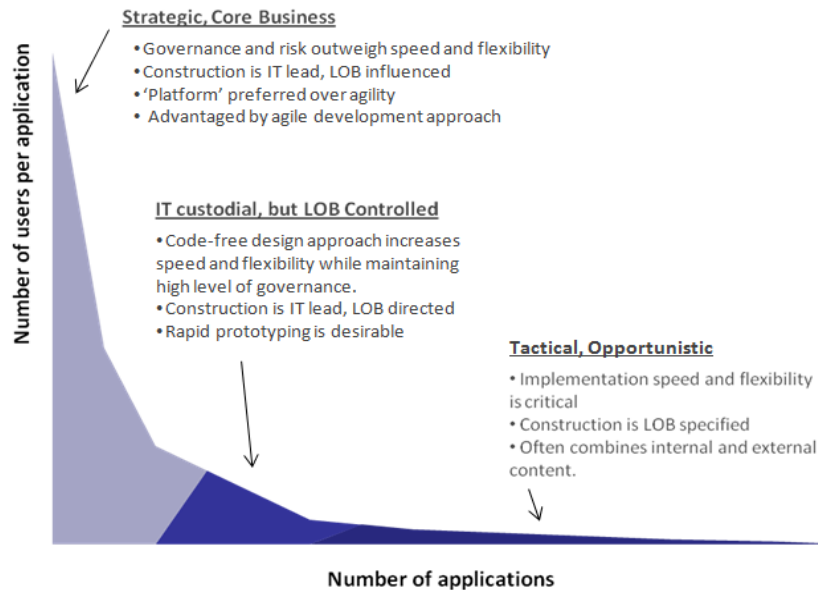


The growth in information working and the knowledge economy is placing new demands on information technology. Knowledge workers today expect the same level of access and ease of use from their business systems that they enjoy with their iPod or favourite websites (such as Google). A challenge facing IT departments is how to keep up with the volume of requests from information workers to develop new applications in response to their rapidly changing information needs. In a 2008 survey conducted by IBM, a majority of CEOs rated their organization's ability to manage change 22% lower than their expected need for change. The promise of enterprise mashups is to provide the tools web workers need to adapt their information services in the face of constant change, develop new insights, and act on new business opportunities.

Enterprise mashups are an important new development in IT as they provide a new and accessible means of creating vast numbers of business applications without requiring complex IT projects or similarly large numbers of IT people with deep technical skills. They offer organizations a way to rapidly adapt to changing business needs.

Unlike traditional IT development tools that focus on the small number of heavy-weight business applications that serve the majority of users, enterprise mashups are specifically designed to support the 'long-tail' of demand from small numbers of users, sometimes individuals, for a proportionately large number of relatively light-weight (and sometimes short-terms) business applications that information workers as individuals, or working in teams, need in order to respond to new business situations.

The long-tail of demand for software applications in business



Without enterprise mashup technologies these information applications would otherwise be poorly served by IT. The usual consequence of this is IT heads finding information workers serving themselves with self-made applications built using desktop tools such as MS Excel or MS Word (and the security risks and version control dangers this represents).

Origins of a new species of business applications

It was Luba Cherbakov of IBM, who is attributed with putting the term situational application (or SA) on the IT technologies ever growing list of acronyms. Cherbakov describes a Situational Application as - "...an application built to address a particular situation, problem, or challenge. The development life cycle of these types of applications is quite different from the traditional IT-developed, SOA-based solution. Situational applications are usually built by knowledge workers who adopt iterative development often measured in days or weeks, not months or years. As the requirements of a small team using the application change, the Situational Application often continues to evolve to accommodate these changes. Significant changes in requirements may lead to an abandonment of the used application altogether; in some cases it's just easier to develop a new one than to update the one in use."

"Situational applications - an application built to address a particular situation, problem, or challenge. The development life cycle of these types of applications is quite different from the traditional IT-developed, SOA-based solution..."

Enterprise mashup software applications (that produce situational applications) mean that the majority of information worker needs can be self-served by appropriately robust and scalable enterprise IT solutions. Applications are normally authored and deployed using Web based technologies (so called Web 2.0) that can harvest information from disparate sources to create composite applications - built using ready-made building blocks of applications components that are assembled using integrated point-and-click development environments designed specifically with non-IT people in mind.

