

Magic Quadrant pour la plate-forme d'intégration en tant que service

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Par **et 3 de plus** Keith Guttridge, Andrew Comes,

La demande d'intégration n'a jamais été aussi élevée, et la plate-forme d'intégration en tant que service est le plus grand marché de plate-forme d'intégration répondant à cette demande. Les responsables de l'ingénierie logicielle devraient appliquer cette recherche pour sélectionner les fournisseurs d'iPaaS qui répondent à leurs besoins.

Définition/description du marché

Gartner définit la plateforme d'intégration en tant que service (iPaaS) comme un service cloud géré par un fournisseur qui permet aux utilisateurs finaux de mettre en œuvre des intégrations entre une variété d'applications, de services et de sources de données, à la fois internes et externes à leur organisation.

iPaaS permet aux utilisateurs finaux de la plateforme d'intégrer une variété d'applications, de services et de sources de données internes et externes pour au moins l'une des trois principales utilisations de la technologie d'intégration :

- **Cohérence des données** : capacité de surveiller ou d'être averti par les applications, les services et les sources de données des changements, et de propager ces modifications aux applications et aux destinations de données appropriées (par exemple, « synchroniser les données client » ou « ingérer dans le lac de données »).
- **Processus en plusieurs étapes** : capacité à mettre en œuvre des processus en plusieurs étapes entre les applications, les services et les sources de données (par exemple, pour « intégrer l'employé » ou « traiter les réclamations d'assurance »).
- **Service composite** : possibilité de créer des services composites exposés sous forme d'API ou d'événements et composés à partir d'applications, de services et de sources de données existants (par exemple, pour créer un service de « vérification de crédit » ou pour créer un service de « génération de score de fraude »).

Ces processus d'intégration, pipelines de données, workflows, automatisations et services composites sont le plus souvent créés via des environnements de développement intuitifs low-

code ou no-code, bien que certains fournisseurs fournissent des outils de développement plus complexes.

Les fonctionnalités indispensables pour ce marché sont les suivantes :

- Plan de contrôle fourni au client en tant que service cloud.
- La possibilité d'être entièrement géré par le fournisseur pour tous les correctifs et mises à jour logiciels.
- Des outils pour permettre aux utilisateurs finaux de mettre en œuvre une technologie d'intégration pour des cas d'utilisation impliquant la cohérence des données, des processus en plusieurs étapes ou des services composites.

Les fonctionnalités standard pour ce marché sont les suivantes :

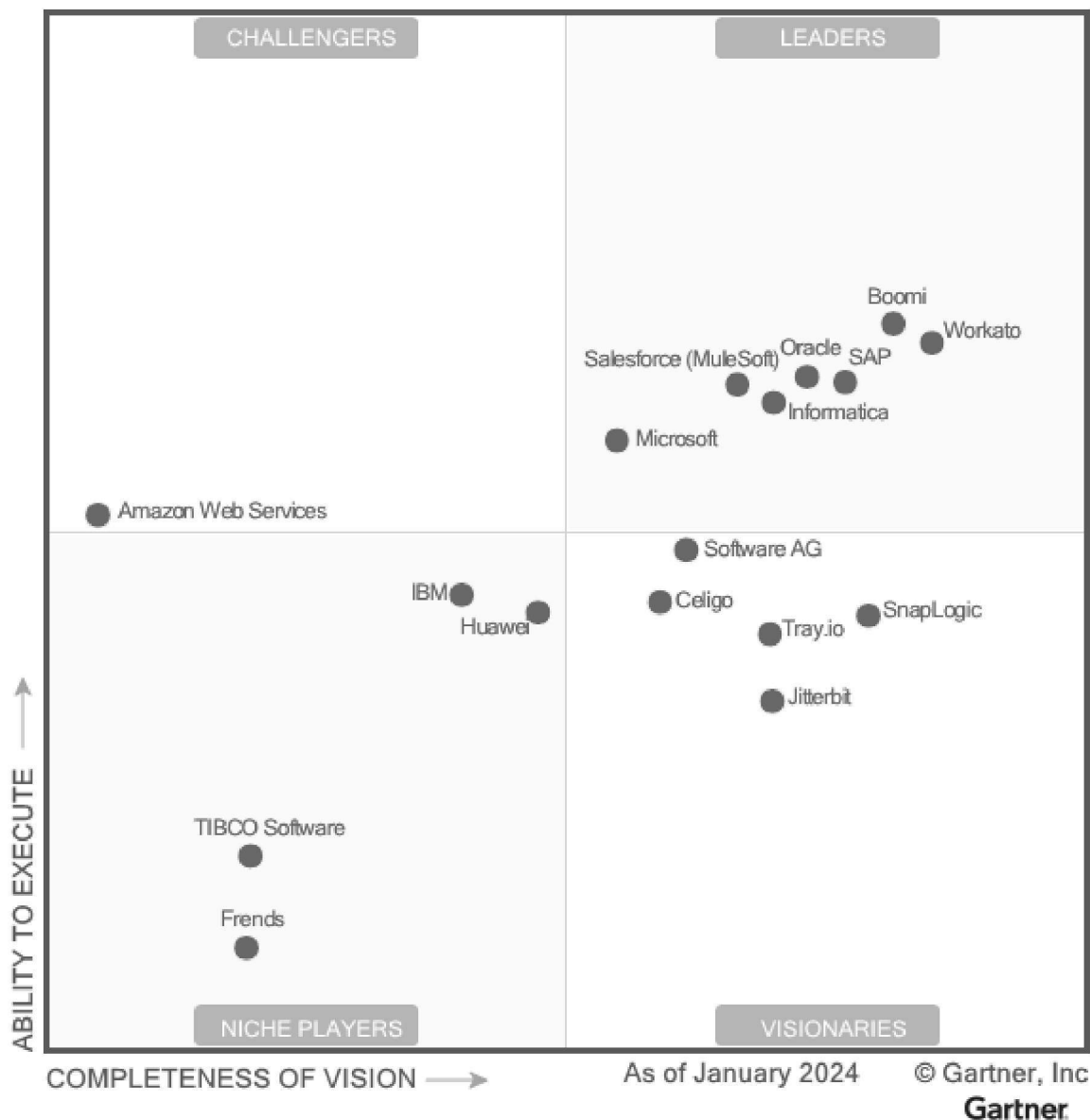
- Outils de cycle de vie du développement logiciel (SDLC) pour permettre la gestion du SDLC, y compris la gestion des versions, les tests et le déploiement.
- Des outils opérationnels pour permettre la surveillance opérationnelle, les alertes, le reporting et l'audit des intégrations, des processus, des pipelines et des services dans les environnements de production.
- Plan d'exécution fourni au client en tant que service cloud.

Les fonctionnalités optionnelles pour ce marché sont les suivantes :

- Processus d'intégration packagés (PIP) pour accélérer la livraison de l'intégration
- Augmentation de l'IA pour aider à créer des intégrations et à exploiter la plateforme
- Augmentation de l'IA pour aider à exploiter la plateforme
- Connectivité sécurisée aux applications, aux services et aux sources de données en dehors du cloud fourni par le fournisseur
- Intégration via les interfaces utilisateur de l'application (via le grattage d'écran, l'émulation de terminal ou le navigateur web)
- Fonctions de traitement intelligent des documents (IDP) pour le traitement des documents numérisés et des pièces jointes
- Exploration de tâches ou de processus
- Découverte de services
- Découverte de données

Quadrant magique

Figure 1 : Magic Quadrant pour la plate-forme d'intégration en tant que service



Points forts et mises en garde des fournisseurs

Amazon Web Services

Amazon Web Services (AWS) est un challenger dans ce Magic Quadrant. AWS traite les cas d'utilisation de l'iPaaS par le biais d'un groupe de services auxquels il est possible de souscrire individuellement. Il s'agit notamment d'Amazon EventBridge, d'Amazon API Gateway, d'AWS Step Functions, d'Amazon AppFlow, d'AWS AppFabric, d'AWS Glue, d'Amazon Kinesis, d'AWS Transfer Family, d'AWS Database Migration Service, d'Amazon Simple Notification Service, d'Amazon Simple Queue Service et d'AWS Lambda.

