Magic Quadrant for Enterprise Architecture Tools

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By Austin Steinmetz, Andrei Razvan Sachelarescu, **and 2 more**

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 an EA tool that supports enterprisewide visibility, long-term transformation, and business-outcome realization.

Market Definition/Description

Gartner defines the market for enterprise architecture (EA) tools as tools that allow users to capture interrelationships and interdependencies within and across an organization's ecosystem of applications, capabilities, processes, operating models, roles, information and technologies. EA tools provide a central repository to capture data and metadata about artifacts that describe the enterprise. Users build models and viewpoints to represent the relationships between these artifacts, helping describe and shape the future of the enterprise. EA tools enable analysis of trends, disruptions, and other drivers of enterprise change to deliver realistic roadmaps and explore potential scenarios.

EA tools provide a means to model the IT and business 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, from business to IT.

EA tools are utilized across a wide range of architecture and IT disciplines, such as business, information, solution, security, applications and infrastructure. EA tools provide detailed insights and support informed decision making by functioning effectively across various domains. To support an extensive range of stakeholders, EA tools must also facilitate the consumption of, and contribution to, the information contained within the repository. To perform their work, users switch between an expansive 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 (BPM) 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, along with regulatory or security frameworks to abide by.

- **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:** Conversational 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

CHALLENGERS

LEADERS

SAP LeanIX

Orbus Software
Ardoq
Bizzdesign

BOC Group

ServiceNow

GBTEC

Avolution

QualiWare

ValueBlue

ins-pi

Bee360

UNICOM Systems

Sparx Systems

ABILITY TO EXECUTE

NICHE PLAYERS

VISIONARIES

COMPLETENESS OF VISION

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Vendor Strengths and Cautions

Ardoq

Ardoq is a Leader in this Magic Quadrant. Headquartered in Oslo, Norway, the company was founded in 2013 and has approximately 250 employees. Ardoq's eponymous EA product is delivered exclusively as a SaaS offering in both the public and private cloud. Ardoq's pricing model is primarily based on a per-application count, with supplementary product modules and add-ons available at additional cost. Advanced AI capabilities are included within each of Ardoq's different product modules and are not priced separately.

Strengths

- **Innovation prioritization:** Ardoq allocates nearly half of its revenue to product development and has delivered the majority of items on its ambitious product roadmap. Ardoq also has a dedicated applied research team that tracks adjacent technology market evolutions, which has enabled proactive and forward-looking product enhancements.

- **Inherently flexible metamodel:** Ardoq is built on a graph database and is not bound to a predefined metamodel. Ardoq does not require any custom development to add unique components or reference types, which helps streamline adaptations to specific business contexts.

- **Strategic focus on business process management:** Ardoq positions its product at the intersection of enterprise architecture and business process management. This strategic direction is evident in the launch of its optional Process Mapping add-on, its partnership with Celonis, a comprehensive SAP Signavio integration, and its acquisition of ShiftX — a collaborative business process tool.

Cautions

- **Elevated organizational change:** In the past year, Ardoq has undertaken significant business transformations, such as a core personnel restructuring and a comprehensive overhaul of its pricing model. There has also been an influx of executive and senior-level hires, at a rate far exceeding that of its market peers. These actions, combined with Ardoq's intent to become cash flow positive and profitable in the next fiscal year, may result in near-term disruption.

- **New pricing model may constrain EA scope:** Pricing for Ardoq is now primarily based on the number of applications. For organizations with large application portfolios or those seeking holistic enterprise architecture coverage, this pricing model can become cost-prohibitive. This may result in selective or incomplete application visibility, reducing the overall value of Ardoq for large-scale initiatives. Ardoq's definition of an "application" is subject to change and may result in unexpected costs or adjustments during contract renewals.

- **Limited presence in emerging markets:** Compared with its Leader peers, Ardoq has relatively few customers in Latin America and the Asia/Pacific region. Although demand for EA tools is growing in these markets, Ardoq's continued reliance on regional sales partners has not resulted in notable expansion. Ardoq's English-only language support

further complicates its ability to gain traction and serve customers in these emerging markets.

Avolution

Avolution is a Leader in this Magic Quadrant. Headquartered in North Sydney, Australia, the company was founded in 2001 and has approximately 100 employees. Its enterprise architecture product, ABACUS, can be delivered as a SaaS offering in both public and private cloud, or as an on-premises deployment. ABACUS's pricing model is primarily based on a per-user charge, with supplemental modules available at additional costs. Advanced AI capabilities are complimentary as part of the Advanced and Enterprise bundles, but are subject to a fee in the Foundation bundle.

In December 2024, Avolution received external investment from private equity firm Whiteoak. Subsequently, in January 2025, Avolution appointed a new CEO as part of this investment initiative. A further CEO transition took place in October 2025.

Strengths

- **Capital infusion drives modernization:** Avolution's injection of capital from Whiteoak has doubled its marketing budget, increased its resources across product development and operations, and enabled a UI/UX modernization for power users. Avolution is also in the midst of a website overhaul, and has opened a new office in Germany, with further geographic expansions planned.

