Market Share: Application Infrastructure and Middleware, Worldwide, 2020

The application infrastructure and middleware software market grew 8.9% in U.S. dollars in 2020, reaching $41 billion. Cloud-native vendors continue to challenge the market position of established providers.

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Overview

The application infrastructure and middleware (AIM) software market grew 8.9% in 2020 to $41 billion, raising its status as the fourth largest enterprise software segment (overtaking ERP), and it is still one of the most dynamic despite the COVID-19 pandemic. This confirms AIM software as a segment of the
enterprise software market that continues to thrive and grow above the overall software industry average.

We have visibility into over 970 vendors operating in the AIM market. The vast majority of these players offer either a single functionality or a small portfolio of products that address one or two AIM capabilities. Generally, fast-growing vendors offer some very specific point capability. Meanwhile, major vendors, several of which have been in this business for decades, have expanded their AIM suites into platform as a service (PaaS), in many cases via technology-focused acquisitions. These market dynamics create opportunities and uncertainty for the largest providers, which tend to be technology followers that are repositioning to exploit their best options for growth.

Large providers must make a series of critical decisions about where and how to compete in a dynamic AIM market. We have observed the essential characteristics of several on-premises solutions, some key PaaS offerings and some in-memory computing technologies to better illustrate the options that large providers have in this technology area.

Within the AIM market, we have several of the fastest growing segments in the entire software industry: RPA, iPaaS, aPaaS and API management.

The pivot table and relative summary tables in this report offer you the possibility to view the 2018 and 2019 total software revenue and vendor market share for each subsegment of the AIM software market:

1. Application Integration Suites
2. Application Platform Software
3. B2B Gateway Software (Stand-Alone)
5. Digital Experience Platforms (DXPs)
6. Event Brokers & Messaging Infrastructure
7. Event Stream Processing (ESP) Platforms (Stand-Alone)
8. Full Life Cycle API Management
9. High Control aPaaS
10. High Productivity aPaaS
11. Integration Platform as a Service (iPaaS)
12. Managed File Transfer Suites

13. Other AIM

14. Robotic Process Automation

15. Transaction Processing Monitors

The following regions are covered in this report: North America (the U.S. and Canada), Latin America, Europe (Western Europe and Eastern Europe), Eurasia, the Middle East and North Africa, sub-Saharan Africa, Mature Asia/Pacific, China and Emerging Asia/Pacific.

The data in the .zip download contains one or more Excel reports, along with data formatted in a comma-delimited flat file (.csv) that can be imported into a variety of other applications.

Document Revision History

Market Share: Application Infrastructure and Middleware, Worldwide, 2018 - 29 April 2019
Market Share: Application Infrastructure and Middleware, Worldwide, 2017 - 6 June 2018
Market Share: Application Infrastructure and Middleware, Worldwide, 2016 - 6 July 2017

Recommended by the Authors

Market Share: Enterprise Infrastructure Software, Worldwide, 2019

Market Definitions and Methodology: Software

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