AWS est basé à Seattle, et ses clients et ses opérations sont répartis géographiquement et dans divers secteurs. AWS permet aux développeurs de répondre à leurs besoins d'intégration dans le contexte du développement d'applications grâce à son offre d'intégration sans serveur, réduisant ainsi le coût total de possession.

Forces

- **Exécution des ventes et tarification** : AWS fournit des prix publics pour ses différents services d'intégration, ainsi que des exemples de tarification et des calculatrices. Cela offre une transparence des prix pour les clients qui évaluent l'offre AWS et les aide à déterminer le coût total de possession.
- **Opérations** : AWS offre une haute disponibilité pour ses services d'intégration dans toutes les principales zones géographiques. Il offre également une expérience transparente de mise à jour et de correction à sa clientèle.
- **Présence géographique** : AWS dispose d'une présence commerciale et d'assistance directe, ainsi que d'un éventail de centres de données pour l'hébergement de ses services d'intégration, dans toutes les principales régions : Amérique du Nord, Asie/Pacifique, Amérique latine et Europe, Moyen-Orient et Afrique (EMEA). De plus, les clients d'AWS peuvent bénéficier de son vaste réseau mondial de partenaires.

Précautions

- **Produit ou service** : AWS ne propose pas d'offre de plateforme unifiée comme la plupart des fournisseurs de ce Magic Quadrant. Il a une prise en charge limitée des cas d'utilisation EDI/B2B et est également à la traîne par rapport à ses concurrents en offrant un large éventail de connecteurs et en ajoutant des capacités d'intégration augmentée.
- **Compréhension du marché** : les offres iPaaS d'AWS s'adressent principalement aux développeurs qui effectuent l'intégration dans le cadre de leurs initiatives de développement d'applications au sein de l'écosystème AWS. AWS manque d'esprit dans cet espace parmi les technologues d'entreprise et les spécialistes de l'intégration pour leurs besoins d'intégration.
- **Stratégie verticale/sectorielle** : AWS ne propose pas la même gamme d'offres sectorielles et de solutions spécifiques à la verticale ou de PIP que certains de ses concurrents. Les prospects qui se concentrent sur l'exploitation de PIP prêts à l'emploi doivent vérifier si AWS peut répondre à leurs besoins.

Boomi

Boomi est un leader dans ce Magic Quadrant. Il propose la plate-forme Boomi, qui comprend l'intégration Boomi, la gestion des API Boomi, Boomi AI, la gestion B2B/EDI Boomi, le catalogue et la préparation des données Boomi, les flux d'événements Boomi, le hub de données principales Boomi et Boomi Flow.

Basée à Chesterbrook, en Pennsylvanie, Boomi opère principalement en Amérique du Nord, avec une forte présence en Europe et une certaine présence en Asie/Pacifique. Après quelques années de changements relativement faibles, Boomi a réussi à fournir des mises à jour substantielles au cours de l'année 2023, telles que son nouveau service de streaming d'événements et plusieurs nouveaux services basés sur l'IA.

Forces

- **Stratégie d'offre (produit)** : Boomi continue d'investir dans l'augmentation de l'IA de la plateforme afin d'améliorer la productivité, son SLA de 99,99 %, les temps de reprise après

sinistre, les options de sécurité et d'autres services, et de simplifier l'utilisation.

- **Réactivité/record du marché** : Boomi a ajusté son modèle de livraison pour accélérer la mise en place de plusieurs nouvelles fonctionnalités, telles que Boomi Labs pour favoriser la collaboration, Boomi Event Streams et Boomi Integration Quick Start.
- **Expérience client** : Boomi propose un programme de réussite client ainsi qu'un programme de formation qui a permis à plus de 30 000 personnes d'être certifiées sur divers services Boomi. Les clients de Boomi ont attribué une note élevée à Boomi en tant que fournisseur et pour ses produits sur Gartner Peer Insights.

Précautions

- **Stratégie géographique** : Bien que Boomi ait une présence commerciale directe dans la plupart des régions, ses centres de données sont répartis entre ses services : Boomi Platform est géré depuis les États-Unis, tandis que Boomi Flow ajoute des plans de contrôle européens et Asie/Pacifique pour ses services. Les prospects potentiels doivent vérifier auprès de Boomi pour comprendre quelle combinaison de plates-formes sera nécessaire pour leurs cas d'utilisation.
- **Exécution des ventes/tarifification** : Boomi reste dans le top cinq des fournisseurs d'iPaaS sur la base des estimations de Gartner en termes de chiffre d'affaires et de nombre de clients. Pourtant, malgré une croissance à deux chiffres dans les deux indicateurs, Boomi n'a pas suivi le rythme de la moyenne du marché pour ce cycle du Magic Quadrant.
- **Produit ou service** : Boomi dispose de fonctionnalités de base de transfert de fichiers géré (MFT) et de traitement intelligent des documents (IDP). Cependant, il utilise un modèle de partenariat pour des MFT plus avancés, l'IDP et l'automatisation robotisée des processus (RPA). Les clients qui souhaitent une approche à fournisseur unique pour ces fonctionnalités devront vérifier si Boomi dispose d'une profondeur suffisante pour prendre en charge leurs cas d'utilisation.

Celigo

Celigo is a Visionary in this Magic Quadrant. It offers Celigo integrator.io, which enables IT and business users to implement integration and automation. Celigo provides prepackaged integrations and connectors, such as Celigo Integration Apps and Quickstart Templates, and an Integration App Framework to build and monetize custom integration apps.

Based in Redwood City, California, Celigo's operations are primarily in North America with continued expansion in EMEA and Asia/Pacific. Its clients tend to be in the retail, technology, manufacturing and services industries. Celigo has expanded the breadth of its capabilities in the last year while maintaining ease of use, and has built out its partner network to improve its offering globally.

Strengths

- **Market responsiveness**: Celigo has improved its release cycle and adjusted the platform based on customer feedback. This has included overhauling its approach to EDI, API management and

PIPs, the addition of GenAI and an improved offering for data integration.

- **Customer experience:** Celigo has one of the highest customer experience ratings on Gartner Peer Insights out of the evaluated vendors, reflecting its focus on accommodating its target integrator persona. Reviews often mention ease of use, speed of building integrations and responsive support.
- **Sales strategy:** Celigo's selling point is centered around empowering line-of-business and business technologists to collaborate with enterprise IT through a fusion team approach. Clients like the messaging around connecting business processes, instead of technical language around IT and integration. Celigo plays to these strengths selling directly to business units with PIPs.

Cautions

- **Geographic strategy:** Celigo is expanding its global presence; however, compared with its competitors, it has a smaller presence outside of North America. Gartner estimates that two-thirds of Celigo clients are in North America, with the rest distributed across EMEA, Asia/Pacific and Latin America. Organizations outside of North America considering Celigo should confirm that they will have access to local expertise and support.
- **Product or service:** Celigo's focus has been on ease of use and speed of delivery for application integration use cases. Celigo isn't widely adopted for heavy data integration or EDI use cases, but it plans to address these use cases in its product roadmap.
- **Marketing execution:** Even though Celigo scored high for customer experience, Celigo's brand awareness lags behind some of its competitors. This gap between customer and market perception of the product reflects Celigo's challenges in delivering its messaging and executing in the market.

Friends

Friends is a Niche Player in this Magic Quadrant. It offers Friends iPaaS, which focuses on enabling integration, API development and management, and business process automation in a low-code tool. Friends iPaaS is built and hosted on Microsoft Azure and utilizes open standards such as OpenAPI Specification and BPMN. Clients can customize and extend processing via code in C#.

