

# Magic Quadrant for Enterprise Architecture Tools

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EA tools help envision, model and plan for the future of the enterprise, offering features to continuously evolve business, operating and technology models. Heads of enterprise architecture should select EA tools that support long-term transformation, modernization and innovation goals.

## Market Definition/Description

Gartner defines the market for enterprise architecture (EA) tools as tools that allow users to capture the interrelationships and interdependencies within and across the ecosystem of partners, operating models, capabilities, people, processes, information, applications and technologies. EA tools provide a central repository to capture data and metadata about artifacts that describe the enterprise. Models can be built to represent the relationships between these artifacts that help describe and shape the future of the enterprise. Through modeling features, EA tools enable scenario analysis of trends and disruptions and other drivers of enterprise change, to deliver realistic roadmaps.

EA tools provide a means to model the business and IT aspects of the enterprise in support of business outcome delivery. Doing so requires the collaboration of multiple stakeholders across the organization, with each playing a different role at a different time. The models and methods used by the stakeholders will vary depending on their role, and must be integrated and connected to other models to be useful.

To support these needs, EA tools have three aspects. The first aspect is the metamodel of the enterprise, reflecting the taxonomy and ontology of all elements (artifacts) that make up an enterprise, including their characteristics and relationships. The second aspect is the

modeling environment, along with a supporting repository that reflects the instantiation of the metamodel. The third aspect is the facilitation of collaboration between a diverse group of stakeholders across the organization, right from business strategy to IT.

A broad array of architecture and IT disciplines, such as business, information, solution, security, applications and infrastructure use EA tools. EA tools operate at many levels and across a wide spectrum to enable insights and support informed decision making. With such a broad array of stakeholders, EA tools must also facilitate the consumption of, and contribution to, the information contained within the repository. As they undertake their work, these users switch between an ever-expanding set of views and visual representations of the datasets contained in the repository.

EA tools are metatools that require integration with a variety of enterprise systems, like configuration management databases (CMDBs), planning tools, financial management tools, and business process management tools, to access and aggregate artifact data into meaningful insights. As such, EA tools' success is highly dependent on data access, data quality and data governance of all systems it integrates with.

## Mandatory Features

- **Repository:** Provides a single source of truth for the organization with storage, categorization and versioning of objects, models and artifacts of various sorts, as well as the relationships between them, and related business artifacts and views.
- **Modeling:** Structures relationships across entities, such as business strategies, objectives, goals, constraints, capabilities, personas, customer journeys, activities, processes, value streams, policies, decision models, metrics, applications, technologies, roadmaps, projects and programs.
- **Presentation:** Displays and illustrations of information in the form of dashboards, heat maps, models and scenarios that contribute to the presentation capability of the tool. A variety of visual presentations helps colleagues understand and assess the impacts associated with decisions and proposed solutions.
- **Analysis:** Identify, assess, prioritize and track gaps, challenges, opportunities and risks within and across portfolios of business capabilities, investments, processes, projects, applications and technologies.

- **Configuration and management:** Setup and administration features to support the EA tool's security, along with setting up different user experiences based on persona, their access rights and feature alignment including controlling access to information stored in the repository.
- **Publication:** Enables wide consumption of the data contained within the EA tool across the enterprise and beyond. Tools should also be able to capture comments and feedback on that content, and/or score elements contained in repository views.
- **Integration:** Expose and import data to and from other products, enabling the EA tool to be a hub uniting other common tools in the enterprise technology ecosystem. This includes categories such as product management, CMDB, business process management suite (BPMS), process mining and enterprise agile planning tools.
- **Extensibility:** Extend the metamodel of the EA tool through the definition of new modeling concepts and relationship types — up to new graphical representations and enforcing domain-specific rules.

## Common Features

- **Innovation and sustainability management:** Mechanisms that support the creation and tracking of innovation and change initiatives. This includes support for ideation, trendspotting and the engagement of colleagues, enterprise agile planning tools links and benefits realization. EA practitioners need to help organizations track and leverage emerging trends, technologies and sustainability advances through structured, flexible and iterative methods.
- **Intelligent automation:** AI-assisted and automated features that help EA practitioners industrialize their activities, outputs and decisions, delivering value more quickly and reliably, while keeping information up to date. These features should focus on process and policy automation functionality used within the tool (rather than served up externally).
- **Frameworks:** Starting point for structuring the repository and the relationships among artifacts, focusing on support for different architectural methods and vertical industry models. This includes support in choosing the EA frameworks to adopt and identify overlaps and gaps.

- **Augmented architecture development:** Generative AI (GenAI) and AI-assisted development of architecture assets, whether in textual or graphical form or both, which includes, but is not limited to business architecture and data architecture designs, domain reference and solution architecture designs, technology reference models and roadmaps.
- **AI assistant:** Conversation AI tooling that can support real-time user queries, assist in identifying artifacts and relationships, propose and build new models, and set up user and stakeholder reminders for enterprise architecture management (EAM) tasks.

## Magic Quadrant

Figure 1: Magic Quadrant for Enterprise Architecture Tools





**Gartner.**

## Vendor Strengths and Cautions

### Ardoq

Ardoq is a Leader in this Magic Quadrant. Ardoq's product functionality is delivered as a cloud-native SaaS solution. Its main operations and presence are in Europe, with sustained growth in North America. Ardoq supports clients across the financial services, public sector and manufacturing industries. Its future plans include federated architecture access control, analytics across multiple solutions to support investment decisions, AI-based extraction of model items from unstructured information and building a lightweight process modeling capability into the tool.

Ardoq acquired ShiftX in September 2024, during the research period for this MQ, and the acquisition has not been included in the evaluation.

Ardoq and Celonis announced the launch of a joint solution in September 2024, during the research period for this MQ, and this joint solution has not been included in the evaluation.

### *Strengths*

- **Intuitive exploration for non-EA users:** Ardoq continues to augment its supplemental Discover and Broadcasts features to increase stakeholder engagement, while enhancing EA's ability to gather information. Ardoq's Discover allows non-EA users to explore and download predefined views within the tool. Discover also allows the publishing of reports and dashboards directly to non-EA users for consumption and navigation. Ardoq Broadcasts uses graph queries to understand connections between architecture components and people, and provides automated change notifications to affected users, who then get contextualized views of the impact(s).
- **Broad metamodel customization:** Because each workspace has its own unique metamodel, taxonomies or ontologies can be built and configured to local requirements. Users can extend the metamodel via drag-and-drop to modify component types and hierarchies, reference types, properties, and notation visual styles. The metamodel is developed and deployed in an evolutionary manner, delivering just enough structure to meet the use case need at hand.
- **Notable and sustained growth:** Ardoq has maintained strong revenue growth for several years, and has seen a significant increase in its number of customers. During recent growth, full-time employee headcount has remained steady, due to an organizational restructuring to provide enhanced focus.

### *Cautions*

- **Wide cost range:** Ardoq has a straightforward pricing structure, which is categorized based on overall employee headcount. While Ardoq's base package provides companywide access to many product features — that deliver one or more use cases end-to-end — engagement broadening and advanced analysis features are premium add-ons. To fully leverage Ardoq's engagement and insight features, clients will pay a fixed rate for add-ons such as Broadcasts, Scenarios, a sandbox environment and REST APIs, and pay for additional Discover users based on user volume.

- **No manual diagramming support:** Ardoq intentionally brands itself as a “new-gen” EA tool, combining data visualization and modeling. Those looking to diagram manually will find no embedded features. Users that need to manually draw, diagram, or model must rely on third-party tools.
- **Limited regional focus:** Ardoq continues to focus its main marketing and sales in Europe and North America. It relies on partners for growth in other regions. Prospective customers outside the vendor’s main regions should verify its local partner capabilities, as well as its partner positioning to process local requirements, including regulations.

