

Magic Quadrant pour la plateforme d'intégration en tant que service

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Les plateformes d'intégration en tant que service permettent aux entreprises de connecter les différentes applications, services et données nécessaires à l'efficacité de leurs opérations. Cette étude évalue 16 fournisseurs d'iPaaS afin d'aider les responsables de l'ingénierie logicielle à sélectionner les fournisseurs les plus adaptés à leurs besoins.

Définition/Description du marché

Gartner définit la plate-forme 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 des applications, des services et des 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'un des trois principaux modèles d'utilisation de la technologie d'intégration :

- **Cohérence des données** : la capacité de surveiller ou d'être notifié par les applications, les services et les sources de données concernant les modifications, et de propager ces modifications aux applications et 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 des applications, des services et des sources de données (par exemple,

pour « intégrer un employé » ou « traiter une demande d'assurance »).

- **Services composites** : la 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 cas d'utilisation d'intégration sont le plus souvent mis en œuvre via des environnements de développement intuitifs à faible code ou sans code, bien que certains fournisseurs fournissent des outils de développement plus complexes.

Caractéristiques obligatoires

Les caractéristiques obligatoires pour ce marché incluent :

- Un plan de contrôle fourni au client en tant que service cloud .
- Un plan de données d'exécution fourni au client en tant que service cloud ou sur l'infrastructure du client entièrement gérée par le fournisseur pour tous les correctifs et mises à jour logiciels .
- Une expérience de développeur permettant 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.

Caractéristiques communes

Les caractéristiques communes de ce marché incluent :

- Outils de cycle de vie de développement logiciel (SDLC) pour permettre la gestion du SDLC, y compris le contrôle de version, les tests et le déploiement .
- Role-based access control (RBAC) tools to control access to platform resources.
- Catalogs to discover integration assets such as APIs, events and connectors.
- Tools to enable operational monitoring, alerting, reporting and auditing of integrations, processes, pipelines and services in production environments.
- Packaged integration processes (PIPs) to accelerate integration delivery.
- AI augmentation to help generate documentation and build and test integrations.

- AI augmentation to help operate the platform.
- Secure connectivity to applications, services and data sources outside of the vendor-provided cloud.
- Intelligent document processing (IDP) features for processing scanned documents and file attachments.
- Task or process mining.
- Service discovery.
- Data discovery.

Magic Quadrant

Figure 1: Magic Quadrant for Integration Platform as a Service





Gartner.

Vendor Strengths and Cautions

Amazon Web Services

Amazon Web Services (AWS) is a Challenger in this Magic Quadrant. It offers several subscription services that address integration use cases. These include Amazon API Gateway, Amazon AppFlow, Amazon EventBridge, Amazon Kinesis, AWS AppSync, AWS Glue, AWS Lambda, AWS Step Functions and AWS Transfer Family.

AWS is based in Seattle, Washington, and its customers and operations are geographically distributed across various industries. Its typical buyers often sit in I&O and cloud teams and its end users are often software developers looking to integrate with applications and

systems running on AWS. This narrow focus on software developers and independent integration services, rather than a cohesive platform, limits AWS' Completeness of Vision score in this Magic Quadrant.

AWS plans to continue selling integration services as part of a broader developer-aligned composability strategy, and it strengthens this position by combining performance engineering practices and observability technology essential to composability initiatives.

Strengths

- **Sales execution/pricing:** AWS offers a transparent, pay-as-you-go pricing model that allows customers to pay only for the services they use without long-term commitments. It also provides tools such as the AWS Pricing Calculator and Cost Explorer, which help customers estimate and manage costs effectively.
- **Customer experience:** AWS provides one of the most comprehensive customer support experiences in the iPaaS market, with global 24/7 availability and extensive life cycle assistance that includes support for onboarding, migration and ongoing operations. AWS enhances this support by offering proactive guidance and advanced tools such as AI-driven insights.
- **Vertical/industry strategy:** AWS deploys specialized teams and solutions that are tailored to sectors such as financial services, healthcare and media. It supports this targeted strategy with an expansive network of industry-focused partners, which enables the vendor to deliver customized solutions across verticals.

Cautions

- **Product or service:** AWS' approach of providing separate integration services continues to be challenging for developers to navigate and use. Some additional capabilities (for example, for advanced EDI use cases and some application connectors) are provided by third parties via the AWS Marketplace, which require additional costs, coordination and management that could complicate the implementation process.
- **Market understanding:** AWS continues to focus on application developers' integration requirements and does not have a singular, cohesive, robust offering that considers the needs of commercial off-the-shelf buyers, line-of-business (LOB) users and other nondeveloper users, all of which are driving significant growth in the iPaaS market.

- **Offering (product) strategy:** AWS has not made it a top priority to enhance the cohesion of its offering to streamline its user experience across services or to simplify the implementation and governance process. Many other vendors evaluated in this research have heavily invested in product development for user experience improvements as a differentiator.

Boomi

Boomi is a Leader in this Magic Quadrant. It offers the Boomi Enterprise Platform, which includes Boomi AI, Boomi API Management, Boomi B2B/EDI Management, Boomi DataHub, Boomi Event Streams, Boomi Flow, Boomi Task Automation and Boomi Integration.

Boomi is based in Conshohocken, Pennsylvania. It operates primarily in North America but has a strong presence in Europe and a growing presence in the Asia/Pacific region. It is used by IT and LOB teams to address both enterprisewide and departmental integration and automation challenges by customers of all sizes and in multiple industries.

In 2024, Boomi acquired APIIDA's federated API management business and Cloud Software Group's Mashery to strengthen its API management capabilities. It also acquired Rivory to strengthen its data management capabilities.

Strengths

- **Market understanding:** Boomi has demonstrated a strong understanding of the requirements for different iPaaS use cases and integration personas, as well as the impact of AI on integration. This makes it attractive to customers and prospects seeking a general integration tool that can be used by multiple personas.
- **Innovation:** Boomi has delivered new capabilities for AI, API management, data management, event streaming and user persona collaboration through product investments and acquisitions to address new use cases. Boomi's regular release cadence and efficient feedback mechanisms enable the vendor to quickly respond to customer needs.
- **Marketing strategy:** Boomi has strong brand recognition as an iPaaS vendor. Its marketing messaging includes themes that resonate with buyers, such as AI, composability and simplicity. It tailors this to different use cases and industries and has a strong partner ecosystem, which helps buyers to clearly understand how the Boomi Enterprise Platform can address their use cases.

