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Integration Platform as a Service: A Market at a Turning Point

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In this paper

The secret of iPaaS success: versatile support for both integration and automation use cases

> Integration Platform as a Service (iPaaS) is a cloud service aimed at enabling organizations to develop, run and manage integration processes that connect applications, data sources, APIs, events and devices across hybrid, multi-cloud environments. Organizations use iPaaS technologies to synchronize data across multiple systems, automate business processes involving systems and humans and to implement APIs.

With an iPaaS you can connect your sales management SaaS application with the ERP system running in your on-premises data center. You can feed data from a variety of cloud and on-premises sources into your cloud-based data lake. You can publish APIs and events out of your legacy applications. You can automate end-to-end processes that involve multiple applications, employees and business partners. And you can implement many other scenarios (see figure 1).

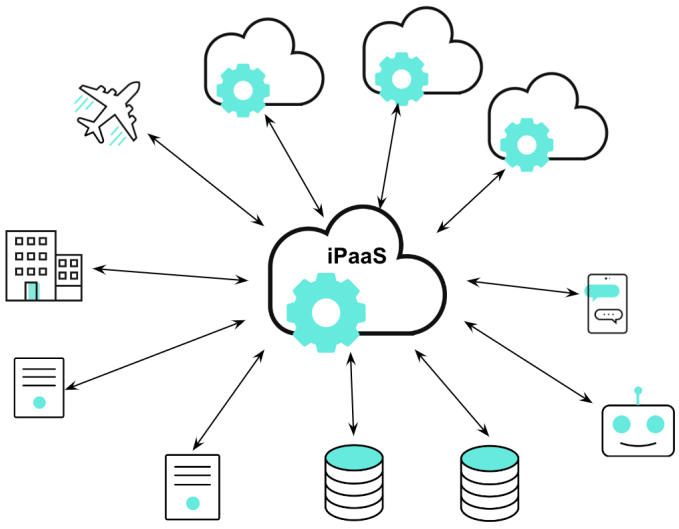

Figure 1 - Integration Platform as a Service (iPaaS)

Simply put, an iPaaS provides you, in the form of a cloud service, a combination of the functionality that's typically provided by traditional integration and automation platforms such as enterprise service buses (ESBs), data integration tools, business process management (BPM) platforms, business-to-business (B2B) gateways, API management and others. As such iPaaS is, in many cases, the ideal platform to target what we call the enterprise automation challenge.

iPaaS seems to receive less recognition by the press, analysts and consultants than other categories of enterprise automation technologies, namely API management and robotic process automation (RPA). Nonetheless the iPaaS category is the largest and fastest growing. According to Gartner®[1], iPaaS grew by 40.2% in 2021, reaching $4.8 billion in end-user spending. The iPaaS market is expected to exceed $15 billion by 2027[2]. As per our calculation, in 2027 the iPaaS market will be more than twice the size of the API management sector ($7 billion) and about 2.5 times larger than RPA ($5.6 billion). We think that with the exception of data integration software, all the other enterprise automation segments will be dwarfed, as they are expected to grow modestly, if not decline (see figure 2).

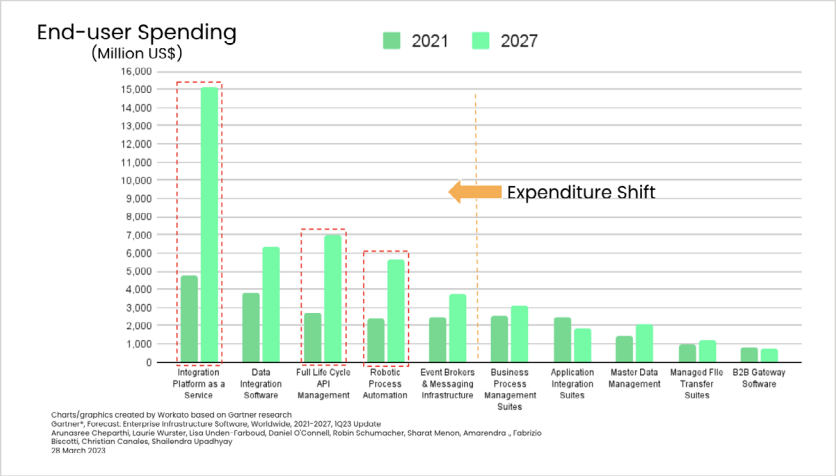

Figure 2 - Enterprise Automation Technologies Market Forecast 2021-20272

1 Gartner®, Market Share Analysis: Integration Software Technologies, Worldwide 2021, Varsha Meta, Fabrizio Biscotti, Harshita Chibber, Sharat Menon, Keith Guttridge, Nicholas Carter, 9 September 2022.