Based in Espoo, Finland, Friends' operations are primarily in EMEA, with some presence in the U.S. and a growing presence in Asia/Pacific and the Middle East. Its customer base is primarily in energy and utilities, manufacturing, retail, IT/software services and the public sector.

Strengths

- **Customer experience:** Friends received good ratings for satisfaction and ease of product use on Gartner Peer Insights. Friends actively solicits customer feedback to improve its product. Customers can see roadmap and development progress in a public forum and can request and vote for new features to be prioritized.
- **Market responsiveness:** Friends' community engagement helps it align its product strategy with changing customer demands. The vendor is also quick to respond to new opportunities,

enabling it to benefit from Microsoft BizTalk migration and app modernization initiatives.

- **Sales execution/pricing:** Frends has publicly available pricing and offers tools to estimate costs. It offers different editions to support different market segments and can provide tailored pricing based on specific requirements.

Cautions

- **Deployment models:** Frends can run on OpenStack, so is supported in other clouds and on-premises. However, it is predominantly deployed on Microsoft Azure and offers limited deployment options compared with other vendors in this Magic Quadrant. Frends has plans to support more deployment options, including embedded integration capabilities, to enable independent software vendor (ISV) partners to include Frends within their own solutions.
- **Product strategy:** In the last year, Frends has extended its capabilities to support additional integration use cases. However, it does not have the breadth of integration capabilities seen in other vendor offerings and its AI-augmented development features, while growing, are less well-established than those of other vendors.
- **Marketing strategy:** Frends has expanded its marketing to include business technologists, but it predominantly focuses on lease of use and time to deploy for integration specialists and software engineers. This focus on the IT user may discourage business technologist adoption. Frends predominantly targets users in Western and Northern Europe and has a limited presence outside of these regions.

Huawei

Huawei is a Niche Player in this Magic Quadrant. It offers a range of iPaaS services under the ROMA brand: ROMA Connect, ROMA EventGrid, ROMA API Gateway and API life cycle management, ROMA Exchange, and ROMA Application Business Model. ROMA customers can make use of other Huawei cloud services for hyperautomation-focused and application-composition-focused use cases.

Based in Shenzhen, China, Huawei's operations are mainly focused in Asia/Pacific, with some presence in EMEA and Canada. It has customers of all sizes, primarily in the government, education, manufacturing, smart cities and energy sectors. Huawei is expanding its data center coverage in EMEA and Latin America, as well as increasing its partner network.

Strengths

- **Product or service:** With the addition of several capabilities, Huawei ROMA now supports one of the broadest sets of integration services available in the market.
- **Customer experience:** Huawei provides comprehensive customer success support, including a training program that has enabled over 6,500 developers to be trained on the ROMA platform.
- **Innovation:** Huawei's core innovative features include AI-driven data cleansing, coordination and data transformation prediction capabilities. Its innovation roadmap comprises a long list of items, such as serverless architectures, unified runtimes, multiparty trusted sharing, embedded site deployment and integration capabilities for blockchains.

Cautions

- **Operations:** Gartner estimates that over three-quarters of Huawei's processing volume occurs in the Chinese mainland, with the rest distributed across Latin America, the Middle East and Africa. These data centers provide class-leading SLAs. Organizations outside of the region should press Huawei for assurances on more localized operations or similar SLAs for locally deployed edge instances.
- **Geographic strategy:** While efforts have been made to broaden Huawei's appeal outside of China, with good growth reported in the Middle East, Africa and Latin America, its customer base is mostly Chinese companies expanding globally rather than companies local to other regions.
- **Vertical/industry strategy:** Huawei's strategy for lines of business, cloud platforms and vendor ecosystems is not as comprehensive as that of other vendors in this Magic Quadrant.

IBM

IBM is a Niche Player in this Magic Quadrant. IBM offers a broad range of integration capabilities spread over a wide set of products and differing cloud environments. These include IBM App Connect Enterprise as a Service, IBM API Connect Enterprise as a Service, IBM MQ, IBM Sterling B2B Integration SaaS, IBM Cloud Pak for Data as a Service, and IBM Cloud Pak for Business Automation as a Service.

Based in Armonk, New York, IBM's operations are geographically diversified and it has customers across all industries. In 2023, IBM continued its AI journey and invested in unifying the UX and deployment models, working toward a more harmonized iPaaS offering.

On 18 December 2023, IBM announced its intent to acquire StreamSets and webMethods from Software AG.

Strengths

- **Product or service:** IBM continues to offer one of the most comprehensive sets of integration capabilities to address complex enterprise-grade use cases. IBM performed highest for its breadth of functional capabilities, its features for integrator productivity and platform versatility, though these ratings were split across several independent IBM services.
- **Viability:** IBM's large revenue stream, stable growth numbers that match similarly sized vendors, and performance provide confidence to customers looking for a reliable organization with a proven track record.
- **Geographic strategy:** IBM is a global company with sales and support teams worldwide. Its strategy involves leveraging its large partner network to provide locality to its global services. This includes expansion of control and data planes on Microsoft Azure and AWS to cover more regions, solving concerns of data residency for certain customers.

Cautions

- **Market understanding:** IBM's demonstrated understanding of PaaS versus SaaS versus managed services has been inconsistent across its portfolio. This has resulted in confusing and often conflicting messaging across its range of iPaaS services.
- **Innovation:** IBM has focused its development efforts on operational improvements; for example, enabling support for App Connect and API Connect as vendor-managed services on AWS. As a result, IBM has shown less innovation than other vendors in this Magic Quadrant for features and functions that improve adoption and collaboration across its iPaaS services to provide a more integrated user experience.
- **Customer experience:** Based on Gartner's Peer Insights reviews, IBM's various iPaaS services are rated lower than those of other evaluated vendors. IBM clients value the product capabilities, but note complexity, cost and support as dislikes. Reviews generally target a specific product and how it performs as part of a larger iPaaS, which masks concerns that arise from combining products into a larger iPaaS framework.

Informatica

Informatica is a Leader in this Magic Quadrant. It offers Cloud API and Application Integration, Cloud B2B Gateway, Cloud Integration Hub, API Manager, API Center, Cloud Data Integration and Cloud Mass Ingestion as services on its Intelligent Data Management Cloud (IDMC) platform.

Based in Redwood City, California, Informatica's operations are geographically diversified and it has customers across all industries. Informatica reengaged with the iPaaS market in 2023, setting up more targeted integration marketing, dedicated sales strategies and a renewed focus on PIPs to broaden the appeal of the platform.

Strengths

- **Vertical/industry strategy:** Informatica provides a broad range of vertical and industry solutions, including lines of business, application ecosystems and industry clouds, as well as a wide range of public cloud infrastructure.
- **Operations:** With a strong focus on platform security, regional availability, a wide range of deployment options, a four-hour recovery time objective (RTO)/recovery point objective (RPO) for disaster recovery scenarios, and a large partner network, operations was one of Informatica's highest-scoring criteria.
- **Product or service:** Informatica performed well for its breadth of functional capabilities, its features for integrator productivity, platform versatility and its focus on platform security.

Cautions

- **Innovation:** Informatica fell short of other Leaders in this Magic Quadrant for innovation in collaboration features. However, there are several features in its product roadmap that will look to address this in 2024.

- **Marketing strategy:** Informatica's successful messaging around its data management credentials has increased market perception that the vendor is best suited for complex, data-centric integration use cases at the expense of simpler use cases.
- **Customer experience:** Informatica's customer experience ratings on Gartner Peer Insights for its product and as a vendor lagged behind those of other Leaders in this Magic Quadrant. Informatica clients cite ease of use and platform complexity as areas of concern.

Jitterbit

Jitterbit is a Visionary in this Magic Quadrant. It offers Jitterbit Harmony, which provides capabilities for application, data and B2B/EDI integration, API creation and management, and low-code application development, and the newly introduced message queue service.

