Market Share: Integration Software Technologies, Worldwide, 2020

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Initiatives: Technology Market Essentials

The market for software and cloud technologies integration grew by 10.2% in U.S. dollars in 2020, reaching $21.9 billion. Cloud-native vendors continue to challenge the market position of established providers.

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Overview

The market for software and cloud technologies enabling integration grew 10.2% in U.S. dollars in 2020, reaching $21.9 billion. It is still the most dynamic despite the COVID-19 pandemic. This confirms the
place of integration as an extremely strategic theme of the enterprise software market that continues to thrive and grow above the overall software industry average.

Traditionally, organizations have addressed the hybrid and multicloud integration challenge by using different integration platforms that are capable of addressing a specific set of use cases — for example, integration platforms as a service (iPaaSs), enterprise service buses (ESB), API management (APIM), B2B integration or data integration. Several vendors have now made available integration platforms that can address a wide range of hybrid and multicloud use cases (including application integration, data integration, API management and electronic data interchange [EDI] integration) often in the form of product suites. Nonetheless, software engineering leaders and vendors should assume that they will have to deal with more than one integration platform — possibly from different providers — to support all their use cases.

There are specific reasons for including FLAPIM and RPA in this research on integration.

If FLAPIM only ever managed the life cycle of the APIs then it would not be an integration technology, but most API management products allow for protocol and data transformation between the inner and outer APIs as part of a policy, which is similar to what most ESB and iPaaS also deliver. Many FLAPIMs go beyond simple policy and allow for the creation of composite services or process APIs which are also major uses of integration technology.

RPA creates process flows connecting via the UI but increasingly via APIs. In fact, the larger RPA vendors are actively competing with the iPaaS market for API orchestration, with UiPath buying Cloud Elements as a recent example of the overlap between iPaaS, RPA, LCAP and BPM.

The vast majority of vendors selling integration technologies offer either a single functionality or a small portfolio of products that address one or several integration capabilities.

This specific market share report aggregates selected segments of the Application Infrastructure and Middleware portfolio:

- Integration Platform as a Service (iPaaS)
- Application Integration Suites
- BPM Suites
- Event Brokers & Messaging Infrastructure
- Full Life Cycle API Management
- Robotic Process Automation
- Managed File Transfer Suites
and of Data Management Software:

- Data Integration Software
- Master Data Management Software
- Other Data Integration Software

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.

### Acronym Key and Glossary Terms

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<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
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<tbody>
<tr>
<td>AD</td>
<td>application development</td>
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<tr>
<td>AI</td>
<td>artificial intelligence</td>
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<tr>
<td>AIM</td>
<td>application integration and middleware</td>
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<td>aPaaS</td>
<td>application platform as a service</td>
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<tr>
<td>BPM</td>
<td>business process management</td>
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<tr>
<td>BPMS</td>
<td>business process management suite</td>
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<tr>
<td>CAGR</td>
<td>compound annual growth rate</td>
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<tr>
<td>ESB</td>
<td>enterprise service bus</td>
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<td>FLAPIM</td>
<td>full life cycle API management</td>
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<td>HIP</td>
<td>hybrid integration platform</td>
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<td>hpaPaaS</td>
<td>high-productivity aPaaS</td>
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<td>ICC</td>
<td>integration competency center</td>
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<td>IMC</td>
<td>in-memory computing</td>
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<tr>
<td>IMDG</td>
<td>in-memory data grid</td>
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<tr>
<td>IoT</td>
<td>Internet of Things</td>
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<tr>
<td>iPaaS</td>
<td>integration platform as a service</td>
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Evidence

This research required data collection and preparation of market statistics information. Prevailing market conditions and political and economic events that affect vendor performance, such as regulations, M&As, worldwide economic recovery and new-version migration, have been taken into account.

Gartner uses public sources of information and works with software vendors to establish estimates for the market. Information from Gartner's secondary research and internal community meetings has also been used to arrive at certain conclusions. The data in this research is published as Gartner estimates/opinion, not as facts that the vendor reported.

Notes
This is a composite market created by aggregating several segments relevant to “integration” capabilities of the Application Infrastructure and Middleware (AIM) and some segments of the Data Management markets.

Recommended by the Authors

Market Share: Enterprise Infrastructure Software, Worldwide, 2020

Market Definitions and Methodology: Software