Cautions

- **Product or service:** At the time of this evaluation, Boomi's newly acquired API management and data management capabilities were not yet well-integrated into its platform, and customers may find using the new features to be a disjointed user experience. Boomi's capabilities for managed file transfer, intelligent document processing and robotic process automation (RPA) continue to be basic. Customers looking to use these capabilities should assess if Boomi's offerings can meet their needs.
- **Operations:** Boomi supports runtime deployment in data centers globally and as a self-managed data plane. However, the control planes for its services are not available locally in all regions. The Boomi Flow control plane component is supported globally, while the Boomi Enterprise Platform control plane is only hosted in the U.S. Customers should confirm whether Boomi can support their local operational and deployment requirements for the Boomi Enterprise Platform control plane component.
- **Geographic strategy:** Boomi remains a top five iPaaS vendor based on Gartner's estimates for revenue worldwide. However, while it is expanding in other regions, Boomi has a larger share of customers and revenue concentrated in North America compared to other vendors evaluated in this research. Customers outside of North America should monitor Boomi's strategy for sales in their region.

Celigo

Celigo is a Visionary in this Magic Quadrant. It offers Celigo integrator.io as part of its Celigo Platform. Celigo provides low-code integration and automation features, along with prepackaged integrations and connectors, such as Celigo Integration Apps and Quickstart Templates, and an integration app framework to build and monetize custom apps.

Based in Redwood City, California, Celigo's operations are primarily in North America, with offices in Europe and Australia. Its clients tend to be in the retail, technology, manufacturing and services industries.

In 2024, Celigo expanded its breadth of capabilities by improving its API management features, adding Celigo B2B Manager for EDI and providing a private cloud edition. It also added new AI features to improve ease of use, and built out its partner network in Latin America and the Asia/Pacific region to improve its offering globally.

Strengths

- **Sales execution/pricing:** In 2024, Celigo was one of the fastest-growing iPaaS providers in both revenue and number of new customers. This growth was driven by its ability to secure deals with small and midsize enterprises and LOBs in larger enterprises. While its average contract values are lower than larger players, some customers may see this as offering greater value for the money.
- **Innovation:** Celigo has been deliberate in its targeted use of AI within the platform, going beyond the builder experience to offer AI features such as exception management that improve the operational customer experience. Celigo's improved operational platform helps clients better address data issues compared to some of its competitors.
- **Customer experience:** Customer experience continues to be a strength for Celigo. In Gartner Peer Insights reviews, customers report high satisfaction with product capabilities and vendor support, with a large percentage indicating they would recommend Celigo to peers. Customer reviews frequently cite the platform's ease of use and time to value as key strengths.

Cautions

- **Overall viability:** Celigo is relatively small compared to the Leaders in this market, with estimated revenue approaching \$150 million and estimated customer numbers in the several thousands. While Celigo is an established iPaaS vendor and is clearly viable, it could be an acquisition target in this volatile market.
- **Marketing execution:** Celigo has not managed to increase its brand awareness as much as other vendors evaluated in this research, as measured by indicators like Gartner client inquiry presence and search volume, social media presence, and web traffic. This limited awareness restricts its ability to reach customers that could benefit from the platform's ease of use.
- **Product or service:** The vendor addressed some capability gaps in its product during 2024 by adding Celigo B2B Manager and API management capabilities. However, Celigo lacks native features for capabilities such as message/event brokers and intelligent document processing, which are standard features in leading iPaaS offerings.

Frends

Frends is a Niche Player in this Magic Quadrant. It offers a unified low-code experience for delivering integration, business process automation, API development and API management.

Based in Espoo, Finland, Frends was recently spun off from parent company HiQ. Its operations are primarily in EMEA and its client base is primarily Microsoft (Azure) customers from energy and utilities, manufacturing, retail, IT/software services and the public sector. Frends has continued to grow its business' sales and operations in the Asia/Pacific region, the Middle East and North America.

In 2024, Frends introduced Business Automation Portal to support nontechnical users, support for Decision and Model Notation, and enhanced its API management features.

Strengths

- **Sales execution/pricing:** Frends continues to offer a transparent, tier-based pricing model that allows customers to select packages based on their specific needs, with clear pricing available on its website. It can be purchased from Azure Marketplace with Microsoft Azure Consumption Commitment. This approach, combined with dynamic pricing per process, provides flexibility and cost predictability.
- **Product or service:** Frends integrates iPaaS functionalities into a cohesive platform, is best suited for Azure and .NET environments, and can accommodate hybrid deployments to revenue environments. With strong support for various integration scenarios and a unified user experience, Frends' capabilities in process orchestration, EDI, APIs, and extraction, transformation and loading enable organizations to streamline integration operations and enhance developer productivity.
- **Vertical/industry strategy:** Frends effectively targets key industries such as industry, energy, healthcare, banking, insurance and retail by tailoring its integration solutions to address specific regulatory and operational challenges. This strategy, along with its initiatives to enhance automation and security, strengthens the vendor's position as a reliable partner, especially in regulated industries. Frends also offers a full on-premises deployment option for regulated industries.

Cautions

- **Marketing execution:** Frends has relatively limited brand awareness compared to other vendors evaluated in this research, as indicated by metrics like Gartner client inquiry presence, search volume and social media presence, and may benefit from increased focus on expanding its mind share in this market.
- **Geographic strategy:** Frends' commercial and support presence is primarily in Europe and the Asia/Pacific region. In other regions, such as North America, Frends is available

via partners. Customers outside of those areas should assess the vendor's ability to provide localized support in their region.

- **Marketing strategy:** Friends' strategy for marketing messaging is narrower than larger competitors and, as a result, it does not sufficiently address goals and risks around emerging technology needs that differentiate leading iPaaS offerings. Prospects may lack awareness of its product's unique strengths and capabilities, potentially impacting its ability to capture greater market share.

Huawei Cloud

Huawei Cloud is a Visionary in this Magic Quadrant. It offers a range of iPaaS services, including ROMA Connect, Huawei EventGrid, Huawei API Gateway and four flavors of Huawei Distributed Message Service.

Based in Shenzhen, China, Huawei Cloud's operations are mainly focused in the Asia/Pacific region, with some presence in Europe, the Middle East, Latin America, South America and Canada. Its customers are primarily in the government, education, manufacturing, smart cities and energy industries.

In 2024, Huawei Cloud expanded the availability of ROMA Connect to 20 Huawei data centers around the world. It plans to continue expanding in Europe, the Middle East and Latin America, as well as increasing its partner network.