Jitterbit is based in Alameda, California, and the majority of its customers are midsize enterprise and enterprise organizations in the manufacturing, technology, healthcare, retail, media, education and nonprofit sectors. In addition to selling its iPaaS directly to customers, Jitterbit offers embedded integration solutions and capabilities for ISVs and SaaS providers.

Strengths

- **Offering (product) strategy:** Since last year's Magic Quadrant, Jitterbit has expanded its integration capabilities to address additional use cases. These include Harmony EDI, a cloud-based EDI application, and Jitterbit Message Queue Service, a cloud-based messaging service.
- **Vertical/industry strategy:** Jitterbit has extended its features for automating key integration use cases to accelerate development through PIPs, templates, recipes and application connectors. This will enhance its capabilities for industry-specific solutions for manufacturing, retail, healthcare, education and technology, and for application areas such as ERP, CRM and HCM.
- **Innovation:** Jitterbit received higher-than-average scores for its AI features, its focus on different integration personas, and expanded breadth of use cases.

Cautions

- **Marketing strategy:** Jitterbit has traditionally targeted IT users and still has limited visibility among business technologists compared with its competitors. As a result, prospective customers often overlook Jitterbit as an offering for business users.
- **Sales execution and pricing:** Jitterbit uses an endpoint-based pricing model for iPaaS. Public information about pricing is limited to describing the different tier levels, which makes it challenging for prospective customers to evaluate actual expected costs and compare pricing with competitors.
- **Operations:** Jitterbit has data centers in North America and Europe and plans to add one in South America, but it has a relatively small employee base and no data centers in the Middle East or Africa. Prospective customers should assess access to localized sales, training and support, as well as any data residency requirements.

Microsoft

Microsoft is a Leader in this Magic Quadrant. It offers Azure Integration Services, which includes Azure API Management, Azure Logic Apps, Azure Service Bus, Azure Event Grid, Azure Functions, Azure Data Factory and Power Automate.

Based in Redmond, Washington, Microsoft's operations are geographically distributed and it has customers across all industries. Microsoft rolls out features globally for all user personas and is pursuing a dual strategy of Azure platform for IT specialists and Power Platform for business technologists.

Strengths

- **Geographic strategy:** Microsoft has a strong presence globally and continues to focus on being present on a global stage. It has direct support presence in all regions, a broad partner support network and many options for runtime and control planes, with Azure Arc extending Azure beyond data centers.
- **Sales execution/pricing:** Microsoft has one flexible and transparent pricing model per service that allows organizations to start small and scale out at their own pace. Microsoft also provides freemium trial options that give prospective customers the confidence to build out Azure solutions based on need, rather than worrying about getting locked into expensive, long-term contracts.
- **Viability:** Prospective customers looking for assurances in this area will value as integration technologies continue to get investments from Microsoft's status as a large company with a healthy financial profile. Microsoft's integration strategy is fundamental to drive adoption of the Azure platform.

Cautions

- **Market understanding:** Microsoft has a dual strategy with Azure and Power Platform. Microsoft targets software engineers and integration specialists using Azure integration services to provide integration capabilities. Microsoft also targets citizen technologists via its Power Platform to implement simple processes and workflow automation. However, Microsoft does not provide a user experience for business technologists looking to solve complex integration use cases.
- **Sales strategy:** Microsoft's sales strategy is congruent with its market understanding, directly targeting IT and OEM/ISV buyers for Azure and business unit buyers for Power Platform. While Azure has a marketplace, it doesn't feature on other marketplaces and its stand-alone integration sales strategy is less visible than the strategies of other Leaders in this Magic Quadrant.
- **Vertical strategy:** Microsoft has a limited vertical iPaaS strategy, instead focusing on generic integration capabilities. Indeed, it has no plans for PIPs. While Microsoft does provide templates via the Azure Integration Services Landing Zone and has many case studies of

successfully implementing Azure Integration Services across a wide range of industries, it lacks targeted PIPs for specific industry, line-of-business and application ecosystem use cases.

Oracle

Oracle is a Leader in this Magic Quadrant. Its iPaaS offering comprises Oracle Integration (including Process, Insight, File Server, B2B, and Visual Builder), Oracle Cloud Infrastructure (OCI) API Gateway, OCI Queue, OCI GoldenGate, OCI Data Integration, Oracle SOA Suite on Marketplace, Oracle Internet of Things (IoT) Cloud Service, OCI Streaming, Oracle Digital Assistant, and OCI AI Services.

Based in Austin, Texas, Oracle's operations are geographically distributed, with most of its customers in the U.S. and EMEA. It has customers across all industries. Oracle continues to build on its hyperautomation vision by providing a suite of capabilities that combine application integration and end-to-end business process automation.

Strengths

- **Geographic strategy:** Oracle operates in more than 55 countries and has a global network of partners. Its iPaaS offering is deployed across 46 public cloud regions in 23 countries. Its global presence provides customers with widely available access to local Oracle expertise in most regions.
- **Market understanding:** As one of the Leaders in the iPaaS market, based on Gartner estimates of market share, Oracle continues to demonstrate a strong understanding of enterprise integration needs. With its focus on combining integration and automation, Oracle provides support for diverse use cases across multiple deployment models while supporting multipersona experiences and collaboration.
- **Operations:** Oracle's offering has high availability across the North America, EMEA, Asia/Pacific and Latin America regions. The platform provides strong disaster recovery capabilities, zero downtime upgrade and patching, and high-volume message throughput.

Cautions

- **Marketing strategy:** Oracle's offering is mostly attractive to customers using Oracle's business applications. Prospective customers not using an ecosystem of Oracle applications may overlook Oracle as a suitable candidate for their integration scenarios.
- **Market responsiveness:** Oracle has delivered only six major releases and six minor releases over the last 12 months. Oracle has added features for private endpoint connectivity, collaboration and AI in process automation, but is still playing catch-up in terms of augmented integration capabilities.
- **Product or service:** Oracle lags behind its competition for innovative features added for integrator productivity – like AI assistance for integration development.

Salesforce (MuleSoft)

Salesforce (MuleSoft) is a Leader in this Magic Quadrant. Its iPaaS offering is the MuleSoft Anypoint Platform, which comprises integration, automation and API management capabilities. MuleSoft Anypoint Platform includes Design Center (to create integrations and APIs); Exchange (to share integration assets); and Flex Gateway, API Manager, and API Governance (to manage integrations). It offers an automation bundle to create automation workflows and orchestrate business processes, and an industry bundle with prebuilt solutions for Salesforce Clouds.

Based in San Francisco, California, Salesforce (MuleSoft)'s operations are geographically diversified and it has customers across all industries. Salesforce (MuleSoft) seeks to differentiate its composite services messaging with messaging that emphasizes connecting and automating with low code and AI to increase developer productivity.

Strengths

- **Customer experience:** Per Gartner Peer Insights, Salesforce (MuleSoft) scores high in customer satisfaction and users recommend it frequently. Reviewers emphasize the maturity of the platform, breadth of application connectors and product support.
- **Operations:** MuleSoft Anypoint Platform provides high availability and disaster recovery and is supported by a globally distributed network of data centers, with a global implementation partner bench making professional services widely available.
- **Product/service:** MuleSoft Anypoint Platform offers a wide set of capabilities, with significant depth in the composite service integration pattern. Salesforce (MuleSoft)'s prescribed mediated services architecture, in concert with the large connector exchange, brings customers the benefits of standardization of competency and architecture around a powerful platform.

