ISG Provider Lens™

Next-Gen ADM Solutions

Democratizing application development:
Low-code and no-code development platforms

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Over the years, there have been many advancements in application development, from building basic services for enterprises to delivering applications using digital technologies. Optimizing processes and costs has been a constant focus for enterprises and is embedded in building and delivering applications. However, in the past 3–5 years, the focus has shifted toward low-code and no-code development platforms (LC/NCDPs), helping users to configure the applications required for specific business needs. These platforms are built to be user-friendly, enabling even a user without a software development background to configure and develop applications. They also allow drag-and-drop configuration, requiring minimal to zero coding expertise. As a result, over the last 2–3 years, these platforms' user base and adoption have increased multifold.

In this study, ISG assesses the platform vendors in the application development segment that provide LCNC capabilities to make the independent development of applications simpler for clients with minimal interference from developers. The two primary benefits of these platforms are business agility and implementation simplicity. The secondary benefits are the innate ability to work with legacy IT infrastructure and decreased development, testing and maintenance costs. ISG assesses the vendors across multiple industries and functional areas, such as process engineering, business intelligence, product development and R&D. The increase in LC/NC platform adoption indicates the changing nature of application development approaches. It reflects the emphasis on reducing the time professional or citizen developers require to optimize operations at lower costs.

Next-Gen ADM Solutions 2024 focusing on **LC/NC application** development for professional and citizen developers

Low-code Development Platforms (LCDP)

No-code Development Platforms (NCDP)

Simplified Illustration Source: ISG 2024

This ISG Provider Lens™ Next-Gen ADM Solutions 2024 study offers the following to IT decision-makers:

- Transparency into the strengths and weaknesses of relevant software vendors

- Guidance on scenario-based vendor selection

- Outlook on the LC/NC 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.

Low-code Development Platforms (LCDP)

Definition

The low-code development platforms (LCDP) quadrant assesses global LC software vendors across the industry. These vendors offer application development platforms that use interfaces with drag-and-drop functionalities with minimal coding requirements to build functional modules and work as full-fledged applications, providing benefits and tangible business impact for the users.

LC platform vendors offer development platforms that require considerably less coding than full-stack development. Professional developers are the primary targets, with the underlying proposition of faster application development, deployment and provisioning. The vendors also offer guidance and training for professional developers to provision, develop and deploy full-stack or small-scale applications and manage the application services.

Vendors offer platforms that support on-premises or cloud-based applications, including using visual models to determine application and process logic. The availability of an app store with widgets, templates, plug-ins and APIs provides the flexibility to add new functionalities to the existing application. Vendors are assessed on the support provided for the application delivery lifecycle, including built-in testing and auto-scaling capabilities to drive business growth.

These platforms serve multiple use cases, complementing core software development. Vendors in this quadrant provide training for platform use, offer technical support to integrate newly built applications into existing landscape and enable clients to build applications tailored to their specific business requirements.

Eligibility Criteria

The platform vendors will be evaluated based on the following:

1. **Ease of use** of interface and integrated development environment

2. Integration with third-party applications

3. Hosting options, **architecture, application security** and scalability

4. **Training modules** to help train professional developers to use the platform

5. Market presence in terms of the number of **live users and client implementations**, partnerships, brand awareness, geographic reach and financial growth

6. The versatility of the platform to cater to coders aiming to develop complex applications with minimal code

No-code Development Platforms (NCDP)

Definition

The no-code development platforms (NCDP) quadrant assesses global software vendors offering application development platforms featuring drag-and-drop interfaces to build business-specific applications, emphasizing ease of use. These platforms, targeting citizen developers, offer configurable applications based on business logic and pre-built drag-and-drop options. The underlying proposition lies in their simplicity, enabling users to provision applications without coding knowledge, leveraging their understanding of business requirements.

