

Next-Gen ADM Solutions

A research report covering the global
Low-code/No-code software vendor landscape

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Executive Summary

Report Author: Ashish Chaturvedi

Shaping the future app development paradigm

The low-code/no-code development market, currently valued at nearly \$15 billion, is expected to quadruple in the next five years. This unprecedented growth is underpinned by an exponential demand for apps in the market, where coder growth is only linear. At the same time, citizen development promises to increase the enterprises' processes, assets and data visibility. Besides, Low-code testing eliminates the need for some of the testing phases required in the case of a standard code. For example, you don't need to conduct unit testing as each app component is pre-built, thereby, reducing the overall time required to test low-code applications.

However, these are not the only reasons behind the phenomenal growth – low-code/no-code development platforms offer quantifiable benefits:

1. The app development time frame is 5-10% of development time with Java or ReactJS
2. The hand coding gets reduced to 5-8% of the coding required for a full-stack development
3. The average cost to develop is 70% less than traditional application development

Not all development can be low code' and 'not all low code can be handled by citizen developers'.

Considering that low-code/no-code would replace full stack development would be unwise. During the study, some unique insights were unravelled.

- First, many low/no code development use cases didn't have an existing equivalent traditional coding use case. For example, many employees in the organization are now converting their spreadsheets to web applications to collaborate and share data quickly.
- Second, most mission-critical custom-facing applications (for example, an e-commerce site) may use some aspects or capabilities of low-code platforms like prebuilt modules but primarily leverages traditional coding languages to build the application.

- Third, the low-code/no-code market is still in its infancy – all low-code and no-code platforms are different in their characteristics and abilities. Some platforms only require business logic and integration skills to develop an application. In contrast, some low-code platforms have their own scripting language and thus require a user to have basic coding knowledge.

The low/no code app has not eaten into the application services pie but increased the size of the pie.



The Lay of the Land

Some recent developments that the market is experiencing include:

- Mobile (and super-apps), cloud-native, AI-assisted development and multi-experience capabilities have become table stakes. A few providers are also playing with the idea of combining their low-code offering with blockchain technology but use cases are limited.
- Many vendors are working on creating reusable packaged components of their existing low-code app platform to further reduce the development effort for common objectives.
- As the low-code/no-code applications see wider adoption, governance and security have become a high priority. However, most leading vendors have adequate checks already built in and are marketing their offerings accordingly.
- The CIO/IT org is actively evolving to enable the rest of the business to build tech solutions more safely – and are adopting new models to support this transformation. We have seen an evolution in IT organizational models to democratize software adoption and development at scale. Many organizations are testing central IT functions with local federated champions to support this trend. Breakdowns at scale are occurring in the way teams use point solutions for different functions.
- The organizational tax of maintaining alignment between teams makes it hard for employees to turn ideas into reality, leaving many disengaged. With the low-code/no-code proposition, employees are more empowered to transform their organizations for the better; they feel more fulfilled and ultimately are more productive – resulting in better employee engagement.

- To benefit from a low-code platform, enterprises need to commit to it for the long-term. In the past couple of years, the low-code application development market has seen a massive boom at the lower end of the no-code/low-code spectrum. Most of them seek quick funding in niche areas and do not have the vision or capability to scale.

Generally during this stage of development, a market consolidates – many players either shut shop or get acquired by their bigger competitors. But with the apps built on different frameworks and technologies, challenges around interoperability, governance, security, and compliance will make it difficult for any vendor to incorporate another vendor offering. In fact, the vendor lock-in is high because till now, the industry has found no way to migrate from one vendor platform to another.

In terms of industry adoption, Consumer Services, BFSI, Manufacturing and Energy seem to be leading the market growth. In terms of regions, the US remains a key market. Interestingly, many companies are skipping Europe and trying to find their next growth market in the Asian economies, especially, China, India, Singapore, Malaysia and Australia.

Consolidation looks natural but the market dynamics won't allow it.



Executive Summary

Guidance

For Enterprises

As Enterprises pursue their digital journeys, ISG believes that adoption of low-code platforms can be an effective measure to match the pace of transformation. While selecting a low-code platform, enterprises should consider the following:

- **Extent of Tooling:** A platform with more comprehensive declarative tooling with attention to a model-driven approach and visual configuration will reduce the coding required to deliver the app
- **Proven platform:** The platform should be able to satisfy several use cases spread across back-office, mid-office and the front-office. Also, it is important to test the versatility of a platform against different application integration scenarios

- **Built-in functionality:** The platform should have built-in functionality that support frameworks and processes for modern application development including agile, DevOps, responsive web design (RWD).