Cautions

- **Sales execution/pricing:** Recent consumption-based pricing is being rolled-out for customers in North and South America as the default pricing model. For many existing customers and all remaining geographies, the vCore is the predominant pricing lever, which presents a challenge for prospective customers that often cannot easily estimate their vCore usage.
- **Market responsiveness/record:** Salesforce (MuleSoft) markets its Anypoint Platform with a prescription for a layered, composite services integration architecture for strategic transformation. However, this is often too heavy for simple use cases. While Salesforce (MuleSoft) has responded with the release of its automation bundle, aimed at business technologists, it is late to the market and its iPaaS offering lacks visibility compared with other Leaders' offerings.
- **Offering (product) strategy:** MuleSoft Anypoint Platform primarily appeals to integration specialists and software engineers. Salesforce (MuleSoft) has several other services targeting iPaaS use cases for business technologists, but the strategy is spread across Salesforce branded offerings and MuleSoft branded offerings, leading to customer confusion with regards to product naming.

SAP

SAP is a Leader in this Magic Quadrant. It offers the SAP Integration Suite — a key technology of the SAP Business Technology Platform (BTP).

SAP Integration Suite provides a full range of application, data, process, AI and business integration capabilities, predominantly oriented around the SAP application ecosystem with the ability to integrate with non-SAP applications. SAP Business Accelerator Hub, a component of the Integration Suite, provides customers with access to prebuilt integrated solutions aligned to key business processes.

SAP is based in Walldorf, Germany, and boasts geographically diverse operations and customers across multiple industries. SAP plans to further develop industry-aligned, prebuilt solutions and has improved the product's capabilities for customers' hybrid environments and deployment requirements with the launch of Edge Integration Cell.

Strengths

- **Customer experience:** Customers highly recommend SAP Integration Suite to their peers and score the product highly for customer satisfaction. Many positive reviews on Gartner's Peer Insights platform emphasize the monitoring features and design experience.
- **Geographic strategy:** SAP maintains a significant and geographically distributed commercial and support presence, data centers and partnerships with systems integrators (SIs). SAP operates data centers across all geographic regions and can run on AWS, Microsoft Azure, Google Cloud Platform and Alibaba Cloud, as well as in client data centers and data centers for regulated industries.
- **Product or service:** Through SAP Business Accelerator Hub, customers can leverage PIPs to accelerate the delivery of business outcomes, such as lead to cash, recruit to hire and source to pay. The platform also provides the ability to build new solutions upon reusable components, endpoints and events sourced from across the SAP and non-SAP application portfolios.

Cautions

- **Marketing execution:** While there is a positive perception of SAP Integration Suite, it is still viewed in the market as an SAP-centric offering rather than a general-purpose integration platform.
- **Business model:** SAP's business model for Integration Suite and the larger BTP is focused on being sold predominantly alongside SAP applications and modernization initiatives.
- **Sales execution/pricing:** BTP's pricing is transparent and publicly available, but SAP does not tailor pricing to market segments and organization sizes — a practice that has become increasingly common in this market to increase appeal to the public sector, as well as nonprofit and education sectors. In addition, some clients are cautious of the low introductory pricing that SAP offers for BTP.

SnapLogic

SnapLogic is a Visionary in this Magic Quadrant. It offers the Intelligent Integration Platform (IIP), which provides application integration, data integration and API management as a unified platform and different user experiences to cater for integration specialists, line-of-business users and citizen integrators.

Based in San Mateo, California, SnapLogic's operations are mainly in the U.S., the U.K. and Australia. The vendor is growing its local support and deployment options in other regions. It has broad industry coverage, with customers in the technology, retail, manufacturing, healthcare, financial services and transportation sectors.

Strengths

- **Innovation:** SnapLogic has delivered innovative features to accelerate and simplify integration development. It has extended its capabilities with SnapGPT, a natural-language tool to assist and accelerate integration development; AutoIDP, which uses AI to digitize and extract data and insights from business documents and is now part of SnapLogic's GenAI Builder; and enhanced API management features.
- **Sales strategy:** SnapLogic provides transparent pricing and tools to estimate costs. It has also extended the marketplaces where IIP is available beyond AWS to include Microsoft Azure and Google. SnapLogic uses global, vertical and local partnerships to support more successful implementations, and enables OEMs or ISVs to white label and embed the iPaaS in their own offerings.
- **Market understanding:** SnapLogic has differentiated capabilities and messaging for line-of-business and central IT buyers, as well as features for collaboration between different types of users. It has focused on boosting productivity by providing connectors and templates for common applications and data sources, as well as PIPs for the most common processes across multiple industries.

Cautions

- **Product or service:** SnapLogic does not provide as comprehensive capabilities for MFT or event broker services as other vendors in this Magic Quadrant. Instead, it focuses on connectors to third parties to provide these features. This may not suit organizations looking for a single vendor to provide these features.
- **Operations:** SnapLogic provides cloud-hosted data planes in North America, EMEA and Asia/Pacific. However, North America accounts for about two-thirds of SnapLogic's client base and SnapLogic has a smaller employee base outside of North America than other vendors in this Magic Quadrant. Prospective customers outside of North America should confirm as part of the evaluation process that they have access to local expertise and support, and that the vendor can meet their data residency requirements.
- **Customer experience:** On Gartner Peer Insights, customers rate SnapLogic in the middle of vendors in this Magic Quadrant. Customers have cited testing and debugging as areas for

improvement, which SnapLogic looks to address with its generative AI investment.

Software AG

Software AG is a Visionary in this Magic Quadrant. For its suite of iPaaS services, it offers webMethods.io Integration, webMethods.io API, webMethods.io B2B, webMethods.io MFT, webMethods.io Embed, and StreamSets.

Based in Darmstadt, Germany, Software AG's operations are geographically diversified and it has customers in all industries. In October 2023, Software AG announced its new messaging around the "Super iPaaS" theme as the vehicle for its iPaaS services.

On 18 December 2023, IBM announced its intent to acquire StreamSets and webMethods from Software AG.

Strengths

- **Product or service:** Software AG is rated highly for functional capabilities, integrator productivity, platform versatility and platform security.
- **Market responsiveness:** With changes to its development processes, Software AG now has a platform that is updated frequently and able to evolve rapidly. This is reflected in the number of updates and features added to the platform in this Magic Quadrant cycle, based on market demands.
- **Innovation:** Software AG has reimaged its iPaaS offering, putting AI at the center of the platform and focusing on ease of use and collaboration. As a result of this new focus on the iPaaS market, Software AG is closing the gap on the competition.

Cautions

- **Customer experience:** Software AG's customer experience was rated toward the lower end of the vendors in this year's Magic Quadrant. On Gartner Peer Insights, customers cite support issues, monitoring and user experience as areas for improvement.
- **Marketing strategy:** While Software AG attempts to differentiate from the competition with its Super iPaaS messaging, it has failed to acknowledge how the iPaaS market has evolved to include many of the features that Software AG states are lacking. Features such as AI-augmented integration, real-time event processing and "build once, run anywhere" have been part of most leading iPaaS offerings for a number of years.
- **Sales execution/pricing:** As an established integration vendor, Software AG has been getting iPaaS market share from a combination of migrating existing Software AG integration software customers to iPaaS, and onboarding new customers for complex integration use cases. While this approach works well for large accounts, it results in Software AG being rarely shortlisted for prospects with simpler use cases.

TIBCO Software is a Niche Player in this Magic Quadrant. It offers TIBCO Cloud Integration for integrating applications, data, APIs, B2B and IoT, and for automating processes.

Based in Santa Clara, California, TIBCO's operations are geographically diversified, with enterprise-level and midsize customers from all major industries, including manufacturing, consulting and financial services, healthcare, technology, government and retail. Throughout the past year, TIBCO has continued its focus on customers' cloud migrations and providing a unified platform for application and data integration, data management, analytics and business intelligence.

TIBCO Software did not respond to requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Geographic strategy:** TIBCO has been active in IT markets for decades. Given its lineage, strengths in global partnerships, runtimes and data center coverage, as well as direct and commercial support presence globally, TIBCO products are implemented around the world with customers from all industry backgrounds.
- **Operations:** TIBCO's Partner Program is geographically distributed, and the availability of professional services enables the vendor to support the needs of midsize customers locally at global scale.
- **Product or service:** TIBCO Cloud Integration provides a breadth of integration capabilities, with synergies between other TIBCO products from across technology categories. The capabilities provided are at the quality level sought out by enterprise customers.