2 Gartner, Charts/graphics created by Workato based on Gartner research
Gartner®, Forecast: Enterprise Infrastructure Software, Worldwide, 2021-2027, 1Q23 Update Arunasree Cheparthi, Laurie Wurster, Lisa Unden-Farboud, Daniel O'Connell, Robin Schumacher, Sharat Menon, Amarendra ., Fabrizio Biscotti, Christian Canales, Shailendra Upadhyay, 28 March 2023

What are the reasons for the remarkable success of iPaaS? And why are there such high expectations for its market growth? There are many factors, including:

- **More enterprise automation work.** IT megatrends such as cloud, mobile, IoT, social, API and analytics are generating new enterprise automation scenarios and requirements that must be addressed.
- **Cloud adoption.** As organizations move to the cloud and take advantage of SaaS applications, adopting a cloud-based integration platform makes a lot of sense from the architectural and technical standpoints.
- **Larger market**. Most iPaaS vendors have packaged and priced their offering in a way that is more accessible to midsize organizations and LoBs, for which traditional platforms, such as ESBs or BPM tools, were simply prohibitive in terms of investments and skills.

However, two characteristics are particularly crucial to explain iPaaS' widespread adoption and growth:

- **Versatility.** Unlike traditional platforms, which are typically focused on supporting a specific requirement (for example, data integration), organizations can use iPaaS to address a wide range of scenarios, such as application and data integration, process automation, partner integration, API publishing, and event processing.
- **Support for a range of constituencies.** By having adopted a low code, AI-assisted development paradigm, many iPaaS enable not only a few super-skilled integration engineers, but also much wider constituencies, including application developers, SaaS administrators, business analysts and, in some cases, business users. This favors widespread adoption within iPaaS buyers, whether that's midsize or large organizations.

The net-net is that iPaaS is not only eating market share from traditional enterprise automation tools, but also fulfilling requirements and targeting constituencies that traditional tools could not address at all.

ACTION ITEMS:

- **Test the waters** by looking for a couple of enterprise automation scenarios for which an iPaaS could be a good fit.
- **Adopt iPaaS with a strategic mindset.** It will likely become the cornerstone of your enterprise automation strategy.
- **Plan for a coexistence with previous generation technologies.** An iPaaS could complement them and play an "orchestrator" role.
- **Look for opportunities to replace "legacy" technologies.** Often the best way to get rid of obsolete enterprise automation technologies is by replacing them with an iPaaS.
- **Select an iPaaS that can address the four enterprise automation trends.** That is, integration/automation convergence, new emerging scenarios, business technologist audiences, and the democratized delivery model.

For more details, see the final chapter of this document.

Four trends impacting the enterprise automation technology market

Thus far, iPaaS characteristics have paid off in terms of popularity, adoption, and user organizations' investments. That said, its future prospects are even rosier due to the following key trends:

1. Integration & automation convergence into enterprise automation
2. Proliferation of enterprise automation use cases and scenarios
3. Extending constituencies
4. Diversifying operating models

TREND #1

Integration & automation convergence into enterprise automation

For the longest time integration and automation were considered two distinct disciplines that targeted different needs. Integration was an affair of IT departments that desperately tried to make "independently designed systems work together". This included downloading sales data from a CRM application and uploading it to the company's ERP system, or extracting data from a bunch of disparate systems and pushing the data into the organization's data warehouse. Business leaders considered these as mundane, highly-technical and "boring" problems. At best, a "necessary evil".

Automation, that is "using machines and computers to do work that was previously done by people", was, instead, perceived as more of a business-oriented discipline that could deliver tangible and measurable business benefits, typically in the form of efficiency improvements. As such, it captured the attention of business leaders (and business consultants), which could link technologies such as RPA and BPM to a clear business goal: reducing costs and improving efficiency.

However, more and more CIOs, their IT managers, and business leaders are realizing that automation requires integration technology to support processes that not only

encompass people but also SaaS and legacy "green screen" applications, mobile apps, business partners, as well as devices and robots. Similarly, it is becoming increasingly clear that integration technology must serve not only the classic problem of synchronizing data across multiple systems, but also process automation use cases, which typically leverage API and events, as well as more rudimentary forms of integration, such as the dreaded "screen scraping" technique.