## Avolution

Avolution is a Leader in this Magic Quadrant. Its ABACUS product is delivered as a fully hosted SaaS solution, on-premises or as a hybrid cloud offering. It has customers in several industries, including banking and securities, insurance, utilities, manufacturing, and natural resources. Its operations are spread across EMEA, North and Latin America, and the Asia/Pacific region. Its future plans include AI recommendations for accelerating a diagramming and administrator dashboard with improved analytics, traceability and insights, and finding and maintaining information quickly across federated architectures.

### *Strengths*

- **Support for customers of varied maturity across regions and industries:** While less mature organizations can leverage Avolution’s Rapid Start Program with embedded frameworks and libraries, mature organizations benefit from support to automate analysis of models in the repository with metrics aggregation and rapid scenario planning. The vendor hosts regional events and supports 13 hosting locations distributed across North and Latin America, EMEA, and Asia/Pacific. Its industry accelerator packages provide faster speed to value for industry-specific contexts.
- **Support for a broad range of architecture personas:** Avolution targets its features at the key architecture personas driving business and IT transformation, including heads of EA, EAs, and business, information and data, technology, cloud and security architects, to name a few. Plans include continued commitment to supporting documentation and communication of cloud and security architectures aligned to Azure and Google libraries and NIST cybersecurity standards.
- **AI/ML-enhanced user experience:** Integration with Microsoft Copilot and use of no-code algorithms enable business and nontechnical users to quickly build analytics for a variety

of architecture questions. Machine learning (ML) capabilities help improve repository data completeness, consistency and quality, including the ability to suggest strategies and detect data anomalies that may require attention.

### *Cautions*

- **Unclear pricing across product tiers:** Although Avolution has simplified its product offering by removing its a la carte model and instead offering three levels (stand-alone, essentials and premium), its lack of pricing transparency could make it challenging for clients to consider the product from a cost-benefit perspective.
- **Product strategy and innovation lack clarity:** Although Avolution continues to dedicate resources to innovate and advance its product, it is unclear how these investments translate into tangible year-over-year changes in new product features and performance improvement that differentiates it.
- **Operational responsiveness:** Limited in-house professional services and support — considering the size of its client base — may result in a slower-than-expected response to client requests. This could impact responsiveness and delay tool issue resolution, potentially impacting clients' EA tool projects and decision making.

### **Bee360**

Bee360 is a Niche Player in this Magic Quadrant. Its primary EA product is called Bee360 and is available in on-premises, hosted or private cloud versions. Bee360 has its central operations in EMEA and a service center in the APAC region. Bee360 continues to focus on targeting CxO personas, regardless of industry. Its future plans include colorful capability maps with tagging, survey functionality for external users and more configurable interface visualization.

### *Strengths*

- **Pragmatic IT management focus:** Bee360 positions its product to support “holistic IT management,” which aims to create a uniform view of management areas, including strategic portfolio management, EA management and IT financial management. Bee360 focused on the “execution” part of the strategy-to-execution chain, thus ensuring EA strategy materializes well through architectural development.
- **Collaborative license option:** Bee360's enterprise license option allows a broad audience tool access without restrictive or exclusive user rights. It encourages the exploration of

user-generated initiative and financial insights to a diverse range of stakeholders.

- **Targeted CxO approach:** Bee360 continues its marketing focus to understand and meet C-suite goals and targets. This top-down approach targets decision makers — who have the budget and mandate — to motivate non-EA stakeholders to use Bee360 to drive business outcomes.

### *Cautions*

- **Focuses more on traditional EA roles:** While Bee360 encourages non-EA users to leverage insights from the tool, it still places a heavy focus on traditional EA roles as its primary contributors. With EA roles and functions evolving across organizations, complementary IT and business personas are emerging as necessary contributors to an EA tool. Potential customers should ensure their stakeholders' ability to contribute to the tool is sufficient.
- **Limited built-in support for industry frameworks:** Bee360 primarily encourages the adoption of its BeeCore model and does not offer comprehensive out-of-the-box (OOTB) support for industry, software or compliance frameworks — with the exception of SaFe and C4. Users can still integrate or leverage industry frameworks, but they are not directly embedded. Bee360 continues to rely on individual account manager experience and its partner capabilities to address industry demands.
- **Unclear innovation strategy:** The ability of Bee360 to consistently deliver greater innovation is unclear. Bee360's innovation focus hinges on identifying customer challenges and addressing them in unique ways. But with a small customer base — relative to its peers — this strategy may not yield sufficient opportunities in the near term.

### **Bizzdesign**

Bizzdesign is a Leader in this Magic Quadrant. The Bizzdesign product Horizzon is delivered as a fully hosted SaaS solution, on-premises or as a hybrid configuration. Its main presence is in EMEA and North America, and is growing in the Asia/Pacific region. Bizzdesign supports a broad range of industries, including financial services, the public sector and defense, manufacturing, and energy and utilities. Its future plans include free-form diagramming, real-time collaborative web modeling and AI-driven dynamic analytics.

Bizzdesign announced its merger with MEGA International in September 2024, during the research period for this MQ. Both Bizzdesign and MEGA International met the inclusion

criteria for this MQ individually and were evaluated separately.

### *Strengths*

- **Evolving AI capabilities:** Bizzdesign provides a variety of new AI features, such as a diagram importer/describer/styler/generator, natural language analyzer, and dynamic analytics. Bizzdesign has also introduced its AI-enabled “How-to Coach,” which is a natural language chatbot that provides guidance on using and configuring Horizon, based on product documentation and its underlying knowledge base.
- **Maturity-agnostic appeal:** Horizon fully supports high-, medium- and low-maturity EA practices. High-maturity practices can leverage robust customization capabilities (metamodel UI, permissions, integrations). Medium-maturity practices have access to many OOTB frameworks and template-driven artifact creation. Low-maturity practices can leverage prepackaged, rapid-start use cases for common challenges and opportunities, supported by Horizon’s smart assistant, How-to Coach.
- **Broad industry-specific partnerships:** Bizzdesign partners with a variety of subject matter experts to create industry-specific assets. This includes creating Business Architecture Body of Knowledge (BIZBOK) industry models, partnering with NATO on the development of an ArchiMate framework for defense, and working with the U.K. Universities and Colleges Information Systems Association (UCISA) for higher education models, and TNO for automated security operations.

### *Cautions*

- **Customer attrition in smaller accounts:** Although Bizzdesign has seen steady overall customer growth, it has experienced customer attrition, especially in smaller accounts, as it focuses on larger enterprise opportunities. Prospective customers should ensure that they have a sufficient level of support — onboarding and post-implementation — to address their EA practice’s evolving needs.
- **Limited geographic presence:** While Bizzdesign has expanded modestly in North America, the majority of Bizzdesign customers are still located in EMEA. The APAC and LATAM regions are predominantly represented by third-party partners, although Bizzdesign is continuing to grow its direct presence in the APAC region.
- **Full-feature set comes at a cost:** Bizzdesign has developed a modular platform with a low-price entry point, but to benefit from the breadth of Horizon features, including several of its AI capabilities, product costs can rise for customers. Although providing extra

flexibility, the combination of modules, credit-based pricing, license types and consulting can be confusing for customers.

## BOC Group

BOC Group is a Leader in this Magic Quadrant. Its product ADOIT is offered as a SaaS solution, on-premises or as a hybrid cloud proposition. Nearly half of ADOIT customers are in EMEA, with growth in NA, LATAM and the APAC regions. ADOIT has a wide range of customers in the financial services, manufacturing, telecommunications, pharmaceutical, retail and energy industries. Its future plans include continued development of user-centric services, enhancement of its interface, and improvement of AI-based features for governance, scenarios building and analysis.