While using these NC development tools, no visible coding is evident. Instead, the platform leverages data abstraction and encapsulation to conceal user actions' intricacies. This functionality enables users to achieve their goals effortlessly by simply dragging and dropping application components. Applications developed using NC platforms encompass multiple functionalities, including back-office applications, web applications for restaurant reservations, workflow management, business process automation and HR functions.

To develop these functionalities, the no-code development platforms offer functionalities such as ready-to-build templates, ability to include relevant libraries, ability to connect to multiple systems and enable mobile access to the application.

Vendors in this quadrant offer training modules to help business developers use the platform and build applications effectively. Security and governance are embedded into the platform, guiding users to build compliant applications. Effective data management and governance are important aspects. Vendors excelling in these areas are considered to have a competitive advantage over others.

Eligibility Criteria

The platform vendors will be evaluated based on the following:

1. **Number, usability and customization** of drag-and-drop options

2. **Ease of use** of interface and integrated development environment

3. **Application security** and scalability with existing IT landscape

4. **Price options** (enterprise, business, individual and others), ROI calculation support, low exit cost and price competitiveness

5. Training modules and overall quality of the **training program**

6. Existing clients with several **live users and client implementations**

7. Partnerships with hyperscalers, brand awareness, geographic reach and financial growth

8. The versatility of the platform to cater to business users that strive for **NC, logic-based applications**

Quadrants by Regions

As part of this ISG Provider Lens™ quadrant study, we are introducing the following Two quadrants on Next-Gen ADM Solutions 2024:

Quadrant	Global
Low-code Development Platforms (LCDP)	✔
No-code Development Platforms (NCDP)	✔

The survey, evaluation, analysis and validation will occur during the research phase between April and June 2024. The results released will be presented to the media in October 2024.

Milestones	Beginning	End
Survey Launch	March 28, 2024	
Survey Phase	March 28, 2024	April 24, 2024
Sneak Previews	August 2024	
Press Release & Publication	October 2024	

Please refer to the link to view/download the ISG Provider Lens™ 2024 research agenda

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of "Voice of the Customer." The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
ISG.star@isg-one.com

ISG Star of Excellence

The ISG Provider Lens 2024 – 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 March 2024, 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.

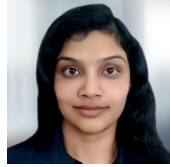All revenue references are in U.S. dollars ($US) unless noted.

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ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,

- Advise on service provider inclusion, participate in briefing calls,

- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study

Jeff
Orr

Director

Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

Agilepoint	Blue Prism	HCL	Netcall
Agile Labs	BRYTER	HCL Domino	Neutrinos
Airtable*	Bubble	Huawei (Astro Zero)	Newgen Software
Alibaba (YiDA)	Caspio*	Hyland	Nintex*
Alpha Anywhere	Claris FileMaker*	Joget	OpenText AppWorks
AppGyver (SAP)*	Comidor	Jotform	Oracle*
Appian*	Creatio	Kintone*	OutSystems*
Appmaster.io	DefineSys	Kissflow*	Pega*
Appollo Systems	DronaHQ	Kuali Build	PhixFlow
Appy Pie	DWkit	Mendix Technology BV*	Pillir
AuraQuantic	Freshworks Neo	Microsoft*	ProntoForms
Automation Anywhere	Genexus*	Mingdao	Qalcwise
AWS Honeycode	GEP	MobileFrame	Quickbase
Betty Blocks*	Glide Apps	Monday.com	Quixy
Bizagi	Google AppSheet	Neptune Software	Retool

Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

Robocoder Rintagi

Salesforce*

Scopeland Technology

ServiceNow*

SIB Visions VisionX

Simplicity Software

Skuid

Skyve*

Strikingly

The m-Power Development Platform

Thinkwise

Trackvia

UI Bakery

UiPath*

Unqork

Vantiq

Visual LANSA

Voiceflow

Wavemaker

web.com

WEBCON

WebRatio

WEM

Zapier

Zoho*

Zudy Vinyl

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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ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

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