Vendors

ISG believes that enterprises embracing digital are the biggest adopter of Low-code platforms. Thus, the vendors that are present in this market should focus on platforms that enable the development of customer-facing apps. Additionally, as the market is still at a nascent stage, product features and tooling can be a real differentiator. Prioritise the following:

- Building a responsive and large community
- A great app store/marketplace can be a big differentiator

- Growing number of resellers can help you scale faster
- Further AI-assisted development, creation of super-apps, cloud native development should be at the top of your priority list

A no-code development platform with the sophistication and capability of a low-code development platform can be the game changer.





Provider Positioning

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Low-code/No-code Development Platforms

Airtable	Rising Star ★
Appian	Leader
Betty Blocks	Product Challenger
BizHub	Contender
Caspio	Contender
Claris	Product Challenger
Genexus	Rising Star ★
Kintone	Contender
Kissflow	Product Challenger
Mendix	Leader

Low-code/No-code Development Platforms

Microsoft	Leader
Nintex	Contender
Oracle	Leader
OutSystems	Leader
Pega	Market Challenger
Salesforce	Leader
SAP	Market Challenger
ServiceNow	Market Challenger
UiPath	Leader
Zoho	Leader



This study focuses on leading vendors and recent developments in the low-code/no-code application development market.

Simplified Illustration Source: ISG 2022

Low-code/No-code Development Platforms

Definition

Low-code/no-code development platforms allow applications to be configured through tools that enable drag-and-drop composition with minimal or no coding. In the initial days, circa 2015, low-code/no-code development was positioned as a panacea for businesses that could not afford huge costs associated with tech talent or wanted to get a new application to work with their existing legacy applications without tweaking anything in their current systems.

Over the past five years, the low-code/no-code ecosystem has evolved in terms of functionalities, and the number of use cases has exponentially increased. Low-code/no-code is being adopted by forward-looking, innovation-driven, highly sophisticated enterprises. Therefore, the focus has shifted from the type of organization that should consider

deploying low-code/no-code platforms to how low-code/no-code platforms can coexist with traditional development and their respective use cases.

ISG has observed an increase in the demand for rapidly adaptable, customer-facing systems of engagement, which implies that a growing percentage of enterprises and providers will adopt low-code/no-code platforms and innovate using them.

The two primary benefits of low-code/no-code development platforms are business agility and implementation simplicity. Low-code/no-code development is up to four times faster than traditional development, which can reduce the application development time from months and weeks to days and hours. Furthermore, after basic training, business users can configure low-code/no-code applications, which can reduce the dependency on technical and IT workforces.



There are several secondary benefits of low-code/no-code development platforms, such as their innate ability to work with legacy IT infrastructure, decrease development, testing and maintenance costs and better cross-team collaboration.

Scope of the Report

In this ISG Provider Lens™ quadrant study on Next-gen ADM Solutions, ISG has included a single quadrant on Low-code/No-code development platforms.

This ISG Provider Lens™ study will offer IT decision-makers:

- Transparency into the strengths and weaknesses of relevant software vendors
- Guidance on scenario-based vendor selection
- Outlook on the low-code/no-code market

ISG studies serve as an essential decision-making basis for building key relationships and go-to-market considerations. ISG advisors and enterprise clients use information from these reports to evaluate the current vendor landscape for potential new engagements.

Provider Classifications

The provider position reflects the suitability of software vendors for a defined market segment (Low-code/No-code development platforms). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either

considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

Midmarket: Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

Large Accounts: Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).





Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

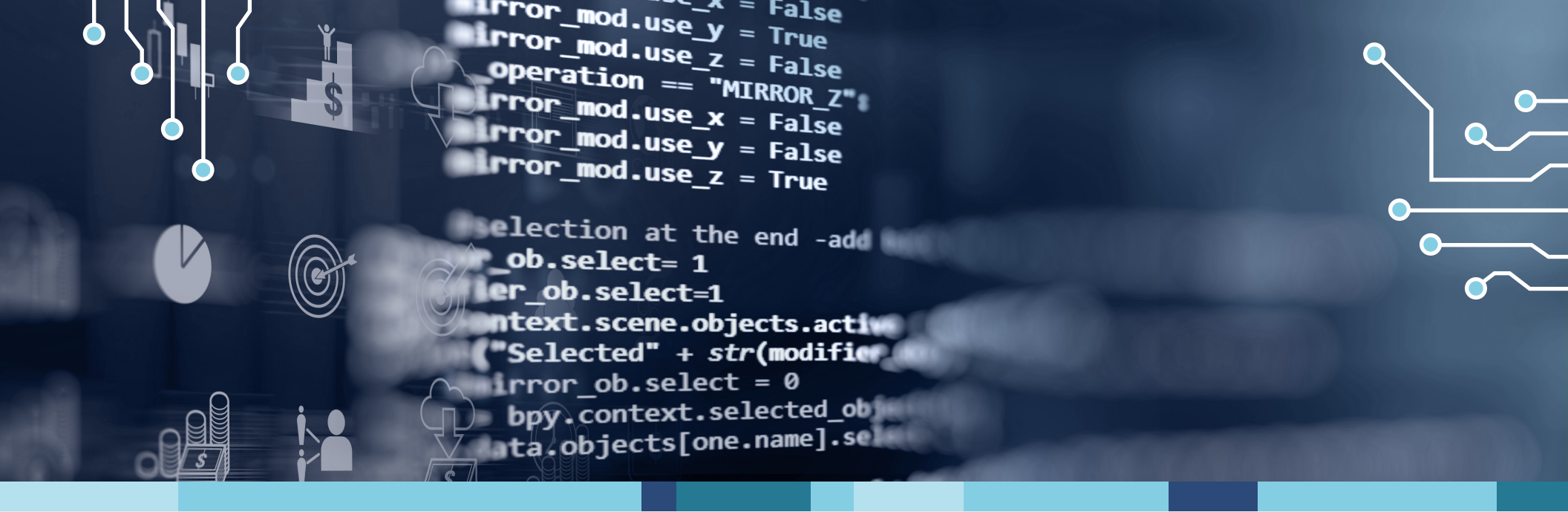
Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.





Low-code/No-code Development Platforms

Low-code/No-code Development Platforms

Who Should Read This

This report is relevant to enterprises across industries for evaluating vendors offering Low-code/No-code platforms and how they address the key challenges enterprise clients face today.

Exponential growth in business applications or processes is overburdening IT departments across enterprises and driving the adoption of LC/NC platforms across almost all industry verticals. For obvious reasons, not all app development can be moved to LC/NC. Still, wherever it is possible to employ LC/NC, it can lead to lower cost, reduce time-to-market and lower coding complexity. LC/NC platform adoption is also helping enterprises to eliminate the silos created by business functions in an enterprise.

While selecting LC/NC platforms enterprises should consider several aspects, such as data governance, security, data management, application management, and data migration. In most cases, different platforms are using different scripts and data formats, creating another major issue for end-users when it comes to migrating from one platform to another, creating a vendor lock-in. Enterprises should also consider a platform vendors' ability to provide reusable and customizable tools, support applications across the enterprise, and provide capable frameworks. Ability to create communities, marketplaces, and distribution channels such as reseller or partners, along with capability of digital technology-assisted development will further ensure vendors' success in this market.



IT and technology leaders should read this report for a clear understanding of LC/NC vendors' strengths and weaknesses and how these capabilities can be integrated into existing IT infrastructure, along with new digital technologies, to find a competitive edge in the market.