### *Strengths*

- **Flexible licensing and pricing options:** ADOIT offers a freemium product — ADOIT Community Edition — that provides a hosted ADOIT instance with no time restrictions. BOC Group offers a range of increasingly comprehensive licenses such as Start and Grow tiers, with the ability to further expand as needed. ADOIT allows clients to choose between multitenant, single-tenant and hybrid hosting with increasing capabilities and support-add-on features at cost. The pricing model supports transparency and uses gross domestic product (GDP) mechanisms to flex prices regionally.
- **Comprehensive customer support ecosystem:** BOC Group offers a robust, multifaceted customer support ecosystem to new and existing clients. It offers dedicated support through coaching, tool adoption KPI tracking, online training, tutorials and e-learning courses. Its preemptive support approach leverages an onboarding playbook and e-learning focused on establishing user rights, selecting or defining a lean metamodel, and extending support for modeling patterns.
- **AI recommendation features:** BOC Group continues to augment ADOIT's ML/large language model capabilities to support recommendations for application investment strategies. It does so by providing a smart modeling assistant that creates or augments models and other artifacts. ADOIT AI also explains models, performs multiple checks, such as syntax or consistency checks, and checks for vendor compliance or other principles. Users can also leverage AI to suggest and explore interrelated repository artifacts to ensure consistent names, create and enhance descriptions, and add artifacts and relationships.

## *Cautions*

- **Limited geographic presence:** Although BOC Group has made significant investments in its global sales resources, its core operational resources remain in EMEA. While there has been growth in the NA, LATAM and APAC regions, nearly half of its customers are still based in EMEA. Organizations with globally distributed operations should assess the localization capabilities of BOC Group to ensure sufficient international support.
- **Nominal rebranding impact:** Even though BOC Group rebranded ADOIT to a product/user-centric offering, and targeted users in disciplines beyond EA, this has not translated into consistent growth. As a result, ADOIT's revenue growth continues to lag behind its market leader peers.
- **Overreliance on external AI governance mechanisms:** While ADOIT continues expanding its AI capabilities, it has not extended its own EA governance mechanisms with AI-specific risk management checks yet. This is an opportunity for the BOC Group to develop its own AI trust, risk and security management (TRiSM) measures that evolve with its AI offerings for mitigating AI-related data and security risks.

## **Capsifi**

Capsifi is a Leader in this Magic Quadrant. Its product, Capsifi, is primarily available as a cloud-based, SaaS offering, but supports on-premises and private cloud deployments. Capsifi operations are based predominantly in APAC, with a growing presence in NA and EMEA. Its clients are predominantly in the financial services, healthcare, pharmaceuticals, technology, retail and public sectors. Its future plans include low-code authoring tools for custom configuration, continuous enhancement of an AI-enabled CoPilot for model generation, and multimodel architecture for federated modeling and content inheritance.

## *Strengths*

- **Prioritizing EA return on investment:** Capsifi has prioritized tracking and monitoring the financial KPIs that its customers use to prove EA tool value, using a metrics-driven approach to discovering barriers in EA tool adoption, along with value realization. Capsifi has recently launched a beta version of its EA ROI survey to its product advisory council, and has continued to identify measures of success that CxOs expect from EA activities and deliverables.
- **Deliberate innovation focus:** Capsifi allocates a significant amount of its revenue to R&D and sponsors several doctoral scholarships for studies in semantic technologies and AI.

Capsifi has been able to leverage a robust community of academic researchers to rapidly accelerate its AI capabilities.

- **Accelerating growth with a lean organization:** Capsifi has experienced and sustained consistently high revenue growth with a low employee headcount. Capsifi's growth strategy is centered around its partner ecosystem, rather than retaining a sizable salesforce. Additionally, Capsifi has leveraged its adaptive knowledge navigation, allowing partners to build their own assets and methodologies within the platform.

### *Cautions*

- **Additional costs for implementation and support:** Although Capsifi includes dedicated product coaches with its SaaS license, this is constrained to a fixed hourly allotment based on license tier. Additional expenses are also incurred for implementation services, which include product training. Potential customers should consider the level of implementation and post-implementation support needed before acquiring this tool.
- **Lack of LATAM presence:** Despite Capsifi's customer base being spread evenly across NA, EMEA, and APAC, it does not have any customers in the LATAM region, nor direct sales, partners, resellers, or local resellers in this region. Since Capsifi's price book does not include any currencies for LATAM, customers from this region would require complex currency conversions or third-party payment processing to purchase the product.
- **Sparse AI governance mechanisms:** While Capsifi continues to focus on expanding its tool's AI capabilities, it has not sufficiently addressed its internal ability to handle AI-related risks. Given its future pipeline for delivering new AI features, Capsifi should consider implementing an AI TRiSM framework to tackle AI-related data and security risks.

### **EAS**

Enterprise Architecture Solutions (EAS) is a Visionary in this Magic Quadrant. Its product is based on the installable open-source Essential Project with public-cloud-hosted subscription editions, or licensed as a Docker instance for on-premises or private cloud. With a small user base spread across Europe, North America, Latin America, and Asia/Pacific, it derives most of its revenue from customers in government, education, financial services, retail and healthcare. Its future plans include increased modeling and ArchiMate support, open-source dockerization, leveraging a retrieval-augmented generation framework, and a new visual integration engine.

## *Strengths*

- **Visionary pricing approach:** EAS continues to offer two unconventional EA product options: Essential Cloud, a fixed-price platform with unlimited users; and Essential Open Source, a free, downloadable open-source solution. EAS positions its tool as an enabler of CxOs, enterprise architects, heads of strategy and risk managers, and closely aligns the tool with its training and consulting services. For small teams, there are lower-cost propositions in the market, but Essential's product pricing is unrivaled when organizations require many users.
- **Prioritizing holistic collaboration:** EAS continues to draw on its market understanding to position the Essential product as a tool that supports enterprisewide collaboration on digital transformation. By providing a broad range of role and persona-based insights with free format commenting and ideation, it supports alignment across the enterprise and enables coordinated change.
- **Quick implementation and time to value:** EAS continues to leverage experience from its EA consulting services to provide scenario-specific playbooks for clients. Through a rule-based-engine-driven survey, the product recommends contextualized playbooks based on an organization's EA maturity, goals, stakeholder engagement levels, and access to and quality of data. This is further enhanced by a new AI-enabled assistant — EA Assistant — that can help recommend the best playbook for a given scenario.

## *Cautions*

- **Innovation stagnation:** EAS's ability to introduce innovative features and prove their value has slowed. While EAS's core product and business model continue to be unique, its strategy to augment its product to address disruptive events and trends is unclear. Potential customers should assess whether Essential's product roadmap aligns with their own future ambitions.
- **Uncertain business operations scalability:** EAS has not demonstrated scalability of its business model, having limited resources and a small customer base. It remains to be seen whether the vendor's business can scale while maintaining its highly competitive pricing model. Potential customers should set expectations upfront for a level of service for implementation and ongoing support that will meet their needs.
- **Small market presence:** With its open-source, self-serve and low-cost business model, EAS continues to leverage third-party support to augment its own resources. To increase

market share, it must identify cost-effective ways to more successfully market its product and unique selling points.

## **ins-pi**

ins-pi is a Visionary in this Magic Quadrant. Its YouDesign product is offered exclusively and deployed natively on the ServiceNow (NOW) Platform and is offered as a SaaS, public and private cloud or on-premises solution. ins-pi's operations are focused in North America and Europe, with expansions ongoing in Asia/Pacific, South America, Africa and the Middle East. Its future plans include augmenting EA techniques with AI capabilities, and tools to aggregate target state architecture information across autonomous teams to analyze for consistency and compliance.