- **Broad framework support:** ABACUS supports a comprehensive catalog of over 100 out-of-the-box EA, IT, software-related, industry-specific, government, and defense frameworks. Users can configure, adapt, or combine these frameworks through an intuitive drag-and-drop interface — a process that is typically complex or nonexistent in competing tools.

- **Comprehensive analysis capabilities:** ABACUS provides wide-ranging support for multiscenario and gap analysis, current-state versus future-state diagram comparison, and foundational financial analysis. Users can leverage a library of prebuilt, no-code algorithms that span diagnostic, operational, and predictive use cases.

Cautions

- **Lackluster innovation strategy:** Despite Avolution's increases to its product development budget, it remains unclear how these investments have translated into meaningful

product advancements. During the evaluation period, ABACUS's product roadmap consisted mostly of minor enhancements rather than transformational features. Also, Avolution did not articulate a refreshed innovation strategy or provide sufficient evidence of recent innovations.

- **Elevated customer churn:** Although Avolution has experienced customer growth, its churn rate was higher than the majority of its competitors and well above the industry average for software organizations of similar size. The majority of ABACUS customers are on annually recurring contracts, which increases the chance of year-over-year retention volatility and fluctuations in renewal rates.

- **Customer reliance on post-implementation support:** Over 80% of ABACUS users opt for paid professional services in addition to Avolution's standard product support contracts. While Avolution has reduced prices for select levels of professional services — leading to increased usage — the proportion of customers using paid professional services is higher than most of its market competitors. This may indicate a product with a steep learning curve or that the included product support is insufficient.

Bee360

Bee360 is a Niche Player in this Magic Quadrant. Headquartered in Karlsruhe, Germany, the company was founded in 2003 and has approximately 80 employees. Bee360's eponymous EA product can be delivered as a SaaS offering in both public and private cloud, or as an on-premises deployment. Bee360's pricing model is primarily based on pricing tiers that correspond to the size of the managed IT budget a customer organization manages within Bee360, with charges applied either monthly or annually. Basic AI features are included in the cost of the Bee360 license, but customers are required to use their organization's AI API key(s).

Strengths

- **Holistic IT and business management focus:** Bee360 positions its product as a holistic solution spanning enterprise architecture, IT financial management, and strategic portfolio management. To maintain consistency across these disciplines, Bee360 leverages a standardized governance model during implementation. This has allowed the company to simplify its internal processes related to customer onboarding, while providing customers with a common language for decision making.

- **Long-term customer relationships:** Bee360 has high contract renewal rates and one of the market's longest average customer contract lengths. By specifically targeting CxOs, Bee360 has ensured its product addresses the needs of executive leadership, resulting in increased loyalty and retention.

- **Strong Asia/Pacific presence:** Nearly one-third of Bee360's customer base is located in the Asia/Pacific region, representing a significant share compared with most EA tool vendors, which have traditionally focused on Europe and North America. This distribution highlights Bee360's attention to markets where EA tool adoption is on the rise. Comprehensive language support further enables organizations across the Asia/Pacific region to easily access and utilize Bee360.

Cautions

- **Standardization stifles unique needs:** Bee360's standardized and holistic approach to implementation may not accommodate organizations with unique requirements or varied interpretations of enterprise architecture. EA practices without extensive need for IT financial management or strategic portfolio management capabilities may find the additional functionality for these disciplines cumbersome.

- **Unstructured innovation and limited technical differentiation:** Bee360 does not have a dedicated R&D budget and has indicated its focus is on execution rather than innovation. Its strategy to parlay customer and partner feedback into product enhancements is also unclear. During the evaluation period, Bee360 explicitly stated that it does not differentiate on technology, but instead on thought leadership.

- **Limited built-in support for industry frameworks:** Bee360 continues to prioritize its own holistic governance model — BeeCore — and does not offer comprehensive out-of-the-box support for industry, software, or compliance frameworks. Users can still integrate or leverage industry frameworks, but they are not directly embedded.

Bizzdesign

Bizzdesign is a Leader in this Magic Quadrant. Headquartered in Enschede, Netherlands, the company was founded in 2000 and has approximately 600 employees. Its EA product suite contains three standalone EA tools: Alfabet, HOPEX, and Horizzon. Each can be delivered as a SaaS offering in both the public and private cloud, or as an on-premises deployment. The primary pricing model for the tools is based on a per-user charge, with supplemental

modules and add-ons available at additional cost. Bizzdesign offers cross-sell licensing to combine functionalities across its product suite. AI capabilities are complimentary in the Alfabet and HOPEX products, but are subject to separate consumption-based pricing in Horizzon.

Bizzdesign acquired MEGA International in September 2024 and announced the acquisition of Software AG's Alfabet product in January 2025. In this Magic Quadrant evaluation, Bizzdesign — and its EA tool product suite — have been assessed together as a single business entity. Alfabet, HOPEX, and Horizzon have been assessed separately as three distinct products in Gartner's Critical Capabilities for Enterprise Architecture Tools.

In May 2025, Bizzdesign announced a new product under development — Bizzdesign Unify. For the purposes of this evaluation, Bizzdesign Unify has been considered part of the organization's overall vision but has not been included as part of Bizzdesign's EA product suite.