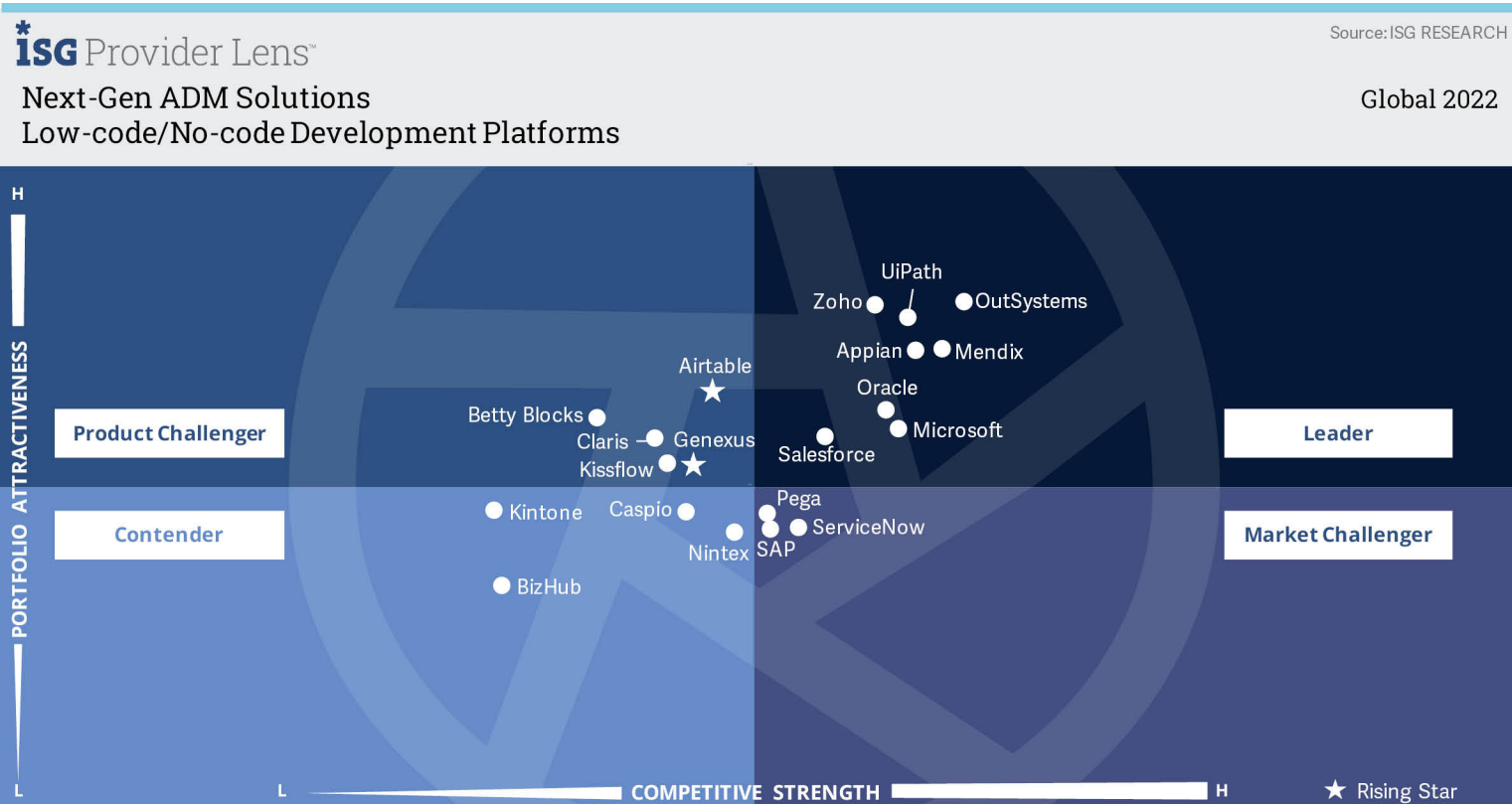


Line-of-business and industry leaders should read this report to understand the relative positioning of available LC/NC vendors. These can be leveraged to bring down the functional silos and increase visibility and automation while creating higher business value and returns on investment.



Business process leaders/managers (mid-level) should read this report to understand the functionalities that can be introduced with the implementation of LC/NC and to reduce the over-reliance on IT department.





This quadrant assesses global software vendors offering **low-code/no-code** application development platforms. **Solving the slow and cumbersome** application development process binds all these vendors.

Ashish Chaturvedi



Low-code/No-code Development Platforms

Definition

This quadrant assesses global software vendors offering low-code/no-code application development platforms. Currently, there are three categories of platform players existing in the market:

The first category is low-code vendors that offer development platforms requiring considerably less coding than full-stack development. Professional developers are the primary targets, where the underlying proposition is faster development, deployment and provisioning of applications.

The second category is no-code vendors offering development platforms that can configure applications based on business logic and pre-built drag-and-drop options. Citizen developers are the primary targets, where the underlying proposition is the

simplicity of usage and the innate ability to provision applications without coding knowledge.