### *Strengths*

- **Proximity benefit with ServiceNow (NOW):** Organizations with strategic investments in NOW can quickly leverage IT configuration item (CI) information and operational real-time data to support enterprise architecture management. This can provide clients who use the NOW platform ecosystem with data integration benefits that could potentially optimize the integration cost of ownership across IT4IT tools.
- **Robust data integrity and workflow governance:** YouDesign leverages NOW governance, compliance, data attestation and architecture as code to deliver assurance for repository data. Organizations with IT asset certification and compliance requirements can benefit from these capabilities. In addition, where NOW is used extensively in digital transformation and management, clients can also benefit from the potential productivity and efficiency gains across a range of governance and compliance use cases.
- **Advanced High Availability Architecture (AHA):** Customers benefit from the NOW AHA and multi-instance architecture that provide 99.994% average uptime, global data center pairs, and separate application nodes and database processes for each customer. The NOW global data centers cover more than 31 locations worldwide, providing client organizations with a range of hosting options, including data center pairs exclusively for qualified U.S. federal and Swiss banking customers.

### *Cautions*

- **Limited support for BPMN and ArchiMate imports:** Currently, YouDesign imports only Business Process Model and Notation (BPMN) diagrams and not their associated

repository metadata, and it has no import/export support for ArchiMate diagrams. Organizations with requirements for BPMN and ArchiMate content migration should factor diagram redevelopment into their cost-benefit analysis.

- **OOTB third-party tool integration limited to ServiceNow adapters:** Native integrations are limited by their availability within ServiceNow. This includes Microsoft Azure and Amazon Web Services for cloud infrastructure management, Microsoft Project and Atlassian Jira for project management, Tableau for data analytics, SAP for ERP data, and Splunk for operational intelligence data. Organizations wishing to integrate data with other tools will need to use ServiceNow Integration Hub REST API, which could potentially increase EA tool integration costs. Potential customers should confirm their integration scope and costs when considering ins-pi.
- **Framework and GenAI support:** TOGAF is supported via the UPMX extension pack but metamodel customization is required for other frameworks such as DoDAF, MoDAF, Zachman, eTOM, BIAN and ACORD. Although YouDesign provides sophisticated AI assistance through ServiceNow capabilities, GenAI assistance requires clients to purchase an additional license. This could potentially limit the product's AI capabilities, if customers and prospects cannot justify the additional costs in their EA tool business case.

## MEGA

MEGA International is a Leader in this Magic Quadrant. Its HOPEX platform is available via public or private cloud, and on-premises. MEGA International's customers and operations are geographically spread, with most resources in EMEA, and customers in finance, government, defense, energy and utilities, and healthcare. Its future plans include AI-based data analysis, an AI-driven viewer portal and enhanced architecture discovery.

Mega International announced its merger with Bizzdesign in September 2024, during the research period for this MQ. Both MEGA International and Bizzdesign met the inclusion criteria for this MQ individually and were evaluated separately.

### *Strengths*

- **Integration of AI, business, IT, data and risk in a single repository:** HOPEX supports collaboration across IT portfolio management, risk management, data governance, business process analysis and solution architecture. This benefits large organizations with complexity and regulatory constraints. Less mature enterprises can leverage its

straightforward licensing structure, with modules bundled together as value packs, along with content and accelerators for specific industries. It also provides an AI classification service that automatically cleanses raw data imported from external repositories and has deployed HEXA, a GenAI assistant powered by Azure's OpenAI GPT, allowing users to ask questions about HOPEX architecture using natural language.

- **Overhauled product user experience architecture:** HOPEX's new release, Aquila, dramatically changes the UX/UI and has optimized navigation across its capabilities and features. The introduction and refinement of several automation capabilities, such as AI assistant HEXA, and the new Excel template builder, contribute to a smoother overall user experience.
- **Accelerated architecture development and analysis:** HOPEX's advanced use of AI and automation enables EA teams to boost productivity and accelerate the architecture development life cycle through more efficient data discovery, analysis and content building. This helps architects develop and consolidate application and technology portfolios in weeks rather than months and years.

### *Cautions*

- **Extensive feature offerings complicate pricing:** MEGA International product pricing provides clients and prospects with EA value packs and modular licensing for base and extended features. In addition, the vendor offers at-cost modules to further extend the product's features for framework support, data discovery and governance support. Clients and prospects may find these EA pack and add-on-feature pricing structures complex to navigate and budget.
- **Continued slow growth:** While profitable, MEGA International's continued slow growth in comparison with leader peers may suggest it has limited appeal to prospects. The newly released Aquila version promises to reverse this trend, if its marketing and differentiation strategy and messaging can hit the right notes with prospects.
- **Customer base predominantly in EMEA:** Although MEGA International has customers in North America, APAC and LATAM, the majority of its customers are in EMEA (over 60%). With its recent investment in the Aquila version, MEGA International will need to revisit its marketing and geographic strategy to ensure its product appeal and company perceptions are truly global.

## North Highland

North Highland is a Niche Player in this Magic Quadrant. Its product, NH360 Strategic Portfolio Manager, is delivered as a SaaS offering and is composed of two modules: NH360 Portfolio Insights and NH360 Enterprise Connect. Its main operations are in North America, with some presence in EMEA. It primarily supports clients across energy, life sciences, manufacturing and financial services. Its future plans include portfolio-level what-if analysis, native life cycle approvals and notifications, and continued efforts to enhance the user experience.

### *Strengths*

- **Robust support services:** North Highland leverages its consulting expertise by offering comprehensive professional services support. Customers looking for additional levels of support services (not included in the subscription) have a variety of pricing options to choose from.
- **Stand-alone solutions for quick value realization:** North Highland continues to provide stand-alone product solutions called Accelerators to support specific use cases such as business capability modeling, application rationalization and resource planning. Clients can start with a specific Accelerator offering and then enable additional capabilities in a phased manner.
- **Multidiscipline product design:** NH360 Strategic Portfolio Manager combines EA and strategic portfolio management (SPM) features to help users conceptualize and deliver on initiatives. North Highland maintains that EA is most effective when integrated with an organization's SPM discipline. Using a suite of SPM features that enables the governing and prioritization of investments — in alignment with strategy — EA can then analyze capabilities necessary to realize this strategy.

### *Cautions*

- **Unclear product differentiation:** While North Highland acquired UMT360 in 2023, the strategy to differentiate its rebranded product — NH360 — from other EA tools remains unclear. Although NH360's strategic portfolio management focus is unique, its marketed EA features, such as business architecture support and viewpoint management, are standard for many EA tool vendors. Potential customers should evaluate whether NH360 offers enough EA-specific advantages to justify its adoption over more established competitors.

- **Consulting dependent growth:** North Highland's EA-specific consulting revenue is exponentially higher than its product licensing revenue. Since acquiring UMT360, product licensing revenue has only grown marginally. North Highland is well-established in the management consulting industry, and leverages its significant consulting expertise at a price. Potential customers should evaluate how much post-implementation support they need and compare long-term support costs against competing EA tool vendors.
- **Unimaginative user interface and experience:** Despite North Highland introducing multiple UI/UX updates, the user experience still appears dated relative to competing products. NH360 Strategic Portfolio Manager still does not have any intuitive context-sensitive help or collaboration features, such as publishing of models via Microsoft Teams and Slack-like environments and allowing real-time collaboration and comments on models. These collaboration features are increasingly sought after, and potential customers should consider their non-EA stakeholders' engagement preferences.

## Orbus Software

Orbus Software is a Leader in this Magic Quadrant. Its primary EA offering is OrbusInfinity, a cloud-native, multitenant SaaS product hosted on Microsoft Azure. Orbus Software primarily operates in EMEA, but its customer base is evenly distributed between EMEA and NA. The company has a moderate presence in APAC and a minimal presence in LATAM. Orbus Software has a high concentration of clients in finance, government, manufacturing and energy. Its future plans include conversational UI (native CoPilot offering) as a service, a digital twin solution, and Federal Risk and Authorization Management Program (FedRAMP) authorization.