Recognizing such interdependency, progressive CIOs and IT managers are tackling integration and automation in a holistic way: as two sides of the same coin. We refer to this coin as enterprise automation. iPaaS, with its ability to address both integration and automation scenarios, is, from a technology perspective, an engine propelling this convergence.

As organizations embrace the holistic enterprise automation strategy, they will find it natural to look at iPaaS as an indispensable technology enabler for such an approach.

TREND #2

Proliferation of enterprise automation use cases and scenarios

Enterprise automation is, by definition, about addressing three fundamental use cases: data consistency, multistep process and composition. These use cases were identified in the late 1990s, but traditionally they were addressed separately, often using different tools. The modern approach is instead to consider these use cases as three different aspects of the enterprise automation challenge.

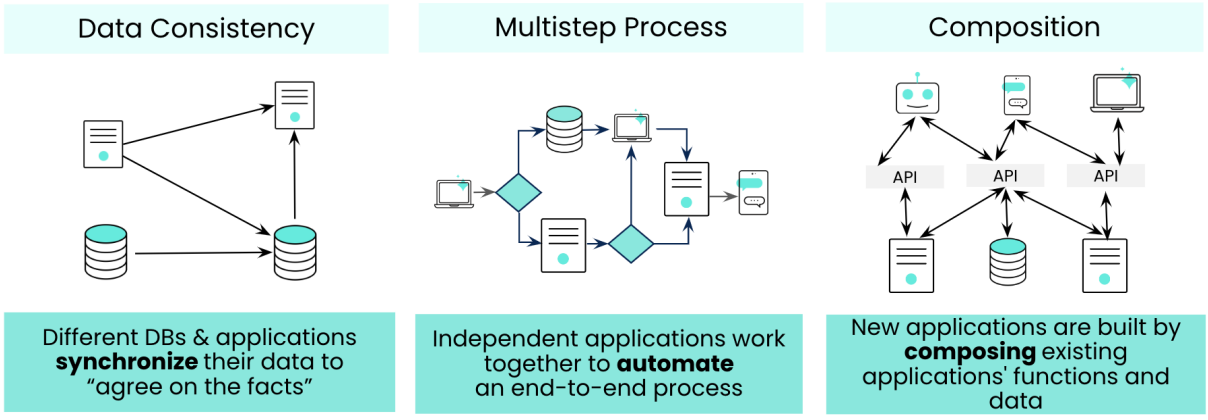

Figure 3 - The Three Fundamental Enterprise Automation Use Cases

Data consistency is what most people would call “integration”: moving data across different systems so that their data is in sync. Multistep process is the classic end-to-end process automation issue. Finally, composition refers to the problem of exposing (or “publishing”) established data and application functions via APIs (and/or event channels) so that developers can “compose” these data and functions with other capabilities to build up a new application. A mobile banking app, as an example, is “new”, but it uses, via APIs and event channels, the functionality and data of the “old”, mainframe-based core banking system. Each real life enterprise automation scenario maps into one or a combination of these three use cases.

Those real-life scenarios, which virtually every organization must, sooner or later, address, include classic issues like application and data integration, process automation, B2B integration and API publishing, which are typically supported by the iPaaS offerings in the market.

However, new scenarios - for example, events ingestion and delivery, digital integration hub and edge/IoT integration - keep emerging. Normally when there is a new requirement, a new category of IT products appears in the market to fulfill that particular need. However, once again, the iPaaS technology is demonstrating its versatility: several commercially available iPaaS offerings already provide, or will soon provide, support for these and possibly other, more advanced scenarios (for example, metaverse, blockchain or conversational AI integration).

> iPaaS ability to support both classic and emerging enterprise automation scenarios will inevitably foster its adoption even further.

TREND #3

Extending Constituencies

As mentioned previously, user organizations are facing a growing number of enterprise automation challenges due to the increasing fragmentation of their application portfolio and data assets, which is driven by cloud, mobile, IoT and other phenomena. Consequently CIOs and IT managers must tackle two new critical issues:

- Improve their teams' productivity to keep pace with the business teams' demand for more and more enterprise automation.
- Delivering enterprise automation anywhere it is needed, such as in local units (that is, functional teams, business operation teams, application teams, LoBs, subsidiaries, departments and workgroups), and even at the individual level.