Market sizing and opportunity

"According to their research the enterprise mashups software market is expected to generate global revenues of \$700 Million by 2013"

According to a report published in 2008 by IT industry analysts Forrester Research, mashup usage is growing rapidly. According to their research the enterprise mashups software market is expected to generate global revenues of \$700 Million by 2013 (Forrester defines mashups as "custom applications that combine multiple, disparate data sources into something new and unique").

In January 2007, an Economist Intelligence Unit survey revealed that mashups were the most popular traditional web 2.0 technology in the enterprise, with 64% of companies saying they already use or planned to use mashups within the next 2 years.

Situational applications are growing in popularity because business organizations seek to:

- **Unlock innovation** and the creativity in their business
- Need to increasingly work in consort with **industry partners** to achieve shared business outcomes
- Demand **information agility** to respond to rapidly changing market situations and therefore need to uncover business insights more speedily; often relying on a blend of information that exists within and beyond the enterprise fire-wall
- **Reduce application backlog without losing control and governance**
- Speed development of applications and reduce the cost and risk of applications development for the majority of knowledge worker applications that serve small groups of workers (and sometimes an individuals' specific information needs)

Assessment Method

This assessment is based on the terms of reference established by Microsoft in their excellent white paper on enterprise mashups (J.R. Arredondo, May 2008) that comes in two parts:

1. Capabilities that an enterprise mashup platform must display in order to ensure broad enterprise adoption across business users and also acceptance within the IT organization such as:

- Business user requirements.
- Easy to use for business users.
- Integrated with business users' daily work life.
- Powerful for power users to "finish the whole job."
- Social and viral.

2. The existence of key technical elements of a mashup platform:

- Access to a repository of web services that users and IT managers can employ to publish and manage corporate and public information that information workers can leverage in Enterprise Mashups.
- A gallery of visualization components that users can use to make sense of newly aggregated sources of insights.
- Mashup creation capabilities are easy to use by non technical users.
- Authored mashups create THE PORTAL ARCHITECTURE (i.e. User permissions, site layout, page layout, hierarchies and taxonomies etc.), not just component pages.
- A place where users can share the mashups they create and a social and collaborate workspace that supports the deployment and manageability of mashups for internal and external users - as well as the social networking capabilities that help people to connect with one another, create workspaces and data mashups within them.

The Top 10

So who are the key players in the Enterprise Mashups space? Here's our Top 10 of what we believe to be the most influencing products in the market today presented in reverse order:

10.

Corizon – A UK software business that originated from call centre and CRM integrations projects sponsored by British Telecom and has continued to develop its platform to serve the needs of call centre integrations market. This early verticalization of its proposition has enabled Corizon to rapidly develop a sound *raison-d'être* for its technology and through successive deployments the company has fashioned a robust enterprise mashup platform. However, the solution offered, whilst incorporating many of the attributes of enterprise mashups technology, does not meet the needs of the long-tail of business applications (or Microsoft's key functional determinants) and therefore sits at number 10.

Positives

Close integration into customer service and call centre departments

Negatives

Fails to meet the broad needs of features to serve the long-tail of business applications

9.

Just Systems – Headquartered in Tokyo, Just Systems is a global software provider with three decades of successful innovation in office productivity, information management, and consumer and enterprise software with over 2,500 customers worldwide and annual revenues over \$110M. Whilst not strictly speaking an Enterprise Mashups player, JustSystems – with its XFY technology - has developed an XML architecture for dynamic composite documents similar to Encanvas that makes it well positioned to become a leading player in the market over the next few years.

Positives

Clever cross-over technology based around XML that serves document and structured data workflows

Negatives

Fails to impress on enterprise portal deployments and data mashup dexterity

8.

Twinsoft – A French company, Twinsoft sees itself as a market leader in Enterprise Mashups. According to its website, its flagship product, Convertigo Enterprise Mashup Server helps companies reuse their existing assets to build new and exciting WEB 2.0 composite applications for a fraction of the cost and time needed to complete software rewrites or traditional development. It's a good story and the company has some very interesting case stories but its software platform relies heavily on Twinsoft's OEM relationship with DreamFace and to me looks very much like a consultancy-led offering rather than a coherent software application.