Cautions

- **Marketing strategy:** TIBCO's strategy is to unify its business intelligence, data integration, analytics, iPaaS, master data management (MDM), and data management portfolio into a single hybrid multicloud platform. This will reduce TIBCO's appeal for smaller clients with simpler needs and favor larger clients with more complex operational requirements.
- **Innovation:** TIBCO has redirected its resources with its shift toward a single hybrid multicloud platform approach. It is unclear how much innovation to expect for the Cloud Integration product in the next 12 months beyond key customer-driven enhancements. As a result, innovation was one of TIBCO's lowest-scoring criteria.
- **Market responsiveness/record:** Compared with other vendors, TIBCO publishes fewer releases annually of new features and improvements for its iPaaS customers.

Tray.io

Tray.io is a Visionary in this Magic Quadrant. Its iPaaS offering is Tray Universal Automation Cloud – a unified platform comprising Tray Build, Tray Code and Tray Chat, geared toward different user experiences. Tray.io's iPaaS provides a wide range of prepackaged integrations and connectors, and supports the ability to build custom integrations.

Based in San Francisco, California, Tray.io's operations are focused mainly in North America, with some presence in Europe and Asia/Pacific. Tray.io has customers in all industries, with technology being the largest segment. Tray.io plans to build a composable platform enabling multiuser experiences powered by its Merlin AI capability.

Strengths

- **Sales strategy:** With its prepackaged integration templates and ease of use, Tray.io is successful in attracting customers that wish to automate business applications and processes. Tray.io's free trial offering is effective in converting users to paying customers. Its go-to-market approach targets ISVs and business users in midsize and large enterprises, and is increasingly focusing on targeting integration specialists and developers by providing multiuser experiences.
- **Market responsiveness:** Tray.io operates on a continuous delivery model and has released more than 1,600 updates to its platforms in the last 12 months. These include combining its embedded and platform capabilities into a single product, new functionality, connectors and connector endpoints. Tray.io proactively solicits feedback from its customers via multiple channels to improve and expand its product features.
- **Innovation:** Tray.io is focused on building a composable platform with its augmented integration capability at its heart, called Merlin AI. This will enable multipersona user experiences by providing NLP-based integration development and an AI-powered digital assistant. Tray.io's vision aligns with customer demand for augmented intelligence, automation and ease of use.

Cautions

- **Geographic strategy:** Tray.io is continuing to expand its geographic presence by adding additional data centers in Europe and Asia/Pacific. However, over 75% of its customer base is in North America. It has no data centers in Latin America or the Middle East and Africa. In addition, it does not decouple its runtime plane from its control plane, which may deter clients in these regions from considering it if they have strict data residency requirements.
- **Operations:** Relative to its competitors in this Magic Quadrant, Tray.io has a small employee base and runs in a handful of data centers across North America, Europe and Asia/Pacific. Clients considering Tray.io should evaluate how well the vendor can meet their disaster recovery objectives.
- **Sales execution and pricing:** Tray.io provides simple evaluation via a self-service trial, but does not provide public pricing and tailored pricing for different markets. Tray.io's direct customer base grew below market average, and a significant share of its revenue is generated from ISVs embedding Tray.io's integration capabilities into their products.

Workato

Workato is a Leader in this Magic Quadrant. It offers Workato Enterprise Platform for iPaaS capabilities. Workato is sold directly to end users and to ISVs seeking to embed integration

capabilities into their products.

Based in Mountain View, California, Workato's operations are predominantly in North America, Europe and parts of Asia/Pacific, with customers from all major industries. Workato plans to continue expanding its investment in standards compliance support, increasing the platform's appeal in the public sector and to customers operating in a regulated context.

Strengths

- **Product or service:** Workato earned strong product scores for its versatility, security features and breadth of functional capabilities. The biggest contributors to its scores are the productivity enabled by the platform's intuitive user experience, its prebuilt content, and application of AI to generate integrations and connectors.
- **Customer experience:** On Gartner Peer Insights, customers report very high satisfaction with both the product and the vendor, with a large percentage indicating they would recommend Workato to peers. Customer reviews frequently cite the platform's user or developer experience as a key strength.
- **Marketing execution:** Workato's growth in market mind share is a result of both its presence across mainstream application ecosystems' marketplaces and the successful execution of marketing initiatives. Such initiatives include AI and automation hackathons, university collaborations, presence at industry events and forming valuable partnerships with consultancies.

Cautions

- **Geographic strategy:** Workato relies on AWS data centers, and its expansion plan into other AWS data centers does not keep pace with other Leaders in this market. Although the vendor's sales footprint is global, prospective customers should verify Workato's data center and support footprint is suitable for their compliance posture and nonfunctional requirements, such as performance.
- **Sales execution/pricing:** Workato's pricing is based on a blended model of platform license and recipes, each allocated a set amount of tasks. Customers report that, while this model is easy to understand and predict, the costs escalate quickly, decreasing the appeal of implementing new process recipes on the platform.
- **Operations:** Compared with other Leaders in this Magic Quadrant, Workato has a smaller geographic presence with fewer offices globally. Prospects should ensure Workato can meet their expectations for local support resources.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we

have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

- Amazon Web Services
- Informatica

Dropped

- Talend: Talend's acquisition by Qlik on 16 May 2023 meant that it was dropped from this Magic Quadrant as, under Qlik, it would no longer meet the inclusion criterion for vendors selling and marketing a stand-alone product.

Inclusion and Exclusion Criteria

To qualify for inclusion, each provider must:

- Meet the market definition of iPaaS.
- Have a clear history of selling and marketing a generally available iPaaS licensed product for at least two complete years as of 31 August 2023.
- Sell and market iPaaS as a stand-alone product with no requirement to purchase or subscribe to any other services.
- Enable end users to implement integrations directly and not mandate the use of vendor- or partner-provided professional services.
- Implement all three of the following use cases for integration technology:
 - Data consistency
 - Multistep process
 - Composite service
- Provide secure connectivity for on-premises applications and data sources via some form of secure agent or networking without having to open inbound firewall rules.

Providers must also meet one of the following criteria:

- Have at least **\$50 million annual revenue** in FY22 from iPaaS subscription licensing sold as stand-alone SKUs.
- Have at least 2,000 unique paid **customer organizations** or **logos** subscribed, not individual users.

Providers must operate in **at least two** of the following geographies:

- North America
- Latin/South America
- Europe, the Middle East and Africa
- Asia/Pacific, including Japan and China

Gartner excludes vendors that:

- Require a specific third-party component or product to support core iPaaS capabilities that are not already repackaged into the vendor's platforms (i.e., branded, sold and supported directly by the vendor).
- Only sell their iPaaS software along with development or professional services, where the tool is used exclusively by the vendor's consultants or service providers.
- Require the purchase or subscription of other unrelated products or platforms offered by the same vendor (e.g., a CRM application or data management system).

Honorable Mentions

Gartner tracks more than 150 vendors that provide iPaaS products. We recognize five vendors with Honorable Mentions. Although they did not meet the inclusion criteria for this Magic Quadrant, they have an active presence in the market. Their iPaaS offerings serve as alternatives that may solve unique challenges for some customers. The vendors are:

- **Digibee:** Digibee is an iPaaS provider targeting integration specialists and software engineers. Digibee did not meet the revenue and customer number criteria for inclusion in this Magic Quadrant.
- **Scheer PAS:** Scheer PAS is a cloud provider that combines iPaaS with low-code application development and business process automation, as a unified platform. Scheer PAS did not meet the revenue and customer number criteria for inclusion in this Magic Quadrant.
- **SEEBURGER:** SEEBURGER is an established vendor providing iPaaS and managed services for B2B, EDI, API, MFT and cloud integration use cases. SEEBURGER did not meet the revenue and customer number criteria for inclusion in this Magic Quadrant.
- **WSO2:** WSO2's Choreo is a polyglot iPaaS and may appeal to software engineers looking to simplify their integration delivery. WSO2 did not meet the revenue and customer number criteria for inclusion in this Magic Quadrant.
- **Zapier:** Zapier is an iPaaS provider that targets citizen technologists to enable them to implement integrations and workflows targeting employee and departmental use cases. Zapier

did not meet the criterion for secure connectivity to on-premises applications and data sources.