In the second half of the 2010s, pioneer organizations discovered that an effective way to overcome these two issues was to empower a lot more people than the few enterprise automation specialists they had in their IT departments. Application and API developers as well as SaaS/application/data/process administrators may want to tackle their specific enterprise automation issues by themselves instead of waiting for specialists to become available. From a business perspective, the goals are to increase efficiency, improve business agility and spread opportunities for innovation, not only at the macro, organization-wide level, but also at the micro, local units level.

However, not surprisingly, even in enterprise automation "appetite comes with eating", as the old adage goes. Therefore, several organizations are pushing this approach to the next level and, as a result, another constituency recently came to the fore: business technologists (also known as "citizen automators"). These employees do not report into any IT department, but they have enough IT skills to use low-code tools for performing enterprise automation work to help themselves or their team. Business technologists is not a marginal phenomenon.

According to Gartner[3] "45% of organizations report that many or most of their employees are now business technologists."

Traditional enterprise automation tools were not conceived to support such an extended set of constituencies, each with its own specific skill profile and needs. They were primarily focused on supporting specialists at a very granular level of qualification: data integration specialists, application integration experts, process automation gurus etc.

iPaaS technology, instead, initially focused on SaaS administrators and application developers and from there, quite naturally, it has been expanding its reach to both specialists and business technologists.

> As more constituencies within organizations want to have access to enterprise automation technology, iPaaS adoption will not only extend to more and more organizations, but also experience increasing adoption within individual organizations, thus progressively enlarging the iPaaS user base and, ultimately, growing the market.

TREND #4

Diversifying operating models

Enterprise automation delivery has traditionally been based on two primary operating models:

- Centralized, by which delivery is carried out by a centralized team (competency center or center of excellence) consisting of a squad of architects, engineers, and developers who are totally focused on implementing a highly efficient "enterprise automation factory". According to this model, local units commission the central team to implement and deliver the enterprise automations they need. This model

3 Gartner, Create Crowdsourcing Communities That Enable Business Technologists to Innovate, Enterprise Architecture Research Team, 3 August 2022.

has proven to be highly efficient because of the optimal allocation of technical and human resources, but it has also shown its lack of agility because, as demand grows, the central team, no matter how big or small, inevitably becomes an organizational bottleneck.

- Federated: by which delivery is directly performed by semi-independent local units that use whatever enterprise automation tools they wish. This model is highly agile and effective in sorting out local issues, but it lacks an organization-wide perspective and its inherent lack of governance also leads to high costs, duplication of technology and skills, and mounting technical debt.

An approach that is rapidly gaining popularity is the so-called democratized model—where delivery is carried out by the local units (and business technologists) like in the federated model. However, a central enterprise automation team is in charge of "empowering" these entities by providing them with technologies, consulting, training, best practices, support, and by enforcing governance "guardrails" (see figure 4).