Positives

Rich Web 2.0 user interfaces

Negatives

Not an integrated product suite. Relies today on third party building blocks.

7.

Nexaweb – This Burlington (Massachusetts, USA) based company specializes in modernization technology that 'enhances, extends and transforms legacy applications through an open web development platform and reference architecture' but to anyone in the enterprise mashups space, the parallels between the technology platforms are obvious. Nexaweb has found a convincing story to sell its Web 2.0 architecture to IT departments in a way that

Positives

Rich internet application development environment

Negatives

Underperforms on collaborative features and data mashups

IT people understand its purpose. Not a platform for situational applications yet but no doubt it's on Nexaweb's roadmap.

Positives

Strong applications life-cycle capability
Good user tools and orchestration module
Maturing user community

Negatives

Weak data mashups performance

Positives

Powerful portfolio of data mashup features

Negatives

Design environment is based on Eclipse (third party environment)
Lacks depth in orchestration and applications life-cycle management

Positives

World's fastest growing enterprise portal server platform
Strong portfolio of data integration / harmonization features

Negatives

Poor data mashups features
Weak user tools for accessing and sharing mashups

Positives

Thoughtfully designed and very complete architecture
Strong workflow engine

Negatives

Comparatively weak data mashups capabilities
Weak on social networking and collaboration features

6.

Serena – Serena is the first major player to create a marketplace for mashups and their software applications dovetail nicely into the Microsoft desktop world so users find their UI familiar. Serena has profited from its experience in Applications Life-Cycle Management and has the most advanced version control and mashup management features in its class. Another strength of Serena's platform is its orchestration module for integration with legacy systems (similar to Encanvas's Information Flow Designer). However, Serena has yet to provide a full platform to include social networking and collaborative features so they've still got some way to go. The absence of an on premises offering is also a major weakness for large corporations.

5.

JackBe – The Enterprise Mashup platform making the most noise, JackBe has recently received even more coffers for its developments through another round of funding. JackBe sees portals and mashups becoming the 'ecosystem' for business users - and the browser as the business container of choice. Similar to Encanvas, JackBe's mashup platform, Presto, can leverage internal and external data while meeting tough enterprise security and governance requirements. The vision of the management team seems to be sound but the company has got some way to go to prove its marketing messages with real-world case examples and the software platform currently appears to lack depth in areas of legacy integration tools, life-cycle management and orchestration.

4.

Microsoft SharePoint – Other than its light-weight consumer mashup product Popfly, Microsoft doesn't really have an enterprise mashup 'product' as such but it does a pretty good job of gluing its enterprise computing platform tools together to create an enterprise mashup environment. SharePoint Designer 2007 is intended to be more of an end user tool but not for any users without a computing degree!

3.

Interneer – Interneer (CA, USA) would not describe themselves as an enterprise mashups player at all but their technology is relevant and well designed. Inteneer's Intellect platform is positioned as a human-centric workflow platform that (according to their website) "allows average business people to configure web-based applications with integrated workflow at the speed of business, without programming." Interneer has developed an extremely intuitive and easy to use point and click design environment for non-IT people and has managed to combine this UI with an equally impressive applications integration and orchestration module. What Interneer lacks at the moment is the collaborative workspace and automated portal deployment

architecture. It also remains to be seen whether Interneer has the vision and marketing muscle to remain at number 3 in this chart for 2010.

2.

Positives

Rich Web 2.0 user interfaces
Strongest data mashups capabilities
See-No-Code integrated design environment with 2-step publishing to cloud computing platforms
Rich portfolio of ready-to-use Middle-Apps™
Good application lifecycle management story
Compelling track record of enterprise deployments