The third category of vendors offer a complete solution suite that includes both low-code and no-code offerings.

A low-code/no-code development platform uses a graphical user interface to set up, deliver and deploy applications. The following attributes mainly define a low-code/no-code development platform:

Use of visual models to determine application and process logic, data models and user interfaces

Presence of an app store populated with widgets, templates, plug-ins and APIs

Capabilities such as social collaboration, full deployment, mobile and web development, project management,

application monitoring and end-user feedback loops to support the entire application delivery lifecycle

Built-in automated testing (performance testing), one-click deployment of apps and autoscaling capabilities to meet non-linear user demand



Low-code/No-code Development Platforms

Eligibility Criteria

The platform vendors will be evaluated based on:

1. **Number**, usability, and customization of drag-and-drop options
2. **Quality** of the user interface and integrated development environment
3. **Integration** with third-party applications
4. **The simplicity of deploying apps**, for example, single-click deployment, ability to work in the offline mode and browser-agnostic designs
5. **Hosting options**, underlying architecture, app security and scalability
6. **Price options** (enterprise, business, individual and others), ROI, exit cost and price competitiveness
7. **Training modules and overall quality** of the training program
8. **Market presence** in terms of the number of live users and client implementations, partnerships, brand awareness, geographic reach and financial growth
9. **Variety** of use cases
10. **The versatility** of the platform to cater to business users that strive for no-code, logic-based applications and to coders that look to develop complex applications by writing a short piece of code



Low-code/No-code Development Platforms

Observations

From the 28 companies assessed, 20 have qualified for this quadrant with eight Leaders and two Rising Stars.

Majority of these vendor platforms existed before the term low-code and/or no-code came into existence, maybe not as sophisticated as their current versions. Essentially, most of these vendors entered the market to solve the problem of slow and cumbersome application development process. If we discount this common purpose that binds all these vendors, they are fundamentally different in their approach, go-to-market and target segments. The below enunciates the lay of the land:

- Some vendors cater to only professional developers, some cater to only citizen developers, whereas a third category of vendors formulate offerings for both professional and citizen developers.

- Vendors like UiPath or Zoho that had offerings in adjacent areas emphasize on the overall value proposition of their product suite. Whereas vendors like Microsoft and Salesforce with global market-leading offerings, showcase their low-code/no-code offering as an extension of their already proven solutions. Then, there is a third category of pureplay specialist low-code vendors like Appian, Mendix and OutSystems that position themselves as pioneers and trailblazers in this space.

- Players also differ in the areas they focus on – backend v/s front-end applications v/s both, process management v/s collaboration v/s both, simple platform with a clean UI v/s sophisticated platform with endless customizations.

Net/net, market is in such early stages that it's hard to define the future complexion and end-state of the market.

appian

Appian is a leading specialist vendor that has made tremendous progress in the past 1 year and is currently focusing on partner marketing and community building. Appian boasts of a high-grade architecture, AI-powered application design and a robust partners and tool ecosystem.

Mendix

Mendix has a state-of-the-art low-code platform with best-in-class features, equally caters to the needs of both citizen developers and professional coders. The vendor has use cases spread across various industries. After being acquired by Siemens, Mendix's penetration in the Asian region and Manufacturing industry has significantly risen.

Microsoft

Microsoft has one of the most ubiquitous apps presence in the market and its low-code offering, Power Apps, significantly gets benefitted from this scenario. Power Apps is equally beneficial for the functional and technical workforce in an organization.

Oracle

Oracle APEX has been around since 2004. It is a highly scalable solution with multiple deployment options. It's wide usage and great user feedback speak volumes of its capabilities. However, it's most useful for the technical workforce.



Low-code/No-code Development Platforms

OutSystems

OutSystems is industry leader with deep focus on DevSecOps, R&D, AI/ML, innovation and vertical expertise. It has partnerships with multiple top institutions and SIs, along with a large reseller network. The company has experienced huge revenue growth in the past 3 years.

Salesforce

Salesforce Low-code product ethos is ingrained in most Salesforce products and Salesforce Platform (its low-code offering) is an extension of this philosophy. It is backed by Salesforce's loyal community, large app store and seamless integration capabilities.