### *Strengths*

- **High retention amid exponential growth:** Since rebranding to OrbusInfinity, Orbus has seen sharp growth while maintaining low customer turnover, relative to its peers. Orbus's pricing strategy includes an entry-level package that allows clients to scale and mature product usage. The introduction of weighted users (authors and contributors) and viewers allows clients to customize user tool access. Standard support services are now complimentary with an OrbusInfinity subscription, while premium support is available at a fixed percentage.
- **Microsoft 365 specialism with robust integrations:** OrbusInfinity natively integrates Microsoft Teams, SharePoint, Power BI and Power Automate features. Orbus recently released its native integration platform as a service (iPaaS), OrbusInfinity Flow, which

allows for custom integration and workflow automation. Users can leverage a low-code designer to quickly build integrations and workflow automations or access a library of prebuilt integrations via an internal marketplace.

- **Extensive industry assets accelerate learning curve and adoption:** OrbusInfinity includes industry-standards-based diagram and model templates for a wide variety of needs, including government, finance, insurance, healthcare and telecom, as well as generic American Productivity & Quality Center (APQC) industry models. In combination with a variety of role-based modeling capabilities, it reduces time to adopt and benefit from the product.

### *Cautions*

- **Microsoft 365 centricity:** For OrbusInfinity, a Microsoft-centric approach is applied to the platform and embedded collaboration, visualization and automation capabilities. To benefit from the embedded Microsoft features, clients need to bring their own Microsoft 365 Business licenses. Although OrbusInfinity provides a proprietary UI/UX, tight integration with Microsoft 365 can constrain it to a SharePoint look and feel and, ultimately, UX. This can potentially limit Orbus Software's ability to apply meaningful UX improvements.
- **Multiproduct portfolio strain:** Despite aggressive growth of OrbusInfinity, the vendor must continue to devote resources to its separate on-premises product, iServer. While on-premises products are still required for certain customers, their overall relevance has waned in the face of cloud-based deployment options. In an increasingly competitive and consolidating EA tools market, potential customers should be aware of Orbus' potential resource constraints in supporting multiple products.
- **Customer reliance on professional services:** Although Orbus has maintained high customer retention, nearly half of its users leverage paid professional services, in addition to Orbus' product support contracts. Those that opt for professional services often need support aligned to advisory and strategy, implementation and configuration, content conversion and migration, and viewpoint and visualization guidance. Potential customers should ensure the included standard support or optional premium support to the product is sufficient for their current and future needs.

### **QualiWare**

QualiWare is a Leader in this Magic Quadrant. QualiWare X is delivered as a SaaS solution, on-premises or on a private cloud. With operations focused in Europe and North America, the vendor has customers across government, energy, finance, manufacturing and the technology provider market. Its future plans include QualiWare Collaboration Server ([QCS] designed to support horizontal scaling), increased support for team-based meetings, and a new user interface on desktops to aggregate all user journeys and tasks for specific purposes (e.g., implementing standards such as ISO 27701, Digital Operational Resilience Act [DORA], and Corporate Sustainability Reporting Directive [CSRD]).

### *Strengths*

- **Advanced ontology and knowledge management:** QualiWare's ontological foundations (i.e., fundamental classification and relationships of concepts, or things that exist or are important) has shaped its product architecture, enabling it to provide advanced support for controlling how knowledge is shared across federated architectures. This includes how knowledge is shared or not with an AI service and extends into the improved efficiency of data interoperability and discovery across the product's repository.
- **Extensive support for industry verticals and sustainability:** QualiWare continues to invest in industry standards, which supports its focus on large, complex organizations in regulated industries. QualiWare's industry asset catalog now includes DORA, the Cyber Resilience Act (CRA), and CSRD, together with the Supply Chain Operations Reference (SCOR) and Industry 4.0 for manufacturing; APQC for utilities, aerospace and defense; and laboratory asset management for life sciences. Support continues for EA frameworks such as GWEA and EIRA, and the UN Global Compact and Sustainable Development Goals.
- **Consistent growth in innovation:** In QualiWare X, the company invested early in AI functionality that predated the recent GenAI boom. Its AI functionality includes a text-to-model feature that creates a model from a text description, AI-supported PowerPoint presentation generator and diagram explanation, smart AI import, enterprise design (EDGY) language support, augmented reality, and unique 2D and 3D visualizations.

### *Cautions*

- **Continued innovation does not improve growth:** Despite investments in innovation, QualiWare's growth has not materialized, and remains slow compared to market leaders. The divestment of its consulting business in 2021 to refocus on its product has also yet to provide growth dividends.

- **Limited geographic presence:** While leveraging a partner network to support global growth, the majority of the vendor's resources reside in and focus on EMEA and North America. Organizations outside of these regions considering QualiWare must assess local partner support and related SLAs.
- **Rich but conceptually challenging concepts and features:** QualiWare X is a functionally rich product and has continued to demonstrate QualiWare's progress on the Completeness of Vision axis this year. However, the product's ontological strengths and API architecture capabilities require experienced enterprise architects to realize maximum value from these features.

## SAP LeanIX

SAP LeanIX is a Leader in this Magic Quadrant. SAP LeanIX Enterprise Architecture is a cloud-native SaaS product offered on Azure. SAP LeanIX has direct operations in North America, EMEA, APAC, and LATAM, with a strong customer presence in manufacturing, finance, and retail. Its future plans include an AI inventory builder, architecture recommendations, and executive dashboards and KPIs.

SAP completed its acquisition of LeanIX in November 2023.

### *Strengths*

- **Aggressive growth and expanding global reach:** SAP LeanIX continues to generate significant revenue and has the largest direct salesforce in the EA tools market. SAP LeanIX now has access to SAP's vast seller network, and is joining SAP's PartnerEdge program to accelerate expansion in emerging global markets. SAP LeanIX is also leveraging SAP's language localizations and has added additional language options to its product's UI. SAP LeanIX hosts multiple in-person global events to facilitate peer-to-peer interactions, which have dramatically expanded its already significant sales pipeline.
- **Exemplary customer centricity:** SAP LeanIX has robust customer success programs, which guide customers through onboarding, build success roadmaps, and provide integration and engineering guidance. SAP LeanIX hosts multiple, region-specific, customer advisory boards to ensure its product evolves in tandem with customer needs, across multiple geographies. SAP LeanIX has a public product roadmap that allows customers to submit feature ideas and vote on potential features.

- **Streamlined user experience with AI and SaaS discovery:** SAP LeanIX leverages several GenAI assistants and capabilities (OpenAI, SAP Business AI copilot, SAP AI Launchpad) to help users navigate reports and diagrams, and explore guidance from product documentation. Users can also wield embedded AI to generate fact sheet descriptions and field names, and interrogate fact sheets. SAP LeanIX also provides efficient SaaS discovery features to enable accelerated identification of SaaS applications. Identified applications are assigned a confidence score, and can be automatically linked to application fact sheets to help map the current IT estate.

### *Cautions*

- **Post-acquisition product dilution concerns:** Although SAP LeanIX is not replatforming to SAP's Business Technology Platform, its product roadmap has begun including certain SAP-specific items. Because of SAP's diversified product suite, additional SAP LeanIX features may be designed to function exclusively with SAP products or may be redirected into other SAP products. Potential customers should carefully evaluate their organization's usage of SAP products and services to maximize potential synergies or minimize potential capability gaps.
- **Base module lacks breadth:** Entry-level SAP LeanIX continues to focus heavily on application portfolio management capabilities. Clients wishing to benefit from the full EA tool scope will require the Technology Risk and Compliance module and/or the Architecture and Road Map Planning module at an additional cost. While SAP LeanIX integrates with SAP Signavio out of the box to support business process management, it is licensed separately.
- **Simplified approach limits architecture depth:** While SAP LeanIX offers robust capabilities for high-level analysis, it may not provide the granularity required for nuanced insights, relative to some of its leader peers. Potential customers should consider the breadth and depth of their enterprise and business architecture efforts, and evaluate whether this product meets their current and future needs.