Negatives

No workflow or logic engine
Weak on mashup community sharing tools and features

Encanvas - Encanvas was the first player to introduce an Enterprise scale mashup portal product offering back in 2004 with major deployments with organizations including Canon, Ernst and Young and Transport for London. While its version 1.7 product didn't make the number 1 spot the company will tell you that its investment in the last 3 years has gone into its second generation Secure&Live™ platform that launches in 2010. Encanvas continues to be the easiest to use situational applications publishing platform, the most secure and arguably the most dexterous. Its ability to create databases, virtual marts and harvest legacy sources through multi-linking between fields of data from disparate web services, legacy and desktop data sources makes its data mashup possibilities more versatile than any of the other products in this category - although OpenSpan's desktop integration technologies gives Encanvas a very close run for its money. Encanvas also has built in collaborative tools like Webshow360 and Squork web messaging that turn enterprise mashup applications into virtual collaborative workspaces. Encanvas's use of its own embedded Middle-App technologies (including Vector-Map-Format™ mapping, S-Tag™ content management and DynamicZoom™ visualization, together with its ability to deliver massively scaling portal architectures supported by an inclusive security model makes Encanvas a strong runner up.

1.

Positives

Mature offering
Easy to use mashup community sharing tools
Strong security argument that levers IBM's credentials in data processing

Negatives

Expensive
Ugly UI and lacklustre adoption of Web 2.0 technologies
Slow to adopt social operating systems concepts

IBM Mashup Center – The originators of the situational applications concept, IBM continues to innovate in the area of agile software. The company has taken the subject of enterprise mashups much more seriously than its major rivals and has recently invested over \$100 million in mashup, collaboration and social computing technologies. This investment is now beginning to show through the new line-up of technologies coming out of the IBM stable.

IBM Mashup Center is the first meaningful platform that unites a user interface that non-IT people can understand with data mashup technologies and web harvesting and discovery. The portal based solution also integrates with Avaya's Application Enablement (AE) Services API which is probably the first mashup cross-over into the unified communications space. IBM appears to understand collaboration better than Microsoft, yet its strategy is enterprise platform based and so it may suffer as the industry moves towards self-forming situational people networks who will want the ability to pay for their IT platforms on a utility basis. A challenge for the IBM team is how to counter the factor of 100 price difference to Encanvas when the functionality is getting so similar.

Other key players that are likely to influence the Enterprise Mashups space are Coghead and Dreamface; products that have excellent design interfaces but have yet to deliver the full gamut of enterprise mashup platform capabilities, Endeca, StrikeIron and OpenSpan who play in the Information Access Platform space and have particularly powerful enterprise legacy systems connectors with scope to develop enterprise mashup capabilities in the future, Kapow technologies who currently lead the way in mashup harvesting tools, composite applications vendors like Cordys that focus more on enterprise business process management but whose technology implementation is similar in terms of usability and dexterity to enterprise mashup platforms, and finally rapid applications authoring providers like LiquidApps from Harmonia Inc and IronSpeed who are introducing development environments that have the potential to respond to a number of the use cases that enterprise mashups address.

It will be interesting to see who the winners and losers will be in 2010 which promises to be a year of step change innovations in all areas of technology – cloud computing, unified communications, virtualization, mashups, location-awareness...

About NDMC

NDMC helps organizations to engineer growth innovation by better understanding their customer value and exploiting this insight to improve the effectiveness of their organization.

Clients appoint NDMC to understand customer value and the markets they serve – to use this knowledge to increase sales revenues by improving the quality and fit of their offerings, improving marketing communications, developing effective learning and development programmes and aligning organizational resources to be as useful and productive as they can be. We deliver market insight - clarity, which helps business leaders to drive growth that outstrips market expectations. We consistently deliver 6 to 9 months' notice of key market changes to strategic planners. For marketers, NDMC bring a clearer understanding of technology markets, brand reach and customer priorities that can directly influence new proposition and product development.

Results driven methods, proven to work:

NDMC has developed a unique portfolio of customer value analysis, organizational alignment and engineering methods as part of its commitment to helping large complex organizations to achieve profitable growth by always delivering what customers want.

Advantages of working with NDMC:

- Domain expertise in IT sectors and complex business management
- Western European coverage with natural language analysts and field workers
- Proven track record of project value and success
- Transparency of methods

Our commitment is always to be:

- A customer advocate
- Attentive to your business needs and expectations
- Accountable and measurable for project success
- A facilitator of learning, knowledge transfer and cooperation
- An energetic, results-driven contributor to your success

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