Strengths

- **Overall viability:** ROMA Connect grew by over 60% in 2024, with estimated annual revenue of more than \$100 million and about 9,000 customer organizations. While those figures are relatively small compared to some vendors evaluated in this research, ROMA Connect is a fundamental part of Huawei Cloud and its success, which shows the vendor's commitment to the offering.
- **Vertical/industry strategy:** Huawei Cloud's solutions are designed to address specific integration use cases in industries such as energy, manufacturing and smart cities. It plans to focus on these offerings in its marketing, sales and product development. Prospects with complex integration use cases should look to the vendor's industry solutions to see if they align with their integration challenges.
- **Innovation:** AI has been a major focus for Huawei Cloud. It has incorporated AI-augmented features into ROMA Connect for aspects like code creation and data

mapping. It is also used as the AI orchestration tool for customers building AI-based solutions on Huawei Cloud. The vendor plans to continue developing these capabilities and proving the value across its customer base.

Cautions

- **Marketing execution:** Huawei Cloud has not yet managed to increase its brand awareness for ROMA Connect as much as some vendors evaluated in this research have for their offerings, as measured by indicators like Gartner client inquiry presence and search volume, social media presence, and web traffic. This limited awareness restricts its ability to reach customers, especially in locations that are underserved by other vendors.
- **Product or service:** ROMA Connect is geared toward integration specialists and technical users. While it offers a well-rounded set of capabilities, it can be quite technical to use and has a limited range of SaaS connectors. It can connect to SaaS, but typically requires intervention from integration developers. Prospects seeking a less technical platform for citizen integrators may prefer alternatives.
- **Market responsiveness:** Although ROMA Connect releases new features once per month, it can take several release cycles before new features are available in production. Clients appreciate this regular cadence as it helps them manage change; however, those looking for a rapidly evolving platform may prefer alternatives.

IBM

IBM is a Challenger in this Magic Quadrant. It offers IBM webMethods as its primary iPaaS, which provides capabilities for application, data and B2B/EDI integration, API creation and management, and message and event processing. It also provides a separate range of integration offerings that include IBM App Connect, IBM API Connect, IBM MQ, IBM Sterling B2B Integration Suite and IBM Event Automation, which are available as SaaS services, stand-alone software and part of IBM Cloud Paks. IBM Red Hat provides other integration capabilities; however, they are not part of the assessment in this Magic Quadrant.

IBM is based in Armonk, New York. Its operations are geographically diversified and across all industries. Its users are predominantly integration specialists in central IT looking to address enterprise and business-critical integration challenges.

In 2024, IBM acquired webMethods and StreamSets from Software AG. IBM has stated its intention to unify the user experience and deployment models of its existing integration

capabilities with webMethods and StreamSets to deliver a more well-integrated hybrid iPaaS offering.

Strengths

- **Geographic strategy:** IBM's sales and support teams and its large partner network provide localized customer support in all regions. IBM has also expanded its data center and cloud provider support to include more regions and deployment options, and its tools support multiple languages.
- **Product or service:** IBM offers a suite of tools and operational capabilities that enable customers to meet complex integration needs and boost integrator productivity. The vendor's products provide extensive capabilities to address a broad spectrum of integration use cases, including data consistency, multistep processes, composite services, EDI, B2B, and events and messaging.
- **Operations:** IBM provides a wide range of deployment options, including hosting services on the AWS, Azure and IBM clouds, as well as hybrid and self-managed deployments with strong support for private clouds on OpenShift and other Kubernetes platforms.

Cautions

- **Offering (product) strategy:** IBM developed fewer new, innovative integration features in 2024 compared to the Leaders evaluated in this research. Specifically, IBM has been relatively slow in adding integration features for AI enablement.
- **Marketing strategy:** IBM's marketing messages focus on how the entire IBM ecosystem can solve broad enterprise challenges on different integration products addressing different use cases, instead of focusing on iPaaS capabilities being delivered as a platform. As a result, some customers lack awareness of IBM's iPaaS offerings.
- **Sales strategy:** IBM primarily targets integration specialists with its extensive functional capabilities designed for complex integration scenarios. Customers seeking an iPaaS tool optimized for business technologists and citizen developers may be unaware of IBM's offerings and capabilities.

Informatica

Informatica is a Leader in this Magic Quadrant. It offers the Intelligent Data Management Cloud (IDMC) platform, a primarily data-focused integration platform that includes Cloud API

and Application Integration, Cloud B2B Gateway, Cloud Integration Hub, API Manager, API Center, Cloud Data Integration and Cloud Mass Ingestion.

Based in Redwood City, California, Informatica's operations are geographically diversified, with customers across most industries. Its users are predominantly integration specialists.

In 2024, Informatica delivered a set of core platform innovations and AI-powered productivity enhancements, including the CLAIRE AI assistant and GPT experiences.

Strengths

- **Business model:** Informatica has a robust partner ecosystem, including partnerships with the leading hyperscalers and cloud data platforms, and it provides first- and third-party consulting services to deploy solutions more quickly. Informatica's flexible, consumption-based iPaaS offering enables customers to start small and scale as their needs evolve.
- **Vertical/industry strategy:** Informatica plans to deliver GenAI-powered solutions and offerings that provide customers with a single view of external entities (customer/citizen/patient/member) across multiple application and data platforms and meet their regulatory compliance requirements. The vendor offers industry solutions for banking and financial services, insurance, healthcare and life sciences, public sector, retail and consumer packaged goods, and manufacturing.
- **Market responsiveness:** Informatica added more than 500 customer feature requests in 2024. Some of its notable innovations include the addition of ready-to-consume process integration packages (recipes); the ability to build enterprise, no-code GenAI to develop integration using GenAI recipes; and full life cycle API management.

Cautions

- **Sales strategy:** Informatica primarily targets customers that have complex data-centric needs and require a sophisticated platform. Smaller customers in other regions with simpler needs may prefer alternatives.
- **Customer experience:** Although Informatica's pricing model allows customers to start small and scale, all the features of IDMC may overwhelm customers looking for a tactical solution. Some cite platform complexity and ease of use as areas for improvement.
- **Marketing strategy:** While Informatica has enhanced the process integration and automation capabilities of its IDMC offering, its external marketing focus is primarily on

data. Clients with broader application integration and process automation needs should evaluate those capabilities carefully.

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, low-code application development, and message queueing.

Jitterbit is headquartered in Alameda, California, and its operations are geographically distributed across all regions globally. Most of its customers are in the manufacturing, technology, healthcare, retail, media, education and nonprofit industries. Jitterbit is most commonly used by organizations seeking a broad set of capabilities from a single provider.

In 2024, Jitterbit released product features focused on applying AI for application development and integration to enhance developer productivity and enable a broader range of business users.