## **Software AG**

Software AG is a Leader in this Magic Quadrant. Software AG's Alfabet is available as a SaaS offering, on-premises and as a hybrid solution. Its operations are geographically diversified, and its clients span all industries with a strong foothold in banking and securities,

government, manufacturing, transportation, and retail. Its future plans include embedding AI features, upgraded diagramming features and simplified integration features.

### *Strengths*

- **Flexible volume discounts:** Software AG's volume pricing model optimizes the price per user and functional modules, depending on the size of the organization. This unique pricing strategy, which overlays Alfabet's subscription model, allows for greater flexibility and customization among customers during the use and/or adoption of Alfabet services.
- **Freedom to choose from product offerings:** Software AG provides flexibility to customers to choose from the product offering rather than incurring expense for unutilized features. Furthermore, Software AG has updated its pricing model based on customer preference analysis and has released additional flexible options for customers, thus optimizing the value customers gain out of their investment choices.
- **Multiple industry, software and regulatory frameworks supported:** Software AG offers varied framework suite support to its customers to integrate different frameworks. Certain frameworks are preconfigured, and others can be accessed through their defined accelerators or integrated wherever needed. Software AG thus provides good support for federated organization by embedding varied frameworks to fulfill clients' unique needs.

### *Cautions*

- **Flatlining customer growth:** While Software AG has a significant market share, its customer base continues to be stagnant compared to industry peers over the last few years. Competing for customers with newer, agile and cloud-native products continues to be a challenge, and the vendor's ability to establish an effective growth strategy to attract new customers remains unclear.
- **Reliance on professional services:** A notable amount of Alfabet enterprise customers opt for additional professional services, beyond the standard services, training and scoping. While not atypical in the EA tool space, it is an indicator that customers may require more help than what is included by Software AG during the initial implementation of its tool.
- **Lack of AI-enabled features:** While Software AG continues to provide varied features and offerings through Alfabet, AI features remain stagnant. With technology innovation meeting business demands at a rapid pace, clients' expectations have also been changing. Software AG will need to focus in this area to deliver augmented architecture development features that would help clients meet their EA maturity goals faster.

## UNICOM Systems

UNICOM Systems is a Niche Player in this Magic Quadrant. Its UNICOM System Architect suite is offered on-premises, on private cloud or stand-alone. Primarily sold in North America and Europe, the product is strongest in the government (both military and civilian) and banking sectors. Its future plans include AI-based features, and the addition of accelerators and usability upgrades.

### *Strengths*

- **Round-the-clock support capabilities:** UNICOM Systems continues to provide 24/7 support for users across the globe. This support is able to handle complex requests for service, with product management and development experts stepping in to resolve beyond that. With global, continuous availability, the vendor continues to be well-positioned to support customers through installation and with any usual requests or issues.
- **Extensive tool flexibility:** UNICOM System Architect provides robust flexibility to extend the tool's usage based on custom needs. Marketed as a "tool's tool" — it allows customers to shape the tool to their specific requirements and vision. Moreover, customers have complete freedom to customize their metamodel.
- **Strong reporting mechanisms:** UNICOM System Architect provides substantial support for building reports and dashboards. It boasts sophisticated mechanisms for information sharing, and its reporting engine allows for quick building of reports and converting to HTML/PDF files.

### *Cautions*

- **Primarily focused on government clients:** Although UNICOM System Architect caters to a broad range of client industries, 50% of its revenue comes from government clients, and its product offering continues to draw customers from these industries. Nongovernment customers considering UNICOM System Architect should assess its ability to support their industry's business and technology transformation use cases and priorities.
- **Lackluster innovation strategy:** UNICOM System Architect has been in the EA tool market for over 30 years, and UNICOM continues to invest in core product enhancements. However, with clients' demands shifting toward AI and augmented architecture

development, UNICOM has not articulated a comprehensive innovation strategy to address long-term product intentions.

- **Limited support for tracking ESG metrics:** While UNICOM provides its customers with free-hand support for creating their own ESG tracking measures, it is complex relative to competing EA tool products. Potential customers looking to track sustainability goals will be met with a lack of sophisticated mechanisms, requiring manual intervention to be self-reliant in this area.

## ValueBlue

ValueBlue is a Challenger in this Magic Quadrant. Its BlueDolphin product is offered exclusively as a SaaS-based solution on Microsoft Azure. With operations focused in EMEA, and growing in North America and Asia/Pacific, ValueBlue targets a broad range of industries with a core footprint in the public sector (including central and local government), cure and care, energy and utilities, financial and IT services, and education. Its future plans include support for AI-assisted modeling, AI-powered information collection, OOTB integration with Atlassian Jira and enhancing its built-in insight reporting capabilities.

### *Strengths*

- **Product features accessible to all users:** BlueDolphin has a range of features that readily provide value to users inside and outside of EA. These include a framework of templates and models to guide users through the architecture journey, covering but not limited to innovation management, solution architecture design, governance, compliance, and risk, project and portfolio dependencies and value chains. There is an intentional emphasis on supporting strategic planning, impacts and business transformation. Providing these features increases engagement and collaboration opportunities throughout customer organizations.
- **Emerging focus on solution design and delivery:** By focusing on how the product's features support solution design and delivery, ValueBlue is subtly changing the perception and role the solution architect user persona has in strategy execution and digital transformation. This potential product-feature repositioning may open up new growth opportunities in the EA tool market.
- **Intuitive onboarding and supported implementation with clear pricing:** Customers continued to benefit from BlueDolphin's transparent and simple-to-understand pricing and onboarding approach. User learning curve and product navigation are efficient, and

further boosted by the recent addition of an AI chatbot assistant. The vendor also bundles valuable after-sales services in annual subscription fees to support ongoing product adoption and track its performance against client objectives and KPIs.

### *Cautions*

- **EMEA-focused operations and customer base:** Most of ValueBlue's resources are based in EMEA, including 80% of its growing customer base. Offices in North America have yet to translate into significant customer growth. For ValueBlue to grow internationally, it must develop a more viable marketing and geographic strategy, supported by scalable operations and workforce.
- **More cautious to adopt AI capabilities:** Although its AI assistant provides much-needed automation support for users, ValueBlue has been slower than some of its peers in introducing innovations where AI can benefit its product's users. Whether this translates into a more cautious and less ambitious roadmap for AI innovations when compared with its peers needs to be considered by prospects that want a higher degree of AI augmentation and support for enterprise architecture management use cases.
- **Less extensive set of features:** While ValueBlue continues to invest highly in product R&D, it prioritizes ease of use over product complexity. As a result, its feature set lacks the richness of its Leader-pack competitors. For it to truly challenge market leaders, ValueBlue will need to become more efficient and targeted at translating its R&D investments into competitive and disruptive product features.

## Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

### Added

- ins-pi

## Dropped

No vendors were dropped from this Magic Quadrant.

## Inclusion and Exclusion Criteria

The inclusion criteria represent the specific attributes that Gartner analysts believe are necessary for inclusion in this research. In this inclusion criteria:

- The vendor product or offering refers to the vendor's single primary EA product (not a suite of products) — software acquired under a single license, using the same codebase and repository, not requiring any customized integration to access and exchange data. Such products can comprise multiple modules or features unlocked as part of pricing schemes within the license.
- License revenue includes software license and software maintenance, and software upgrade revenue for higher tiers of the vendor's single primary EA product and additional functionalities, and modules (not services-related), but excludes hardware and professional services.

To qualify for inclusion in this Magic Quadrant, vendors must meet all the criteria set forth across the following three dimensions.

**Performance:** In the last fiscal year 2023 through 2024, the vendor had to have either realized:

- At least \$8 million in licensing revenue over the calendar year for the vendor's single primary EA product (not a suite of products) *or*
- 30% year-over-year revenue growth over the last three calendar years (as validated by the vendor's most senior financial officer) for its single primary EA product

**Market momentum:** To qualify for inclusion, the vendor had to have demonstrated market momentum between 30 April 2023 and 30 April 2024 for the primary EA product through a minimum of:

- At least 10 new customer wins (net new logos), headquartered in each of a minimum of two of the four major geographic regions (major global regions are defined as EMEA,

APAC, NA and LATAM), with its single primary EA product (not a suite of products) in production.