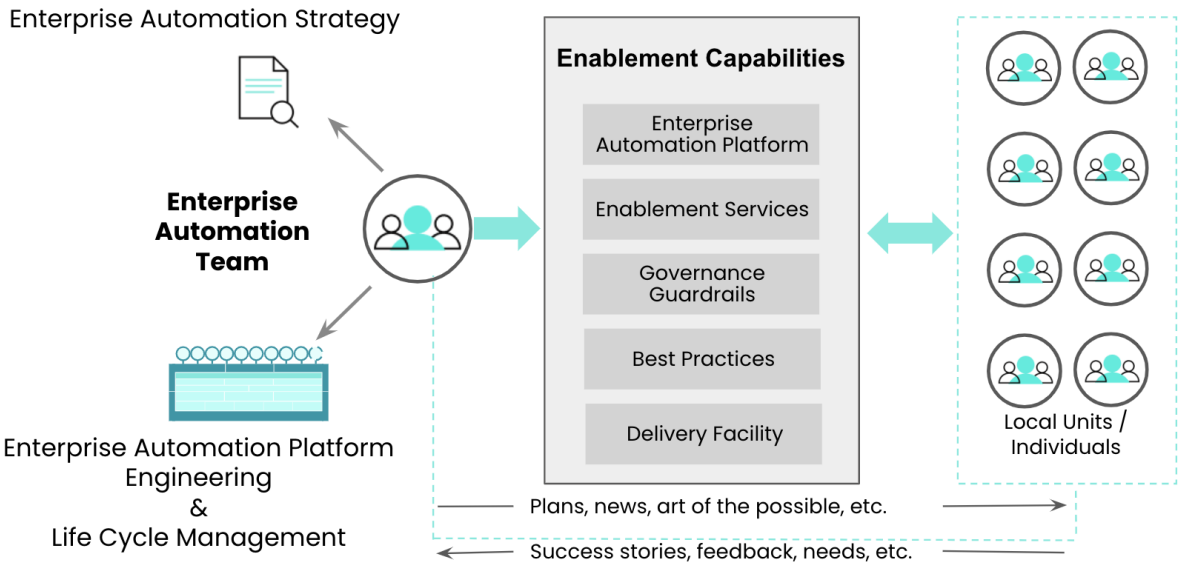

Figure 4 - The Democratized Enterprise Automation Operating Model

Practical experience confirms that, if properly implemented, this model delivers business agility whilst minimizing the risk of compromising security, compliance and QoS and also reducing duplication of technology and efforts. The democratized model has proved also to be effective at supporting business technologists who want to pursue enterprise automation.

Initially, especially in large organizations, iPaaS vendors primarily sponsored the federated model as it was a way to overcome central IT "vetoes" to iPaaS adoption in consideration of the huge investments they made in traditional tools. But in the late 2010s it became increasingly evident to CIOs and IT managers that iPaaS was a technology they could also use to tackle new scenarios, such as SaaS integration, that were hard to address with traditional pre-cloud tools. Consequently, IT departments also discovered how iPaaS technology could improve the productivity of their enterprise automation teams. This realization triggered a virtuous cycle by which iPaaS technology progressively incorporated the sophisticated security, compliance, operations and QoS capabilities that enterprise IT departments vehemently required.

However, as iPaaS usage expanded to constituencies outside the central enterprise automation team, the need for distributed operations and governance became more apparent. Therefore, the most advanced iPaaS offerings in the market now provide a wealth of capabilities (for example, distributed and hierarchical governance technologies and methodologies) to enable the different operating models, in particular the democratized approach, which is the most challenging from a governance perspective.

As organizations move towards the democratized model in their quest for greater efficiency, business agility and pervasive innovation, they will naturally rely on iPaaS to:

- Provide a short learning curve, easy to use, highly-productive toolset that fits with the needs for the different constituencies
- Enable the enterprise automation team to deliver a range of empowerment services and exert centralized control, operations and governance.

Ultimately the trend toward the democratized operating model, is a powerful driver towards iPaaS adoption and market growth.

The iPaaS providers landscape

Given the size and growth rate of the market, a lot of established and start-up companies have jumped on the iPaaS bandwagon. There are now more than 150 iPaaS players, including:

- Large business application providers (e.g., Oracle, SAP, Salesforce),
- Cloud hyperscalers (AWS, Google, Huawei, Microsoft),
- Traditional integration platform vendors (Informatica, Software AG, Talend, Tibco),
- A plethora of pure players (Boomi, Celigo, Digibee, elastic.io, Flowgear, Frends, iCore, iConduct, Lobster Data, Jitterbit, Make, Snaplogic, Tray.io, Workato, Zapier and many others).

However, not all these companies provide capabilities required to meet the full spectrum of iPaaS requirements, which include the product itself, but also the necessary sales, marketing, customer support, and operational capabilities, as well as, in our opinion, the baking of the four trends discussed above.

The 2023 Gartner® Magic Quadrant™ for Integration Platforms as a Service

According to Gartner, "A Gartner Magic Quadrant is a culmination of research in a specific market, giving you a wide-angle view of the relative positions of the market's competitors. By applying a graphical treatment and a uniform set of evaluation criteria, a Magic Quadrant helps you quickly ascertain how well technology providers are executing their stated visions and how well they are performing against Gartner's market view."[4]

4 Gartner Research Methodologies, "Magic Quadrant," 22 March 2023. https://www.gartner.com/en/research/methodologies/magic-quadrants-research

The 2023 Gartner Magic Quadrant for Integration Platform as a Service, Worldwide[5] evaluated 16 iPaaS providers based on their Ability to Execute and Completeness of Vision. The report provides insights into the inclusion criteria, stating that:

"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 March 2022.
- 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 without having to open inbound firewall rules.