Strengths

- **Market understanding:** Jitterbit displays a thorough understanding of iPaaS buyer needs, addressing each of the core integration patterns and high-value B2B and internal integration use cases with messaging on its holistic set of capabilities from a single provider.
- **Offering (product) strategy:** Jitterbit Harmony effectively combines iPaaS, EDI, API management and a low-code application platform into a single AI-infused platform. This unified solution can enable users to build efficient, scalable integration workflows without the overhead of managing disparate systems.
- **Business model:** Jitterbit has leveraged acquisitions for positive business impact, namely in the low-code application platform space, enabling access to new market share and providing differentiation from some other iPaaS offerings.

Cautions

- **Marketing strategy:** Jitterbit demonstrates an understanding of the market, emphasizing AI innovation and platform breadth, but does not sufficiently differentiate its iPaaS offerings from those of larger competitors. As a result, prospects may lack awareness of how Jitterbit's platform could benefit them.

- **Vertical/industry strategy:** Jitterbit offers fewer industry-specific solutions, in comparison with its competitors. It is focused on broad industry themes, such as AI infusion, compliance and security, but does not directly address specific vertical industry needs, thus customers are less aware of the solutions it provides.
- **Operations:** While Jitterbit has a strong global commercial and support footprint, it does not have data centers in South America, the Middle East or Africa. The lack of data centers may pose challenges for customers with specific data residency and latency requirements.

Microsoft

Microsoft is a Leader in this Magic Quadrant. It offers Azure Integration Services (AIS), a set of cloud services to integrate applications, data and processes for the enterprise. The toolset includes Azure Logic Apps, Azure Service Bus, Azure Event Grid, Azure Functions, Azure Data Factory, Azure API Management and Power Automate.

Based in Redmond, Washington, Microsoft's operations are geographically distributed, with customers across all industries. AIS is most commonly used by customers looking to integrate with applications and systems running on Azure or wanting integration to be hosted on Azure as part of their cloud strategy.

In 2024, Microsoft rolled out new AI features globally for all integration services and added new connectors, notably for mainframe systems to support legacy integration requirements. It plans to continue pursuing a dual strategy of the Azure platform for IT specialists and Power Platform for business technologists.

Strengths

- **Geographic strategy:** Microsoft continues to have a strong global presence, with commercial and support operations in all major regions, including its Customer Success Units and Global Black Belt teams that provide customers with strategic guidance and operational resources for specific requirements. Azure offers customers more than 60 data center regions to address data residency, latency and regulatory compliance needs.
- **Business model:** AIS enables Azure customers to connect apps and data across on-premises and cloud environments. It uses Microsoft's strong AI capabilities to provide first-party integration to Azure AI services, so customers can build AI-powered automation and securely scale AI APIs. Its targeted growth areas include AI-driven

business process automation and migration of legacy on-premises integration tools (for example, BizTalk) to AIS.

- **Innovation:** Microsoft delivered numerous high-impact technology innovations in 2024, including enhancements to agentic automation features in Azure Logic Apps and tighter integration with Azure AI Foundry, as well as an enhanced developer experience for the low-code and code-first communities.

Cautions

- **Sales execution/pricing:** Microsoft uses different pricing models for each AIS service, which can make it difficult for customers to understand total costs. For example, Azure API Management offers two plans that each have multiple tiers: Azure Functions is billed based on execution time, number of executions, or vCPU and memory duration, and Azure Data Factory is priced based on pipeline orchestration, execution and number of operations. AIS does provide customers with cost calculators to estimate expenses based on expected usage, but Gartner clients have stated it is difficult to accurately predict costs as usage grows.
- **Vertical/industry strategy:** Microsoft continues to offer fewer industry solutions compared to other Leaders evaluated in this research. Prospective customers should evaluate AIS to ensure it supports their industry specific applications and use cases.
- **Customer experience:** Some customers have cited an inconsistent experience across the AIS suite, with little cohesion between capabilities and pricing models, and have raised concerns about limited support for on-premises and private cloud deployment. While the individual tools within AIS were highly rated by users, the overall experience was commonly cited as an area for improvement.

Oracle

Oracle is a Challenger in this Magic Quadrant. It offers Oracle Integration Cloud 3 (OIC 3) as its primary iPaaS. It combines application and data integration and business process automation, as well as offering API Gateway, Data Integration, Data Transforms, Events, Oracle Cloud Infrastructure (OCI) GoldenGate, Oracle Cloud Infrastructure Process Automation, OCI Queue, SOA Suite and OCI Streaming as other integration services.

Based in Austin, Texas, Oracle's operations are widely geographically distributed, with most of its customers in the U.S. and EMEA. It is used by IT and LOB teams to address integration

challenges by customers in multiple industries, predominantly where there is a requirement to integrate with other Oracle applications and systems.

In 2024, Oracle released OIC 3, which offers an updated user interface, improved performance, an expanded adapter library and more features for Oracle-centric organizations. OIC 3 places a greater focus on AI and the healthcare industry, driven by Oracle's 2022 Cerner acquisition.

Strengths

- **Industry/vertical strategy:** OIC 3 includes numerous prebuilt connectors to third-party applications that effectively target the needs of customers in industries such as healthcare, manufacturing and utilities. Integration between Oracle Fusion applications, Oracle Health (Cerner Millennium) and other electronic health record applications is a crucial component of this strategy.
- **Geographic strategy:** Oracle operates in more than 55 countries and has a global network of partners. Its iPaaS offering is deployed across 50 public cloud regions in 25 countries. Its global presence provides customers with local Oracle expertise in most regions and languages.
- **Operations:** OIC 3 has high availability across North America, EMEA, the Asia/Pacific region and Latin America. The platform provides strong disaster recovery capabilities, zero downtime upgrade and patching, and high-volume message throughput.

Cautions

- **Innovation:** Oracle's strategy for OIC 3 has prioritized its business automation vision and productivity improvements for existing customers. As a result of this strategy, it has released fewer innovative new features compared to the Leaders in this Magic Quadrant, especially in terms of AI features and those that target integration requirements for new integration use cases.
- **Offering (product) strategy:** Oracle's integration product suite consists of 12 separate product offerings. While the vendor is making progress in streamlining its operating models, the range of offerings complicates adoption for customers that need a combination of application, data and event-centric integration capabilities to address legacy and strategic integration needs.

- **Sales strategy:** Oracle's sales messaging primarily targets customers that are already using or plan to use its business applications. This limits its appeal for prospective customers not using an ecosystem of predominantly Oracle applications.

Salesforce (MuleSoft)

Salesforce (MuleSoft) is a Challenger in this Magic Quadrant. Its iPaaS offering is MuleSoft Anypoint Platform, which provides integration, API management, B2B partner management and automation capabilities. It is predominantly used by integration specialists for enterprise integration and API management challenges. The vendor also supports additional integration personas with different products such as Salesforce Flow, a process automation tool for business users.