Evaluation Criteria

Ability to Execute

We evaluate vendors' Ability to Execute in the iPaaS market using the following criteria:

Product or Service: This criterion assesses the organization's ability to provide a core offering that competes in and serves the iPaaS market. This includes current product and service capabilities, quality, feature sets and skills. This can be offered natively or through OEM partnerships. This criterion covers diverse capabilities, such as enterprise-grade operations, platform versatility, integration specialist productivity, ad hoc integrator productivity, citizen integrator support, event processing, and support for multicloud and hybrid deployments.

Overall Viability: This criterion is an assessment of the organization's financial health and the financial and practical success of the business unit. Our assessment includes the likelihood that the business unit will continue offering the product and will continuously invest in improving its capabilities. Key business indicators include company and product revenue, direct and indirect customer base, profitability, R&D investment ratios, and the balance of direct and indirect revenue.

Sales Execution/Pricing: This criterion assesses the organization's capabilities in all presales activities, including deal management, pricing and negotiation, presales support and the effectiveness of its sales channel. Key indicators include pricing transparency, pricing models that support various customer segments, ease of access for evaluation, and customer growth rates.

Market Responsiveness/Record: This criterion assesses the organization's ability to respond, change direction and achieve competitive success in response to changing market dynamics. Key indicators include the organization's history of responsiveness, frequency of release schedule, adjustment of platform features based on customer demand, understanding of market direction, and the new features it introduced during the past year.

Marketing Execution: This criterion assesses the organization's ability to deliver its messaging in a way that influences the market, promotes its brand, increases awareness of its products and establishes a positive perception of the product organization in the minds of buyers. Key indicators include the organization's publicity, promotional initiatives, thought leadership, word of mouth and sales activities. Of specific interest is the organization's ability to differentiate its buyer journeys and market presence.

Customer Experience: This criterion assesses the organization's ability to enable customer success through its relationships, products and services/programs. This criterion considers the ways in which customers receive technical support or account support. It covers ancillary tools, customer support programs, the availability of user groups, and SLAs. Key indicators include customer satisfaction with products, customer satisfaction with the vendor and customer willingness to recommend the offering to others.

Operations: This criterion assesses the organization’s ability to meet goals and commitments. Factors include quality of the organizational structure, skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently. Key indicators include staffing and organizational design, disaster recovery, ability to make new releases available to customers with minimal disruption, support structure and modalities, and partner networks.

Table 1: Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i> ↓	<i>Weighting</i> ↓
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	Medium
Marketing Execution	High
Customer Experience	High
Operations	High

Source: Gartner (February 2024)

Completeness of Vision

We evaluate vendors’ Completeness of Vision in the iPaaS market using the following criteria:

- **Market Understanding:** This criterion assesses the ability to understand buyers’ wants and needs and to translate that understanding into products and services. Vendors with the highest degree of vision listen to and understand buyers’ wants and needs, and can shape or enhance customer demand based on their vision. Key indicators include an understanding of the different integration personas and their buyer journeys; the breadth of evolving integration use

cases; the growing complexity of deployment models; and their ability to recognize, set and capitalize on trends.

- **Marketing Strategy:** This criterion looks for a clear, differentiated set of messages consistently communicated throughout the organization and externalized through a website, advertising, customer programs and positioning statements. Major traits include clear articulation of differentiators and marketing initiatives that support a differentiated industry understanding.
- **Sales Strategy:** This criterion assesses the strategy for direct and indirect sales, marketing, service and communication affiliates to extend the scope and depth of the organization's reach, skills, expertise, technologies, services and customer base. Key indicators are the vendor's different approaches for inside sales, marketplaces, direct sales, ISV/OEM sales and SI sales.
- **Offering (Product) Strategy:** This criterion assesses the vendor's approach to product development and delivery – especially differentiation, functionality, methodology and feature sets – with a view to fulfilling current and future requirements. Key indicators include features for enterprise-grade operations, platform versatility, integration specialist productivity, ad hoc integrator productivity and citizen integrator support. Other key features include the use of AI to facilitate development and operations, packaged integration processes (PIPs) and templates, hybrid multicloud deployment support, event processing and metadata management.
- **Business Model:** This criterion considers the design, logic and execution of the organization's business proposition for achieving continued success.
- **Vertical/Industry Strategy:** This criterion evaluates the vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments. Key indicators include platform ecosystems for: application domains such as ERP and CRM; industry focus such as healthcare, manufacturing or financial services; line-of-business processes such as marketing, sales and customer support; cloud platforms such as Alibaba, AWS and Google; and application vendor ecosystems such as Oracle, Salesforce, SAP and ServiceNow.
- **Innovation:** This criterion looks for direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, or defensive or preemptive purposes. Key indicators include the use of AI to ease integration challenges, facilities to enable collaboration between integration personas and support for emerging use cases (such as RPA, digital integration hub, enterprise nervous system/event stream analytics, and application composition). We also consider other innovations that align with emerging market or technology trends, including innovative pricing, go-to-market and sales models.
- **Geographic Strategy:** This criterion evaluates the vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographic areas outside its native area. Vendors may provide their services directly or via partners, channels and subsidiaries. Key indicators include the vendor's direct commercial and support presence in regions and countries, the data center locations of the iPaaS control plane (for development, governance and operations) and the runtime plane (for execution of integration processes).

Table 2: Completeness of Vision Evaluation Criteria

<i>Evaluation Criteria</i> ↓	<i>Weighting</i> ↓
Market Understanding	High
Marketing Strategy	High
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Low
Vertical/Industry Strategy	Medium
Innovation	Medium
Geographic Strategy	Medium

Source: Gartner (February 2024)

Quadrant Descriptions

Leaders

Leaders have a deep understanding of the iPaaS market. They have a record of strong execution and an ability to influence the market's direction. Leaders have a clear product roadmap to solidify the product's position and to help buyers protect their investments.

Leaders continuously expand their capabilities to deliver functionally rich platforms that bring significant value to customers. They support numerous integration use cases and address new business problems. They have a large network of partners that provide localized support and services to customers across most geographic regions.

Leaders are well-positioned to remain dominant as the iPaaS market evolves. However, their status cannot be taken for granted. In the fast-moving iPaaS market, vendors that lose focus will fall out of the Leaders quadrant.

Challengers

Challengers offer competitive platforms that deliver value in multiple integration scenarios (at least for certain industries or use cases). Challengers also demonstrate the financial strength and commitment to compete in the iPaaS market.

Challengers are well-positioned to succeed in this market. However, they often have a narrower focus of who the buyers are, what the use cases are or how users' expectations will evolve. As a result, their offerings have a more limited appeal than those of Leaders.

Challengers may lack a coordinated strategy for the various products in their platform portfolio, or their platform roadmap may be less complete than that of Leaders. Alternatively, they may lag Leaders in terms of marketing, sales channels, geographic presence, industry-specific content and innovation. To become Leaders, Challengers must improve in their specific areas of caution and match Leaders' platform capabilities and roadmaps.

Visionaries

Visionaries demonstrate a strong understanding of emerging technology and business trends by aligning their iPaaS capabilities with current demand. They understand the specific requirements of this market and are continuously innovating their technologies, delivery models and go-to-market strategies.

Visionaries may see their iPaaS offering as a key element of a broader integration strategy. They may branch out into hyperautomation use cases or application composition use cases by adding features for, respectively, robotic process automation (RPA) or low-code application development.