Providers must also meet one of the following criteria:

- At least $35 million annual revenue in FY21 from iPaaS subscription licensing sold as stand-alone SKUs
- At least 1,000 unique customer organizations or logos subscribed.

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

- North America
- Latin America
- Europe, Middle East and Africa
- Asia/Pacific, including Japan and China"[5]

5 Gartner, Magic Quadrant for Integration Platform as a Service, Worldwide, Keith Guttridge, Andrew Comes, Saikat Ray, 24 January 2023.

When it comes to the evaluation criteria for the Ability to Execute and Completeness of Vision for a vendor's product or service, Gartner states that:

Ability to Execute: "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."[5]

Completeness of Vision: "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 and templates, hybrid multicloud deployment support, event processing, and metadata management." [5]

When looking at the evaluation criteria for the Market Strategy for Completeness of Vision, the report mentions, "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." [5]

Why we believe this is important

After reading through the Magic Quadrant report, we have a few takeaways:

- We believe that the ability to address the four trends discussed above is very relevant to establish a provider's standing in the market.

- When Gartner mentions that an iPaaS vendor must implement data consistency, multistep processes, and a compositive service, we think this is in line with the "convergence" and "scenario proliferation" trends.
- We believe that platform versatility and support for specialists, ad hoc integrators (that is, developers and administrators), and citizen integrators are in line with the "scenario proliferation" and "extending constituencies" trends.
- From our perspective, the key indicators mentioned in the Market Strategy for Completeness of Vision are in line with the "scenario proliferation," "extending constituencies," and "diversifying operating models" trends.
- In our opinion, the key indicators mentioned in the product evaluation criteria for Completeness of Vision are also aligned with the "scenario proliferation," "extending constituencies," and "diversifying operating models" trends.

How will the iPaaS market evolve?

One legitimate question you may ask yourself is whether providers will continue to innovate or if iPaaS is a "mature" market where technology has reached a steady, slowly-evolving state with vendors primarily concerned about retaining their installed-base. Although software is not "infinitely malleable" (and, ultimately, iPaaS "is" software), we should also remember that many iPaaS offerings have been released only six to ten years ago. Hence, they are approaching maturity, but are still in the evolutionary stage of their lifecycle. Moreover, the cloud delivery model and the native, microservices architecture on which the most modern iPaaS are based, favor fast, yet incremental and non-disruptive, evolution.

Finally, leading iPaaS providers have amassed thousands, if not tens of thousands, of customers. A basic law of sales says it is easier and cheaper to sell more to existing customers than win new ones. Therefore, it is reasonable to assume that iPaaS providers will continue to extend their products' functional footprint to expand their upsell and cross-sell opportunities.

Medium-term iPaaS evolution (2023-2025+)

Over the next three to five years the most successful iPaaS offerings will continue to evolve by adding new capabilities in an incremental fashion. For example, we can expect iPaaS vendors to add human workflow, decision management, and process mining capabilities to better address the most sophisticated process automation use cases. In the not-too distant future, iPaaS offerings will also incorporate event brokering, possibly even event stream processing, to better target event processing use cases.

iPaaS providers have been amongst the pioneers in leveraging machine learning, natural language processing, and chatbots to assist and facilitate enterprise automation process development and operation, but we can expect more to come in this area. For example, via the use of generative AI, an iPaaS will be able to provide recommendations and assistance at the business process level rather than just at the technical level. Generative AI will make it possible to produce enterprise automation processes using natural language interactions. Such an extensive use of AI technologies and techniques will require iPaaS vendors to invest in metadata management technologies, which in turn will favor the platform's ability to "understand" APIs and event schemas with minimal or no human intervention, thus paving the way for "self integrating systems".

From the market perspective, we can expect that iPaaS will continue to "cannibalize" adjacent market segments (e.g., BPM, event brokering/message oriented middleware, ESB, API management, data integration tools) to increasingly morph into a sort of enterprise automation Swiss Army Knife (see figure 5).