Salesforce (MuleSoft) is based in San Francisco, California. Its operations are geographically diversified and it has customers across all industries.

In 2024, Salesforce (MuleSoft) was mainly focused on adding features to provide a connectivity foundation for its Salesforce Platform and Agentforce offerings.

Strengths

- **Operations:** MuleSoft Anypoint Platform offers a variety of deployment options, including cloud, hybrid and software-based models. It has control and data planes hosted in AWS data centers in North America, Europe and Japan, and is supported by a global network of partners that provide professional services for implementation.
- **Vertical/industry strategy:** Salesforce (MuleSoft) delivers multiple accelerators and industry-specific clouds to meet the unique integration needs of various sectors, such as financial services, healthcare, retail, communications and manufacturing.
- **Customer experience:** The vendor provides customer success support, including training programs for associates, developers and architects, boasting more than 47,000 certified users. In Gartner Peer Insights reviews, Salesforce (MuleSoft) receives high marks for customer satisfaction, with customers frequently recommending its platform. Reviewers highlight the platform's support, observability features and overall stability.

Cautions

- **Innovation:** In 2024, Salesforce (MuleSoft) provided several new features to enhance its Anypoint Platform integration capabilities and to support wider Salesforce initiatives like

Agentforce and using MuleSoft capabilities to improve API management support within its broader offerings. However, it delivered fewer new, innovative integration features specifically for its iPaaS offering, compared to the Leaders in this research.

- **Marketing strategy:** MuleSoft is increasingly positioned as a way to connect the Salesforce platform to third-party systems, rather than as a stand-alone iPaaS addressing any-to-any use cases. The vendor's integration services are increasingly spread across both Salesforce and MuleSoft branded offerings, adding further confusion around the overall positioning of MuleSoft in the Salesforce ecosystem.
- **Sales execution and pricing:** In Gartner client inquiries and Gartner Peer Insights reviews, customers have commented that Salesforce (MuleSoft) implementation costs can be high. This is often because of the recommended three-tiered, API-led integration approach, which focuses on reusability and composability. However, this approach may not be suitable for simpler use cases, as additional API layers can increase complexity, cost and development time.

SAP

SAP is a Leader in this Magic Quadrant. It offers SAP Integration Suite, which is part of the SAP Business Technology Platform (SAP BTP). It provides application, data, process, AI and business integration capabilities, both within and outside the SAP application ecosystem.

SAP is based in Walldorf, Germany, and it has geographically diverse operations and customers across multiple industries. It is predominantly used by customers that integrate SAP applications to other applications to address integration requirements.

In 2024, SAP added AI capabilities to improve developer productivity and operational excellence, and expanded the content of SAP Business Accelerator Hub to include more prebuilt integrations, APIs and partner-delivered artifacts. It also launched Edge Integration Cell to improve its support for hybrid environments, and it plans to further develop its prebuilt industry solutions.

Strengths

- **Offering (product) strategy:** SAP Integration Suite enables integration specialists and business technologists to use a composable, AI-assisted approach to develop integrated processes across the enterprise and external business partners. Its event mesh enables an event-driven architecture offering with event streaming, management and monitoring capabilities.

- **Vertical/industry strategy:** SAP Business Accelerator Hub contains prepackaged integrations covering both SAP and non-SAP scenarios across numerous industries, grouped by product, business process, domains and categories, such as APIs, events and adapters that help accelerate integration development and maintenance.
- **Geographic strategy:** SAP operates data centers across all geographic regions and can run on all the primary hyperscalers, as well as in customer data centers and data centers for regulated industries. SAP and its network of more than 26,000 partners can support customers across the world.

Cautions

- **Sales execution/pricing:** The vendor offers a consumption-based model for SAP BTP services, in addition to subscription-based plans with allocated messages. In Gartner client inquiries and Gartner Peer Insights reviews, customers have commented that it is difficult to correctly estimate consumption and that overage usage can be costly.
- **Innovation:** SAP released fewer innovative capabilities in 2024 compared to the other Leaders evaluated in this research, as it focused more on helping customers modernize their integrations. SAP's innovation roadmap includes AI agents for configuration and testing, more business accelerators, its Joule AI assistant for integration developers, and more flexibility in deployment. However, most Leaders are already offering several of these types of capabilities.
- **Business model:** The vendor primarily sells SAP Integration Suite and SAP BTP services alongside other SAP applications. While SAP Integration Suite can integrate non-SAP to non-SAP applications, its customer base is mostly made up of existing SAP customers that use the platform to consolidate their iPaaS and connect their SAP ecosystem to non-SAP applications and data.

SnapLogic

SnapLogic is a Visionary in this Magic Quadrant. It offers the SnapLogic Platform, which provides application integration, data integration and API management capabilities for integration specialists and LOB users.

SnapLogic is based in San Mateo, California. Its operations are mainly in North America, but it also has a strong presence in Europe and some presence in the Asia/Pacific region and the Middle East. Its customers are mainly in the technology, retail, financial services,

manufacturing and transportation sectors. It provides broad support for different integration personas and is used by both IT and LOB teams.

In 2024, SnapLogic augmented its platform with new AI capabilities to accelerate integration development and introduced a new AI AgentCreator offering.

Strengths

- **Innovation:** SnapLogic continues to release innovative AI features. In 2024, it delivered capabilities like SnapGPT, an AI assistant to accelerate integration, and AgentCreator to enable customers to build AI agents using integration capabilities.
- **Marketing strategy:** SnapLogic's marketing messages effectively highlight its key differentiators, especially in the areas of AI and legacy modernization. While it does not have the same level of brand recognition as its larger competitors, it has built strategic partnerships, such as with AWS and Snowflake, to help identify new opportunities.
- **Product or service:** SnapLogic has a strong track record for bringing new capabilities to market quickly. It provides extensive capabilities for data consistency use cases and the offering has a strong focus on security features and support.

Cautions

- **Vertical/industry strategy:** SnapLogic does not offer as extensive a range of vertical-specific capabilities as do some of its competitors, although it has customers across multiple verticals. Prospects with industry-specific needs should verify whether SnapLogic can meet their requirements.
- **Operations:** SnapLogic's cloud-hosted data planes are available across multiple regions, including North America, Europe and the Asia/Pacific region, and the platform also supports customer-managed deployment options. However, its cloud-hosted control planes are available only in North America and Europe. Prospects outside these regions should ensure that having a cloud-hosted control plane outside of their region meets their requirements.
- **Offering (product) strategy:** SnapLogic is one of the smaller vendors in this Magic Quadrant in terms of revenue, number of customers and number of employees dedicated to iPaaS. Given the vendor's investment in innovative AI capabilities, customers should ensure that their requirements are aligned to the vendor's core iPaaS use cases.