Visionaries may have a background in traditional on-premises integration middleware. As such, they have a good understanding of enterprise integration challenges. However, they may currently lack visibility or credibility outside of their existing customer base or domain. Further, they may not have the sales and marketing expertise required to build awareness for their offerings and sell beyond their traditional IT customer base.

To become Leaders, Visionaries must build stronger recognition of their platforms in new customer segments and drastically improve their sales strategy and execution to expand their market share.

Niche Players

Niche Players typically specialize in one vertical, geographical or functional area, or only address a segment of the iPaaS market. Niche Players may be startups or small companies just starting to succeed, or vendors focused on a specific subset of use cases, or vendors that provide a wide range of capabilities but lack market understanding or focus for their products. However, their technology offerings and degree of customer satisfaction within that segment are often excellent.

Niche Players' offerings can be suitable for organizations that require local presence and support, want a close relationship with a provider or seek a platform that addresses specific industry use cases and functional requirements. Niche Players that can fulfill these specific requirements may offset the viability risks associated with smaller vendors.

Niche Players are often popular targets for acquisition because they offer specialized iPaaS solutions that focus on a relatively narrow function or market segment. Their products often complement the broader integration strategies and platforms of larger vendors.

Context

Organizations of all sizes have increasingly fragmented IT environments. Integration is the act of connecting these IT systems together. These systems may be packaged applications or SaaS from vendors, custom applications built from the ground up, composed applications from a mix of custom and packaged capabilities, a wide variety of data sources, and devices such as mobile phones and tablets, or IoT and edge devices deployed in manufacturing plants or smart cities. These data and service assets may be internal to your organization or external over public or private networks. Each of these systems will have one or more interfaces to enable interaction with it. These could be user interfaces typically targeting humans, APIs or SDKs, either synchronous or asynchronous in usage to allow programmatic access of the systems and its services, or data services to access the data only.

Many technology categories help integrate systems together. Application integration suites, data integration tools, business process automation and B2B gateway software are the four major integration software categories to enable most integration use cases (for more details, see **Market Share: Integration Software Technologies, Worldwide, 2022**). Other tools, such as low-code application platforms, can also provide a limited set of integration capabilities, but mostly for their own use of connected data and services. Of course, you can always code or script integrations, but that brings with it a whole different set of challenges (see **5 Steps to Implement Code-First Integration**). iPaaS addresses all of these traditionally separate integration markets and has become the most popular approach for modern integration delivery.

Market Overview

The integration platform as a service (iPaaS) market demonstrated a strong growth rate of 37.6% in 2022, reaching \$6.5 billion in revenue. Remaining the fastest-growing enterprise software segment in 2022, iPaaS continues to be a rapidly evolving, high-performing market (see **Market Share Analysis: Integration Platform as a Service, Worldwide, 2022**). Early indications for revenue growth rates for 2023 are similar to 2022, resulting in the 2023 iPaaS market exceeding \$8 billion in revenue in line with the forecast (see **Forecast: Enterprise Infrastructure Software, Worldwide, 2021-2027, 4Q23 Update**).

Integration Personas Driving Market Differentiation

Integration technology was normally chosen based on its features and functions. This technology often would require several months of training to get used to the idiosyncrasies of each platform. Integration teams often would be under the control of the software engineering division or the

data and analytics division, depending on whether it was an application-centric or data-centric use case. This persona is referred to as the integration specialist.

Increasingly, different personas are now tasked with solving integration challenges. With software engineering becoming much more empowered to choose its own technology in many organizations, largely driven by increased expertise around agile, DevOps and platform engineering, code-first approaches have seen the arrival of new integration frameworks as an alternative to traditional integration platforms. This integration persona is the software engineer.

There has also been an explosion in adoption of SaaS technologies for many business units, such as HR, finance, marketing and sales. In these scenarios, it is often expected that the application administrator of the SaaS platform should be the one to integrate that software into the company's IT portfolio. This persona is referred to as the business technologist.

The remaining integration persona is the user of these SaaS applications. Users will be working on personal productivity and teamwork flow optimizations. We call this persona the citizen technologist. For more details of these personas, see **How to Optimize Your Integration Strategy to the Needs of Different Personas**.

With over 150 vendors currently being tracked by Gartner, it may seem impossible to distinguish between vendors from a feature function level. In reality, many of these vendors have come to market trying to solve very different problems from each other. Vendors with a history of integration technologies will often start from the view of the integration specialist. Vendors in the market that started as SIs or SaaS providers will target the business technologist, while vendors that started from an infrastructure perspective will target their services toward the software engineer. The more advanced the vendor, the more likely it will serve multiple integration personas and, in a few cases, enable collaboration between these integration personas.

Established Vendors Continuing Expansion Into Near Neighbor PaaS Services

Integration vendors often start with an application integration use case or a data integration use case, but will then add additional capabilities to compete across all of the major integration scenarios and even several of the more niche scenarios, such as IoT or manufacturing. Once at this point, it is common for them to look toward near-neighbor capabilities to help broaden the appeal of their platform.

For some vendors, this might be a move into the hyperautomation domain by adding capabilities such as robotic process automation (RPA), business process automation (BPA) and task/process mining (for example, Boomi Flow). For other vendors, this might be a move toward the application composition domain by adding low-code application platform (LCAP) services (such as Jitterbit Vinyl). Of course, this is not a one-way evolution, with LCAP, RPA, BPA and even CRM and ERP vendors adding more and more integration features to their product portfolios or partnerships (for example, Infor or Workday). This has led to increased competition for various integration use cases and increased confusion from customers and prospects around what tools to evaluate.

Generative AI Alters Client Perceptions

Generative AI (GenAI) has raised awareness among end users about the availability of AI-augmented integration delivery. Often shaped around simple connectivity use cases and targeted toward employee productivity use cases, GenAI demos have led many to believe that independent integration technology is no longer required. The reality is somewhat different, as the goals of a business function are not always aligned with enterprise needs. Integration vendors have recognized this and responded, with many adding GenAI features to the range of AI and ML services already available within their platforms. In fact, 2023 was a bumper year for AI-based announcements from the integration vendors included in this Magic Quadrant. We anticipate that these new capabilities will have a significant impact with regards to democratization of integration across the enterprise as end users get their hands on the technology throughout 2024.

Key Considerations for iPaaS Evaluation and Selection

To navigate the iPaaS market and to evaluate and select vendors, buyers must assess:

- The platform's intended goal (short-term tactical use versus long-term strategic use).
- The type and number of endpoints to connect: SaaS, packaged applications, internally developed applications, mobile apps, social media, file systems, IoT, data sources, data warehouses and data lakes.
- The provider's track record and familiarity with its industry.
- The integration skills of all their user personas and how they align with the platform.
- The vendor's SLAs and quality-of-service requirements, such as recovery time objective (RTO) and recovery point objective (RPO).
- The organization's security and regulatory compliance needs.
- The geographic location of the vendor's iPaaS data centers and support centers.
- The ability to deploy the iPaaS platform in a hybrid mode, including multicloud options across the iPaaS public clouds and IaaS public clouds, and within the customer's data centers.
- The availability and cost of iPaaS skills from the provider and external service providers.
- The long-term cost expectations and available budget.

We recommend that buyers develop a thorough understanding of their integration requirements and priorities before starting their iPaaS selection process (see **How to Implement Gartner's Integration Capabilities Framework**). In addition to the above list of considerations, they should be pragmatic and tactical by evaluating domain-specific iPaaS solutions that can deliver quick ROI.

Many software engineering leaders attempt to standardize on a single iPaaS to minimize complexity and contain costs. However, they may benefit from using multiple offerings to address

different use cases. Also, specialized iPaaS offerings may be more suitable for business unit leaders, for application teams working on severely time- and budget-constrained projects, or for meeting specific requirements where a purpose-built tool can drive higher productivity.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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