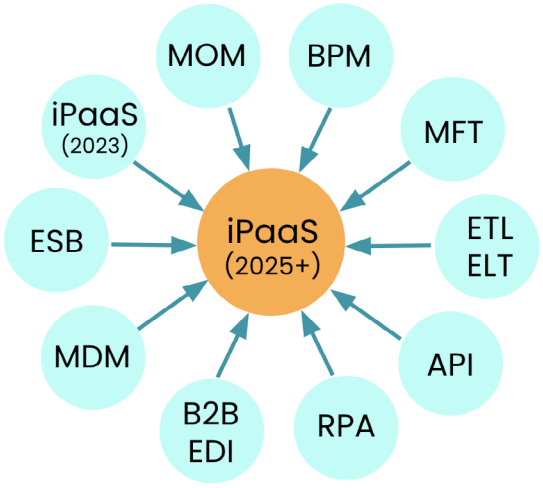

Figure 5 - iPaaS Extending Functional Footprint

This doesn't mean that "specialized" tools like event brokers, API management platforms, or RPA tools will disappear: these products have a large number of customers, which should continue to generate demand for upgrades, extensions, and skills. Moreover, some of these point products will likely remain a good fit for the most challenging and "extreme" requirements, thus contributing to their permanence in the market.

We expect that iPaaS will play an increasingly pivotal role in organizations' enterprise automation strategy in three primary ways:

- iPaaS will be the dominant platform to address cloud-centric and hybrid enterprise automation requirements
- In a growing number of cases, iPaaS will "replace" point products, especially those that are reaching the end of their lifecycle, in a wide range of scenarios.
- iPaaS will act as an orchestration layer that coordinates the activities of multiple point products (for example, an RPA platform, an event-broker, and a B2B gateway) to support complex scenarios. For example, automation of processes that involve not only human and system activities but also devices and robots.

Long-term evolution (2025-2028+)

Over the next five years and beyond, the industry will experience another convergence trend, this time between the enterprise automation and application development disciplines, for which low-code platforms will act as a catalyst.

The reasons for this convergence are quite intuitive:

- Virtually every new application being developed these days must, by design, be integrated with other applications. Therefore application development and enterprise automation are growing inextricably intertwined.
- As enterprise automation focuses more and more on processes that combine human and system activities, the need to develop specific user interfaces for these processes becomes more apparent.

Therefore, the most progressive iPaaS vendors are adding low-code application development capabilities to their offerings either through acquisitions or organic developments. Similarly, some low-code application platform vendors are adding integration functionalities through acquisitions, OEM agreements, or internal developments.

However, there is something much more impactful rapidly emerging, which goes under the name of “composable enterprise” or “composable business”. This has to do with the expectation that a growing number of new applications will not be developed from scratch, but by “composing” pre-existing functional building blocks. For example, several ISVs have already brought so-called “headless” (or “API only”) SaaS applications to market, which provide a rich set of “backend” functionalities that are accessible via APIs and event channels, but don’t necessarily offer their own UX. Therefore, their functionality must be “composed” with those provided by other API-only SaaS applications and/or custom developed and extended with bespoke user interfaces.

From a technology standpoint, this "application composition" approach requires a combination of enterprise automation and low code application development capabilities, which are collectively referred to as an "application composition platform" (see figure 6).