Tray.ai

Tray.ai is a Visionary in this Magic Quadrant. It offers Tray Universal Automation Cloud, which includes Tray Build, Tray Code and Tray Chat. Tray.ai'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.ai's operations are focused mainly in North America, with some presence in Europe and the Asia/Pacific region. Tray.ai has customers in all industries, with technology being the largest segment. It is used by integration specialists and business technologists to address enterprise and departmental integration needs, and provides strong support for embedding in other offerings.

In 2024, the vendor changed its name from Tray.io to Tray.ai and has enhanced its product's AI capabilities, focusing, for example, on how it can help build agents and orchestrate AI.

Strengths

- **Marketing strategy:** Tray.ai effectively highlights its AI-ready iPaaS capabilities and differentiates itself from competitors by emphasizing speed, flexibility and safety in AI integration. Its rebranding to Tray.ai and initiatives such as running AI Agent workshops demonstrate a strong focus on educating and engaging potential customers regarding its AI-focused capabilities.
- **Offering (product) strategy:** Tray.ai offers a unified architecture and integrated development environment experience that enables customers to efficiently develop, deploy and scale integrations. The platform supports integrations, automations, APIs and autonomous agents within a single interface.
- **Customer experience:** Tray.ai prioritizes ease of use and customer satisfaction by providing an intuitive user interface, tailored learning paths and certifications. Its Tray Academy and proactive customer engagement strategies offer additional guidance to help customers quickly develop and deploy integrations.

Cautions

- **Sales execution/pricing:** Tray.ai is a relatively small vendor in this Magic Quadrant and lacks the robust sales machinery and brand recognition that many competitors participating in this research have. This limits Tray.ai's ability to generate sales opportunities to win larger deals and grow market share.

- **Operations:** Tray.ai does not support runtimes in South America, the Middle East or Africa, as it has focused its expansion efforts in North America, Europe and the Asia/Pacific region. Customers should assess whether Tray.ai can meet their data residency and latency requirements.
- **Product or service:** Tray.ai excels at AI enablement; however, it lacks some capabilities that its competitors offer, such as advanced EDI support and comprehensive metadata management. Prospective customers should evaluate Tray.ai to ensure that it provides the capabilities required to support their use cases.

Workato

Workato is a Leader in this Magic Quadrant. It offers the Workato One platform, which includes Workato API Management, Workato Data Hub for MDM use cases, Workato Data Orchestration for data pipelines, EDI by Workato for B2B use cases, RPA by Workato and Workato Apps. It also includes Workato Agentic for building, deploying and managing AI agents.

Based in Mountain View, California, Workato's operations are mostly in North America, Europe and parts of the Asia/Pacific region, with customers across all industries.

In 2024, Workato released Workato EDI, Workato Data Hub, Workato RPA and Workato Genie. The vendor plans to continue expanding into the business process automation, application composition and AI agent domains. It also plans to add a private cloud version for regulated industries and to expand its support for compliance standards.

Strengths

- **Product or service:** Workato Orchestration Platform offers a wide range of functional capabilities, and its versatility enables customers to address numerous integration use cases. Workato expanded its platform even further in 2024 by adding new capabilities for B2B, MDM, RPA and agentic AI use cases.
- **Customer experience:** Workato customers consistently report high satisfaction with both the product and the vendor in Gartner Peer Insights reviews, with a large percentage indicating they would recommend Workato to peers. Customer reviews frequently cite the platform's ease of use and customer support as key strengths.
- **Innovation:** Workato was an early adopter of AI-augmented features within its iPaaS offerings. With its release of Workato Genie, it has effectively positioned itself to continue

delivering generative AI innovation. Workato is an appealing option for prospects looking to use AI-augmented development features or build AI-augmented integration processes.

Cautions

- **Offering (product) strategy:** Workato is quickly expanding its platform capabilities beyond iPaaS into several different directions, as indicated by its 2024 new feature releases and product roadmap. Prospective customers may have difficulty understanding Workato's product direction and how well it aligns with their longer-term business strategy.
- **Sales execution/pricing:** Existing customers report that Workato's pricing model is easy to understand, but costs escalate quickly. The vendor has introduced new capped pricing to address this, but those on existing plans may still get surprises.
- **Geographic strategy:** Workato operates in five AWS regions across the U.S., Europe and the Asia/Pacific region, lagging behind many of the other Leaders in this Magic Quadrant in terms of geographic reach. Prospects outside of those regions should press Workato about its plans to expand into more AWS regions in 2025.

Zapier

Zapier is a Niche Player in this Magic Quadrant. It offers Zapier Automation Platform for cloud integration and Zapier Enterprise for improved SLA and support options. Zapier also provides complementary services such as Tables for data storage and Interfaces for portals and dashboards, as well as a number of beta services focused on AI use cases.

Based in San Francisco, California, Zapier's operations are in North America and it has customers in multiple regions across all industries.

In 2024, Zapier focused on expanding into more enterprise use cases with improved SLAs, new data processing capabilities with Zapier Tables and a new UI capability with Zapier Interfaces.

Zapier declined requests for supplemental information. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Sales execution/pricing:** Zapier is one of the more cost-effective platforms for getting started with simple integration use cases and has become one of the most widely

adopted platforms among those evaluated in this Magic Quadrant. Zapier's publicly available pricing guide allows prospects to evaluate the various product tiers and data volume so they can get a feel for the platform costs.

- **Marketing strategy:** Zapier has strong brand recognition as an iPaaS vendor targeting cloud integration use cases, as measured by indicators like Gartner client inquiry presence and search volume, social media presence, and web traffic. Its marketing messaging focuses on the platform's ease of use and support for collaboration across business teams, application ecosystems and business processes, which resonate with business buyers.
- **Customer experience:** Zapier consistently receives high praise in Gartner Peer Insights reviews and on other customer review sites, with clients citing its breadth of integrations, ease of use and strong support community.

Cautions

- **Product or service:** Zapier's products target business users that focus on simple workflows and it lacks some of the capabilities required for more complex cases, such as API management, event streaming and EDI processing.
- **Geographic strategy:** Zapier's platform is based only in the U.S. While the vendor has customers distributed across the world, those outside the U.S. should verify whether Zapier can meet their data residency or industry compliance needs.
- **Vertical/industry strategy:** Given Zapier's focus on departmental workflows and cross-domain business processes, it has not developed industry-specific capabilities like some of its competitors have. Prospects with industry-specific needs should verify whether the vendor can meet their requirements.