UiPath focuses on achieving automation in development through its platform. Other talking points include growth via acquisitions (3 acquisition since 2019), investments in new geographies (China and LATAM), focus on both industry verticals and prebuilt solutions, 30% of revenue put back into R&D.

Zoho

Zoho's excels in trainings (marketing via education), capabilities to produce industry specific and pre-built solutions, huge geographic presence, fair amount of enterprise clients and multi-product tools portfolio.

Airtable

Airtable is a no-code provider that takes pride in user stickiness through a seamless experience, high-grade synchronization capabilities (both internal and with third parties) and easy to understand functionalities.

GeneXus

GeneXus is expected to grow its presence in new regions like Eastern Europe and India after being acquired by Globant. The 33-year-old GeneXus continues to operate separately and offer a capable low-code platform.



UiPath



"UiPath Apps is a top choice for customers looking to rapidly develop automation-powered applications."

Ashish Chaturvedi

Overview

UiPath Apps is a low-code offering, to create customized UX-focused applications. UiPath Apps is an integral part of the company's overall automation suite. UiPath Apps offers reusable templates, RPA automation workflows, API integration service, data modeling and storage, automation testing and a comprehensive app store via UiPath Marketplace and Automation Hub. UiPath's 4000 employees serve more than 10,000 enterprise customers worldwide including Amazon, Google, Uber, Coca-Cola, Spotify and Morgan Stanley.

Strengths

The Unified platform value proposition:

Multiple elements of UiPath's low-code automation suite complement each other to form a formidable offering, such as 'Automation Ops' for developer governance, 'Studio family' for collaborative multi-persona development, and 'Automation Hub and Marketplace' for composing and sharing of applications. Moreover, automation permeates every facet of application development, allowing both professional and citizen developers to automate tasks through bots and digital assistants.

Community and partner ecosystem:

UiPath has one of the largest low-code

automation communities in the world with over 2 million members. This community is complemented by a global network of 5600 delivery and technology partners. This ecosystem enables and supports enterprises for rapid development of automation-powered apps.

Comprehensive feature set: The UiPath platform contains all the essential components of a full-fledged low-code platform including App/UX Design, RPA/automation workflows, API integration, data modeling and management, AI and MLOps, intelligent document processing, process and task mining, analytics, DevSecOps, and software development lifecycle management.

Caution

Automation remains the key selling point: UiPath's low-code apps offering is an extension of its already successful and proven automation suite. Therefore, enterprises seeking transformation through automation are better suited to opt for UiPath Apps to realize its actual value.





Appendix

Methodology & Team

The ISG Provider Lens™ 2022 – Next-Gen ADM Solutions research study analyzes the relevant software vendors/service providers in the Global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of September 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars (\$US) unless noted.

The study was divided into the following steps:

1. Definition of Next-Gen ADM Solutions market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
 - * Strategy & vision
 - * Tech Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * CX and Recommendation



Author & Editor Biographies

Author



Ashish Chaturvedi
Principal Analyst

Ashish Chaturvedi brings more than 12 years of experience spanning digital advisory, IT sourcing, technology and industry research. He is a digital expert at ISG, responsible for authoring thought leadership papers and ISG Provider Lens™ reports around applications and enterprise retail. Ashish's remit includes advising senior executives on digital strategy, product planning, emerging tech, and IT procurement. He is also responsible to oversee, manage and further grow ISG Provider Lens™ Custom Research business.

Ashish has authored 60+ research reports in the realm of retail technologies, digital benchmarking, enterprise applications, analytics, and IT outsourcing. Ashish is also a member of the IDG influencer network (cio.com).

*Enterprise Context
and Overview Analyst*



Maharshi Pandya
Research Specialist

Maharshi Pandya is a Research Specialist at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Next-Gen ADM Solution & Services, SAP HANA Ecosystem and Analytics Services and Solutions. He supports the lead analysts in the research process and authors the global summary report. Maharshi also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments as well. Prior to this role, he has been associated with

several syndicated and custom market research firms, in which he has worked on both, secondary and primary interaction centric research projects around market sizing and forecasting, competitive benchmarking, pricing analysis vendor profiles and market share analysis for several industry verticals such as information and communication technology, media and information services, and automotive. His area of expertise includes analytics, application development and maintenance, and enterprise resource planning.



Author & Editor Biographies



IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a partner and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



About Our Company & Research

***ISG** Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

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