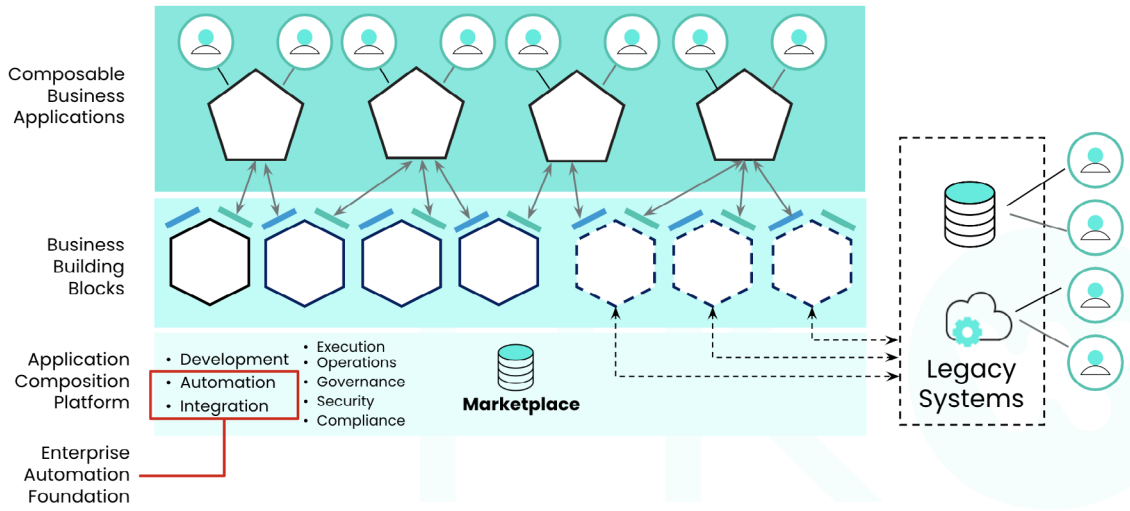

Figure 6 - iPaaS Evolution Toward Application Composition Platform

Long term, iPaaS will likely gradually evolve into an application composition platform by adding low-code application platform features, collaborative development functionality, advanced governance, a reusable components catalog (or marketplace or hub), and a rich portfolio of readily-reusable building blocks.

Vendors could come to the application composition platform in many other ways, but the evolution of iPaaS in this direction is a very concrete (and well underway) possibility.

Action Items

Now that you know where iPaaS came from, where it is today, and where it is heading, you may be asking yourself: How can I best utilize iPaaS at my organization?

If you have never used an iPaaS before, the first step would be to "test the waters" by looking for a couple of enterprise automation scenarios for which an iPaaS could be a good fit. For example, if you are implementing a new SaaS application, an iPaaS could help your team rapidly and cost-effectively integrate this SaaS with other systems. If you want to automate an end-to-end business process, an iPaaS can enable your team to quickly prototype, test, refine, and deploy the process itself.

Once you have a couple of successful scenarios under your belt, you should start to use your iPaaS in more strategic and pivotal ways. Therefore, you should:

- **Adopt iPaaS with a strategic mindset.** If you choose your iPaaS wisely, chances are it will become the cornerstone of your enterprise automation strategy. If you're working at a midsize organization, an iPaaS will likely provide the vast majority of enterprise automation capabilities you need—both now and in the future.
- **Plan for a coexistence with previous generation technologies.** If you're working at a large or global organization, you likely already have a range of previous generation enterprise automation tools (ESB, ETL, BPM) in your portfolio, as well as an API management platform and, possibly, a couple of "tactical" iPaaS in some business teams. In this case, you should strategically plan for a complementary coexistence of the new strategic iPaaS with all these tools, for which the iPaaS could also play an "orchestrator" role.
- **Look for opportunities to replace "legacy" technologies.** Not all the previous generation technologies you have in your portfolio are equally effective and viable. Some of them have been in the market for 25-30 years and were originally designed when there was no cloud, no mobile, no APIs, and no IoT. They are now showing their age and are not suitable to address the modern needs and requirements. Some of these old technologies are even reaching the end of their lifecycle as vendors already announced that they will no longer support them by a certain date. The best way to replace them is often by adopting an iPaaS.

- **Select an iPaaS that can address the four enterprise automation trends.** Many iPaaS providers, including those evaluated in the Gartner Magic Quadrant, have been in the market for years, accumulated thousands of customers, and have been battle tested in hundreds of thousands of real-life scenarios. Each iPaaS has its own sweet and "bitter" spots, but we can assume that they are "good enough" for addressing the most classic scenarios. Though, not all of them are equally good at supporting the new requirements stemming from the integration/automation convergence, the emerging scenarios, business technologist audiences, and the democratized delivery model.

  Hence, when you select an iPaaS, you want to make sure it fits your needs and supports these new requirements. You don't want to end up with an iPaaS that is constrained in terms of its ability to support the emerging scenarios. In particular, you want to be able to provide it to a large set of users with wide-ranging skill sets so that it can support the democratized model. This is where the industry is heading.

1. Gartner®, Market Share Analysis: Integration Software Technologies, Worldwide 2021, Varsha Meta, Fabrizio Biscotti, Harshita Chibber, Sharat Menon, Keith Guttridge, Nicholas Carter, 9 September 2022.
2. Gartner, Charts/graphics created by Workato based on Gartner research Gartner®, Forecast: Enterprise Infrastructure Software, Worldwide, 2021-2027, 1Q23 Update Arunasree Cheparthi, Laurie Wurster, Lisa Unden-Farboud, Daniel O'Connell, Robin Schumacher, Sharat Menon, Amarendra ., Fabrizio Biscotti, Christian Canales, Shailendra Upadhyay, 28 March 2023
3. Gartner, Create Crowdsourcing Communities That Enable Business Technologists to Innovate, Enterprise Architecture Research Team, 3 August 2022.
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