- That is a total of 20 new customers in two regions in 12 months.

**EA tool market focus:** To qualify for inclusion, as of 30 April 2024, the organization must have:

- An installed base of at least 100 customers (unique logos) who use the vendor's single primary EA product (not a suite of products) in production *and*
- General availability as of 30 April 2024 for the vendor's single primary EA product *and*
- The vendor's single primary EA product demonstrably supports all five mandatory use cases and include/embed all of the mandatory features, and at least three of the common features as defined in the Market Definition/Description section

## Honorable Mentions

Sparx Systems has been a consistent and mature provider of EA tooling for more than 20 years, with a worldwide presence. While strong on features, extensibility and framework coverage, its product did not meet the inclusion criteria of having a single primary EA product.

## Evaluation Criteria

### Ability to Execute

We evaluated the vendors' Ability to Execute in the EA tool market by using the following dimensions and criteria.

**Product or service:** We assessed how and what the vendor's EA tool offers EA practitioners. This includes current product/service capabilities (including differentiating capabilities), quality and feature sets, as defined in the Market Definition/Description section, whether offered natively or through OEM agreements/partnerships. Where responses rely on third-party products or products requiring separate licensing, these must be clearly identified. We assessed products on how well they meet the critical capabilities and support the use cases.

**Overall viability:** We assessed the viability of the vendor's overall financial health, focusing on growth in revenue, profitability, customer base, etc., and the financial and practical success of the business. This also includes our assessment of the likelihood that the vendor will continue to offer and invest (R&D, sales, vertical and regional strategies, etc.) in the product, as well as advance the product's position within its current product portfolio. We compared organic growth to growth by other means, including growth by acquisition or by securing additional funding. We value organic growth more highly than other types of growth.

**Sales execution/pricing:** We assessed the vendor's sales execution and clarity in pricing, including presales activities and the structure that supports them. This includes responsiveness in sales engagement, deal size and management, pricing and negotiation, presales support, scalability, and the overall effectiveness of the sales channel.

**Market responsiveness and track record:** We assessed each vendor's recent history of responsiveness to customer requests and the timeliness of these responses in terms of the product life cycle (updates and releases, etc.). This includes mechanisms for both responding quickly and changing development and/or company direction to meet the needs of an evolving marketplace. We also examined each vendor's recent track record in the field.

**Marketing execution:** We assessed the clarity, quality, creativity and efficacy of each vendor's programs, campaigns and events designed to deliver its message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of customers.

**Customer experience:** We assessed each vendor's products and services and/or programs that enable customers to achieve anticipated results with the products evaluated. This includes track record of successful implementations, mechanisms for ensuring customer success/support, and at what cost. We assessed the responsiveness of each vendor, customer experience of doing business with it and customers' overall perceptions of each vendor.

**Operations:** We assessed each vendor's ability to meet its goals and commitments. Factors include the quality of the organizational structure and its resources across all functions. This includes skills, experiences, programs, systems, applicable standards, the underlying infrastructure, and other vehicles that enable a vendor to operate effectively and efficiently on an ongoing basis.

Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Product or Service	High
Overall Viability	High
Sales Execution/Pricing	High
Market Responsiveness/Record	Medium
Marketing Execution	Medium
Customer Experience	High
Operations	High

Source: Gartner (November 2024)

Completeness of Vision

**Market understanding:** We assessed each vendor’s understanding of the market dynamics, including trends, competitor activity, customer needs, and emerging use cases and personas, and how it translates these into products and services over a three-year time horizon. Vendors that show a clear vision and expression of their market are those that listen, understand customer demands, and can shape or enhance market changes with their added vision.

**Marketing strategy:** We sought clear, differentiated messaging that was consistently communicated internally and externalized through the vendor’s website, social media, advertising, customer programs and positioning statements. This included differentiating strategy based on regions, specific countries and buyer personas, and ways to measure and adapt the strategy.

**Sales strategy:** We wanted to understand the vendor’s sales strategy and how it leveraged direct and indirect sales, marketing, service, and communication. We also examined the use and reliance on partners to extend the scope and reach of the vendor, focusing on the levels of expertise and technology required, as well as the partners’ services and customer base. Our assessment also included target customer personas and sales strategies differentiated for their context, size, level of maturity and geographic locations.

**Offering (product) strategy:** We explored the vendor’s approach to developing a compelling product and service vision with an emphasis on market differentiation, functionality, methodology and features as they map to current and future requirements.

**Business model:** Our assessment explored the design, logic and execution of the vendor’s business proposition to achieve continued success. This included support for customers in different deployment modes, alongside a vendor’s business capabilities, its overall value propositions, related profit models and the resources at its disposal.

**Vertical/industry strategy:** We assessed the vendor’s strategy to direct resources (sales, product and development), skills and offerings to meet the specific needs of individual industry segments, including any focus on specific industry verticals and associated standards, and an illustration of revenue performance from its top sectors.

**Innovation:** We explored the vendor’s innovation vision, considering its resources, expertise and capital for investment. We looked for a strong product vision that pushes the market forward while considering the disruptive and opportunistic forces of digital on businesses. We also considered the vendor’s ideas for innovation and future development of the market.

**Geographic strategy:** We looked at the vendor’s strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the “home” or native geography, either directly or through partners, channels and subsidiaries, as appropriate for that geography and market.

**Completeness of Vision Evaluation Criteria**

<i>Evaluation Criteria</i>	<i>Weighting</i>
Market Understanding	High

<i>Evaluation Criteria</i>	<i>Weighting</i>
Marketing Strategy	High
Sales Strategy	High
Offering (Product) Strategy	High
Business Model	High
Vertical/Industry Strategy	High
Innovation	High

Source: Gartner (November 2024)

## Quadrant Descriptions

### Leaders

Leaders have a deep understanding of the realities of the market, a reliable global delivery record and an ability to influence the market’s direction, along with an ability to attract and keep a growing customer base. In the EA tool market, leadership implies understanding, facilitating and supporting the strategic role that enterprise architects play at a much broader level. They are more business-strategy-focused, with a shared operating model at the business level that helps drive the relationship with IT. Leaders must not only demonstrate a market-leading vision, but also the Ability to Execute on that vision.

It’s important to note that a vendor that demonstrates a high Critical Capabilities (CC) position will not necessarily have a high Magic Quadrant (MQ) position. This is because the MQ evaluation focuses on the Ability to Execute and Completeness of Vision, informed by 15 dimensions, out of which only two dimensions are product-related.

At this point in the development of the EA tool market, 10 vendors have sustained excellence in both execution and vision long enough to demonstrate effective leadership. Recent announcements of mergers and partnerships by the Leaders have the potential to both consolidate and disrupt the market.

Customers should note that a Leader is not always the best choice. A focused, smaller vendor also can provide excellent support and commitment to suit individual needs. Other vendors may provide a certain capability — such as a focus on your industry, a better cost-performance ratio, or a commitment to specific features or functions — that is important to your organization. This more focused type of vendor would not appear as a Leader in the overall EA tool market but, within a specific market segment, it may well be treated as one.

## **Challengers**

Challengers excel in their ability to attract a large user following, but this ability is limited to a subset or segment of the market. For that target audience, Challengers are effectively Leaders, but that specificity presents a barrier to adoption for those outside that subsegment. For example, in the EA tool market, a Challenger may have a strong, proven presence or following, but lack sophistication in the evolving use cases for EA tools. Alternatively, a Challenger might understand those use cases well and achieve a strong following in its home market, but still struggle to deliver the same levels of success on a global scale.

One vendor is designated as a Challenger in the EA tool market this year.