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

- Zapier

Dropped

- Software AG: IBM acquired webMethods from Software AG in July 2024; as such, Software AG no longer meets the criteria for inclusion in this Magic Quadrant. Note that the webMethods technology is reviewed as part of IBM's evaluation.
- TIBCO Software: TIBCO Software continues to provide the TIBCO Platform for integrating applications, data, APIs, B2B and supporting managed file transfer. However, the vendor has stated that it no longer provides a vendor managed data plane for this offering; as such, it does not meet the criteria for inclusion in this Magic Quadrant.

Inclusion and Exclusion Criteria

Inclusion 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 one complete year as of 1 October 2024.
- 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 at least two 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:

- At least \$60 million annual revenue in FY 2023 from iPaaS subscription licensing sold as a stand-alone SKU *or*
- At least 3,000 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
- Middle East and Africa
- Asia/Pacific, including Japan and China

Exclusion Criteria

Gartner excludes vendors that:

- Require a specific third-party component or product to support core iPaaS capabilities that is 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 (for example, a CRM application or data management system)

Honorable Mentions

Gartner tracks more than 150 vendors that provide iPaaS products. We recognize the following 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 that targets software developers and integration specialists. Its customers are typically in central IT teams. Digibee did not meet the revenue and customer number criteria for inclusion in this Magic Quadrant.
- **Google:** Application Integration is an iPaaS solution in Google Cloud Platform that provides integration tools to connect and manage applications and data, with a particular focus on Google Cloud Platform services and third-party SaaS. Google did not meet the revenue and customer number criteria for inclusion in this Magic Quadrant.
- **Infor:** Infor provides Infor Intelligent Open Network (ION) as an iPaaS solution that is part of Infor OS. It provides capabilities to integrate Infor and third-party applications and systems. It is not available as a stand-alone product so does not meet the inclusion criteria for this Magic Quadrant.
- **Scheer PAS:** Scheer PAS combines iPaaS with business process automation in a unified platform. Scheer PAS did not meet the revenue and customer number criteria for inclusion in this Magic Quadrant.
- **SEEBURGER:** SEEBURGER provides the Business Integration Suite (BIS) platform. BIS is predominantly deployed for B2B and EDI use cases, although it also provides API, MFT, cloud, AI and agentic AI integration capabilities. SEEBURGER did not meet the revenue and customer number criteria for inclusion in this Magic Quadrant.
- **ServiceNow:** ServiceNow offers Integration Hub as part of the Workflow Data Fabric offering, as an iPaaS. Built on the ServiceNow AI Platform, Integration Hub is used by the vendor's customers to integrate ServiceNow with third-party data and applications. Integration Hub is not available as a stand-alone product, so it does not meet the inclusion criteria for this Magic Quadrant.
- **Workday:** Workday's core product includes an integrated iPaaS and a library of prebuilt connectors, enabling customers to integrate Workday with their enterprise ecosystem, including applications from the Workday Marketplace. It is not available as a stand-alone product so does not meet the inclusion criteria for this Magic Quadrant.

- **WSO2:** WSO2's Choreo is an internal developer platform that provides iPaaS capabilities. It is predominantly used by software developers looking to simplify their integration delivery. WSO2 did not meet the revenue and customer number criteria for inclusion in this Magic Quadrant.

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. These 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 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 and 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	Medium

<i>Evaluation Criteria</i>	<i>Weighting</i>
Customer Experience	High
Operations	High

Source: Gartner (May 2025)

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 customer needs, translate them into products and services. Vendors that show a clear vision of their market, the ability to listen, understand customer demands, and can shape or enhance market changes with their added 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 clear, differentiated messaging consistently communicated internally, and externalized through social media, advertising, customer programs and positioning statements. Major traits include clear articulation of differentiators and marketing initiatives that target different types of iPaaS buyers and demonstrate a differentiated industry understanding.

Sales Strategy: This criterion assesses the strategy for selling that uses the appropriate networks, including direct and indirect sales, marketing, service, and communication and business partners that extend the scope and depth of market reach, expertise, technologies, services and their customer base. Key indicators are the vendor's different approaches for IT and LOB buyers, use of marketplaces, independent software vendor (ISV)/OEM sales, and systems integrator sales.

Offering (Product) Strategy: This criterion assesses the vendor's approach to product development and delivery that emphasizes market differentiation, functionality, methodology and features as they map to current and future requirements. Key indicators include features for enterprise-grade operations, platform versatility, integration specialist

productivity, software developer productivity and business technologist productivity. Key features include the use of AI to facilitate iPaaS development and operations, support for AI enablement in the enterprise, packaged integration processes 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 (sales, product, development), skills and products to meet the specific needs of individual market segments, including verticals. Key indicators include platform ecosystems for application domains like ERP and CRM; industry focus such as healthcare, manufacturing or financial services; LOB processes like marketing, sales and customer support; cloud platforms such as Alibaba, AWS and Google; and application vendor ecosystems like Oracle, Salesforce, SAP and ServiceNow.

Innovation: This criterion looks for direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, 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 considered 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 geographies outside the “home” or native geography, either directly or through partners, channels and subsidiaries, as appropriate for that geography and market. Key indicators include the vendor’s direct commercial and support presence in regions and countries, and 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

Evaluation Criteria	Weighting
Market Understanding	High

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

Source: Gartner (May 2025)

Quadrant Descriptions

Leaders

Leaders have a record of strong execution and an ability to influence the market’s direction. Leaders tend to have a strong vision and market understanding, and can support diverse integration use cases and address new business problems.

Their platforms are cohesive and functionally rich, and there are regular releases to rapidly address the needs of this fast-evolving market. They have a clear product roadmap to solidify the product’s position and to help buyers protect their investments. 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 but may be limited to certain industries or use cases, or focused on a specific domain. Challengers demonstrate the financial strength and commitment to compete in the iPaaS market.

Challengers generally execute the types of work for which they offer functionality well, but have a lagging or incomplete view of the market's direction. Sometimes this is due to a lack of innovation in product, marketing and/or sales strategies, or a narrow focus on a single application domain. They often have a narrower focus of who the buyers are, what the use cases are or how users' expectations will evolve. They may have a background in traditional on-premises integration middleware or are a component in a large vendor ecosystem, and may currently lack visibility or credibility outside of their existing customer base or domain. 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 behind 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 strong innovation with a good understanding of emerging technology and business trends. They understand the specific requirements of the market and align their iPaaS capabilities with current demand by innovating their technologies, delivery models and go-to-market strategies. However, they may not have the sales and marketing expertise required to build awareness for their offerings and sell more widely.