Although Challengers are typically of significant size with significant financial resources, they may lack elements of the vision we expect, innovative ideas and plans, or an overall understanding of market needs. In some cases, Challengers may offer products that dominate a large, but shrinking, segment of the market. Challengers can become Leaders if their vision develops. Large companies may move between the Challengers and Leaders quadrants as their product cycles and market needs shift.

## **Visionaries**

Visionaries in a market are the innovators driving the market forward by responding to emerging, leading-edge customer demands and offering new opportunities to excel. Typically, these vendors appeal to leading-edge customers and may even have minimal mainstream presence or name recognition. Their ability to deliver sustained and dependable execution in the mainstream enterprise market is not sufficiently tested. Visionaries enable model-driven enterprises, focusing deeply on the business and its strategy rather than on the traditional fixation of EA on the scope of IT.

Within the EA tool market, there are two Visionary vendors in this year's Magic Quadrant. One vendor is highly disruptive to the established players with its open-source offering for unlimited users and low-cost support service subscription. The other takes advantage of an established adjacent market player for a go-to market.

Visionaries can eventually grow to become Leaders. Alternatively, they may decide to limit their target markets to focus on their core competencies, core technologies or existing customers, and become Niche Players. They could also develop their specialties to advance in execution and become Challengers.

## Niche Players

Niche Players choose to operate in a subsegment of a market, or they have a limited ability to innovate or outperform other vendors in the wider market. This limitation may result from a focus on a particular area of functionality, vertical industry or region, or because they are new entrants. Alternatively, Niche Players may struggle to remain relevant in a market that is moving away from them. Niche Players may have reasonably broad functionality, but limited implementation and support capabilities and relatively limited customer bases.

This Magic Quadrant has three Niche Players. Some of these vendors have transitioned from other markets and need to focus fully on EA in order to progress. A couple remain stagnant in their vision and have limited Ability to Execute. Others lack the modern architecture of many of the vendors in the Challengers, Leaders or Visionary quadrants.

Assessing Niche Players is more challenging than assessing vendors in other quadrants. This is because some could make progress, while others may not execute well and/or lack the vision and means to keep pace with broader market demands. Even if a Niche Player seems perfect for your requirements, it is probably developing contrary to the market's overall direction, in which case it can represent a risky choice with limited long-term viability.

## Context

This Magic Quadrant focuses on EA tool vendors' placement in the market, not specifically on the capabilities of their products (for a more detailed evaluation of the products, see [Critical Capabilities for Enterprise Architecture Tools](#)). Only two of the 15 evaluation criteria in this Magic Quadrant relate to product or service functions. The other 13 evaluation criteria focus on the vendors' ability to meet the requirements of this market (for details, see the

Inclusion and Exclusion Criteria and Evaluation Criteria sections). In response to changing client needs, Gartner adjusts the weight of different evaluation criteria in order to accurately reflect the state of the market. This year's Magic Quadrant analysis has shifted to a balanced focus on growth and market share, which enables a more informed view of how the current market is evolving and its future direction.

As part of our evaluation process, we used five key use cases that we believe are important to enterprise architects, as well as to the senior leadership that vendors need to support to maintain relevance in the EA tool market:

- **Enterprise transformation and portfolio management:** Enterprise architecture practitioners must be able to (1) Produce and manage models to guide enterprise adaptation to changing strategies, objectives, and outcomes, and (2) Utilize these models to help build, analyze, manage, and assess IT portfolios and related risks, opportunities, and recommendations in preparation for execution.
- **Advanced roadmapping:** Enterprise architecture practitioners need to be able to build, present and communicate roadmaps that describe enterprisewide transformation, and investment decisions for a broad range of enterprise viewpoints, where these viewpoints correspond to changes in the market, regulations, enterprise (business and IT) strategy, objectives, outcomes, and architecture.
- **Solution architecture design and delivery:** Enterprise architecture practitioners need to be able to efficiently design and communicate strategic, tactical, and emergent solution architecture that is aligned to enterprise standards, while ensuring these designs can be easily consumed and implemented by teams to deliver products and services at pace and at scale.
- **Enterprise architecture governance:** Enterprise architecture practitioners need to define the guidance, processes and policies required to support multiple governance styles (from control to autonomous) and mechanisms that deliver required business outcomes in a given context, striking a balance between risk and agility. In addition, the validation of the guidance includes the tracking of architecture health and decisions across enterprise transformation initiatives.
- **Innovation and sustainability:** EA practitioners must be able to help organizations track and leverage emerging trends and technologies through structured, flexible and iterative methods. This includes identifying and tracking improvements in sustainability.

# Market Overview

EA tools provide a centralized, consolidated source of truth about the enterprise. They capture the constraints of the IT assets, processes, value streams, change programs and projects. EA tools relate these to support business strategy and the enterprise's ecosystem of relationships up and down the value chain. They provide a critical resource to help organizations mature and improve their business operations, as well as the enterprise's operating model. They are increasingly integrated directly with tools in adjacent categories, such as project and portfolio management (PPM), CMDB and innovation.

Many of the vendors considered in this research provide tooling to integrate directly with leading providers, such as ServiceNow and Jira. This trend will continue, with EA tools providing the ability to accurately describe the connective tissue that ties together all the different elements of the "patchwork quilt" needed to support the modern enterprise. We also expect to see players in these adjacent territories, such as asset management and strategic portfolio management, flex their muscles, either buying or launching their own EA tools.

Many vendors in this market have taken advantage of recent developments in generative AI to provide enhanced features that ease the management of data in the repository and generate recommendations and artifacts. We expect to see continued enhancement of tools in this market through introduction of additional AI/ML functionality as the technology matures.

There are two merger and acquisition (M&A) activities and one partnership announcement worth noting in this market for 2024:

- In September 2024, Ardoq acquired ShiftX, a process mapping, management and runtime tool. The acquisition brings IP that will open up new opportunities across business roles.
- In September 2024, Bizzdesign and Mega International announced their merger. While the involved vendors are still in the process of figuring out their combined strategic and operational direction, this merger has the potential to disrupt and/or consolidate the EA tools market.
- In September 2024, Ardoq and Celonis announced the launch of a joint solution for business transformation leveraging the process mining and intelligence capabilities in

## Acronym Key and Glossary Terms

APAC	Asia/Pacific
CMDB	A configuration management database is a repository that is designed to store many of the components of an information system. A key goal of a CMDB is to help an organization understand the relationships between different components and track their configuration.
EMEA	Europe, the Middle East and Africa
FedRAMP	The Federal Risk and Authorization Management Program provides a cost-effective, risk-based approach for the adoption and use of cloud services by the United States federal government. The FedRAMP Authorization Act codifies the FedRAMP program as the authoritative standardized approach to security assessment and authorization for cloud computing products and services that process unclassified federal information.
LATAM	Latin America
Metamodel	A metamodel or surrogate model is a model of a model, and metamodeling is the process of generating such metamodels. Metamodels catalog each type of component in an EA, provide detailed definitions, document the relationships between one component and another, define the structure and configuration of the architecture itself, and help users understand the structure and behavior of the architecture.
ML	Machine learning is a field of study in artificial intelligence concerned with the development and study of statistical algorithms that can learn from data and generalize to unseen data, and thus perform tasks without explicit instructions.

NA	North America
NATO	The North Atlantic Treaty Organization is a political and military alliance of countries from Europe and North America.
SOC 2	System and Organization Control 2 is an auditing procedure that ensures your service providers securely manage your data to protect the interests of your organization and the privacy of its clients.
TNO	Toegepast Natuurwetenschappelijk Onderzoek (English translation: Dutch Organization for Applied Scientific Research) is an independent statutory research organization in the Netherlands that focuses on applied science.
UCISA	The Universities and Colleges Information Systems Association is a membership organization that represents almost all the major U.K. universities and higher education colleges with a growing membership among other educational institutions and commercial organizations interested in information systems and technology in U.K. education.

## ⊕ Evaluation Criteria Definitions

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