Visionaries may have a background in traditional on-premises integration middleware or perhaps as cloud-native startups. They may see their iPaaS offering as a key element of a broader integration strategy. They may branch out into providing features that support enterprise AI initiatives, hyperautomation use cases or application composition use cases by adding features for, respectively, RPA or low-code application development.

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 focus on one vertical, geographical or functional area, or only address a segment of the iPaaS market. They may trail in broader market understanding and innovation because of less investment or because they deliberately occupy a niche within the market.

Niche Players may be startups or small companies just starting to succeed, 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. They can progress to other quadrants by improving their marketing strategy and fostering innovation.

Context

Software engineering leaders looking to address integration needs across the enterprise have traditionally needed to select and implement multiple integration products, such as application integration suites, data integration tools, business process automation and B2B gateway software. They may have also used the limited integration capabilities offered within other tools, such as low-code application platforms, or written their own code-based integrations.

An iPaaS solution provides an alternative to this fragmented approach. It is a provider-managed cloud service that can be used to address application, data, event, process, B2B and API integration use cases in a single tool. It provides transformation, routing and orchestration capabilities in a low-code/no-code environment, along with prepackaged integration solutions that can simplify integration use cases.

These capabilities are also essential to the success of AI initiatives. An iPaaS solution excels at connecting various data sources, cleaning and formatting data, and orchestrating the flow of data between different endpoints, making it an essential tool to enable AI across the enterprise.

The tools in the iPaaS market support the core set of common use cases but tend to differ in terms of personas supported, deployment options and the advanced integration styles they target, including their support for AI-specific requirements.

To navigate the iPaaS market and to evaluate and select iPaaS 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 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](#)). While buyers should use the above criteria to select a vendor that is the right strategic fit for their organization, they should also evaluate 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, application teams working on severely time- and budget-constrained projects, or meeting-specific requirements where a purpose-built tool can drive higher productivity.

Market Overview

The demand for software integration has never been higher. As organizations adopt AI, no-code/low-code platforms and SaaS to deliver software, they need a way to manage and connect the increasing sprawl of applications, services and data.

As the most popular integration solution, iPaaS remains the largest segment of the application and infrastructure middleware market. Gartner estimates that the iPaaS market revenue exceeded \$9 billion in 2024 — a major increase from \$7.8 billion in 2023 and \$5.9 billion in 2022. Gartner forecasts that the iPaaS market will continue to grow rapidly and will exceed \$17 billion in revenue by 2028 (see [Market Share Analysis: Integration Platform as a Service, Worldwide, 2023](#) and [Forecast: Enterprise Infrastructure Software, Worldwide, 2023-2029, 1Q25 Update](#)).

We have identified four key market insights that customers and prospects should understand when selecting the right iPaaS vendor for their organization.

AI Changed Expectations of What iPaaS Is Used for and the Capabilities It Must Provide

AI has become central to business applications and customer expectations. Leading enterprise application vendors, such as Salesforce, Workday, Microsoft and ServiceNow, all provide GenAI interfaces that simplify connectivity to disparate applications and data sources. As AI-augmented integration capabilities become more prevalent, customers may assume that those GenAI capabilities could replace dedicated integration technologies.

However, the reality is that these AI-augmented integration capabilities have limited business impact because they are geared toward basic, one-off integration tasks. Integration teams still need dedicated integration tools to safely scale complex integration between systems and data sources (see [How Generative AI Is Impacting Integration Teams](#)).

In fact, the rise of GenAI is actually strengthening the demand for iPaaS for two reasons. First, iPaaS vendors have added GenAI features to their platforms. GenAI features make it easier to develop and manage integration solutions, which will enable more citizen integrators across the organization to build integration processes. As GenAI capabilities democratize integration, organizations will consider iPaaS more attractive than alternative solutions, so will need more iPaaS user licenses.

Second, organizations are realizing that integration is essential to the success of their AI initiatives. Integration tools are required to connect AI to the data sources it needs to clean and format data into the structure required by AI models, and to manage and orchestrate the flow of data. Integration tools also help to enforce security and prevent unauthorized access to sensitive data. Vendors in the iPaaS market have responded to this need by adding new features that assist with use cases such as retrieval-augmented generation (RAG), fine-tuning, and creating and managing AI agents.

As a result, AI capabilities to support the building and running of integrations, and new features targeted at supporting enterprisewide AI initiatives, are becoming key differentiators when choosing among vendors. However, even the leading vendors do not yet address all of the areas consistently.

The Capabilities of iPaaS and Adjacent Technologies Are Converging

iPaaS vendors are expanding their platforms beyond core integration capabilities.

In 2024, several iPaaS vendors strengthened their API management capabilities. For example, Boomi acquired Cloud Software Group's Mashery and APIIDA, and Tray.ai and Workato announced new, enhanced API management capabilities. Some vendors added or enhanced their events and messaging or B2B/EDI capabilities, as seen with Celigo's B2B Manager and Jitterbit EDI. Other vendors added capabilities for RPA, business process automation, task/process mining and low-code application platform services.

At the same time, vendors in those adjacent technology markets have also added more integration features to their product portfolios or partnerships. This convergence can be confusing for customers and prospects, as it is unclear which tools they should evaluate (see **Quick Answer: Beyond RPA, BPA and Low Code — The Future Is BOAT**).

Different iPaaS Vendors Target Different Integration Personas

In many organizations, integration is no longer solely the responsibility of dedicated integration specialists. Other integration personas, such as software developers and citizen integrators, are involved in building and managing integrations. Each persona has a different level of integration expertise. To efficiently build integration, organizations need tools that provide the right features and user experiences to suit every integration persona.

In the iPaaS market, vendors differentiate their offerings based on which integration personas they best serve. iPaaS vendors that have always focused on integration technologies will often target integration specialists. Vendors that started as systems integrators or SaaS providers tend to target citizen integrators, and vendors that started as infrastructure providers typically target software developers. The most advanced iPaaS vendors are more likely to serve multiple integration personas and, in a few cases, enable collaboration between personas.

iPaaS Vendors Are Partnering With Application Vendors to Provide Embedded Integration Capabilities

Integrating a new SaaS or other packaged application with the rest of an application portfolio can be expensive and complicated. Application vendors are trying to simplify this process and differentiate their products by providing built-in capabilities that enable workflow automation and data syncing. However, they also recognize that integration is not their speciality.

As a result, iPaaS vendors are increasingly offering integration capabilities either as embeddable components in a packaged application or as a solution on the application vendor's marketplace. These prebuilt iPaaS capabilities are a key differentiator for application vendors looking for an integration partner.

⊕ Evaluation Criteria Definitions

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