Strengths

- **Acquisition-led growth and diversification:** Through its acquisitions, Bizzdesign has grown its customer base sevenfold and has tripled its annual revenue since last year's evaluation. Bizzdesign has also significantly increased the size of its product development and professional services teams, while maintaining a similar level of marketing and business development roles. Bizzdesign has further diversified its geographical customer base with a significant increase in Latin America-based organizations.

- **Ambitious organizational strategy:** Bizzdesign's acquisition of two EA tool competitors, coupled with the announcement of a new product in development, demonstrates its ambitious approach to reshape the EA tools market and strengthen its competitive position against market peers. Bizzdesign's future product is being developed to complement its existing product suite and simultaneously bridge long-standing gaps between EA tools, diagramming and modeling tools, and enterprise business platforms.

- **Comprehensive feature set across the product suite:** Bizzdesign's EA product suite fully supports a myriad of use cases and maturity levels across every architecture domain. Users will also find adjacent discipline functionalities within the product suite, such as business process management, strategic portfolio management, technology portfolio management, and governance, risk and compliance. Bizzdesign's cross-selling option —

which keeps the primary pricing model identical — allows users to mix and match specific product functionalities across its product suite under a single license.

Cautions

- **Multiproduct strain and uncertainty:** Bizzdesign has committed to supporting three standalone EA tools for the next five to seven years, while also developing and launching its new Unify product in parallel. This approach introduces significant administrative complexity, as Bizzdesign will need to dedicate substantial resources to maintaining multiple tools — each with different codebases and deployment options. For customers who plan to only use a single product in Bizzdesign's product suite, this may mean slower progress on, diminished attention to, or less ambitious individual product roadmaps.

- **Overlapping product capabilities:** Although each of Bizzdesign's products is marketed as relatively differentiated, all three still contain a significant amount of capability overlap. This is especially pronounced in select EA capabilities such as modeling, repositories, integrations, presentation, innovation and sustainability management, and AI assistants. The presence of similar capabilities across multiple offerings may complicate product selection for prospective customers.

- **Inherited on-premises customer dissonance:** Through its acquisitions, Bizzdesign has inherited a significant number of on-premises customers. However, Bizzdesign has explicitly positioned itself as a SaaS-first organization through its sales channels, with hybrid and on-premises options offered only as exceptions. While Bizzdesign has committed to simultaneous updates across deployment options, this SaaS-first orientation may result in feature parity incongruence, with on-premises customers receiving updates or new features later than SaaS customers.

BOC Group

BOC Group is a Leader in this Magic Quadrant. Headquartered in Vienna, Austria, the company was founded in 1995 and has approximately 310 employees. Its EA product ADOIT — part of the ADOXX platform — can be delivered as a SaaS offering in both public and private cloud, or as an on-premises deployment. ADOIT's pricing model is primarily based on a per-user charge, with supplementary product add-ons available at additional costs. Advanced AI capabilities are complimentary in its Grow or Individual pricing plans.

Strengths

- **Straightforward pricing and accessible licensing:** BOC Group's pricing model is clear and straightforward, with its website outlining the price for edit-users, readers, and ADOIT Form-users. ADOIT's pricing page displays prices in different currencies for each of its product tiers. BOC Group also offers the Individual plan with the option for individual customization and advanced tech support, as well as a completely free product version — ADOIT Community Edition — that provides a hosted ADOIT instance with no time restrictions.

- **Complimentary AI feature set:** ADOIT provides a robust set of complimentary AI features, which can be activated via self-service, in several of its primary pricing plans, such as text-to-diagram creation, automated compliance checks, and decision support. While many of its market competitors provide basic AI functionality for free and charge separately for advanced features — typically on a consumption basis — ADOIT distinguishes itself by including advanced AI capabilities at no additional cost. This allows its customers to avoid extra fees and complex usage-based pricing.

- **Prioritization of customer autonomy:** BOC Group has transitioned a range of back-office tasks and end-user ADOIT features to a self-service model, allowing customers to independently set up configurations and connectors that previously required paid professional services. This approach has enabled BOC Group to reallocate resources from professional services, business development, and support to product development, further prioritizing product innovation.

Cautions

- **Significant on-premises customer base:** A substantial portion of ADOIT customers remain on on-premises deployments, despite BOC Group's meaningful efforts to prioritize SaaS in its sales strategy and migrate existing users to its cloud-based offering. The persistence of on-premises installations may hinder BOC Group's ability to accelerate SaaS innovations, as product development teams must continue to maintain and update multiple product versions.

- **Limited brand awareness outside Europe:** Although BOC Group has invested significantly in expanding ADOIT's presence beyond its core European market, ADOIT is still rarely referenced by Gartner clients in North America, Latin America and Asia/Pacific. Compared with its Magic Quadrant Leader peers, ADOIT received relatively few mentions in over 1,000 EA-tools-related inquiries with end-user clients assessed during the research evaluation period.

- **Multiproduct feature fragmentation:** BOC Group continues to spread resources across its product portfolio, which spans three distinct yet interconnected domains: enterprise architecture (ADOIT); business process management (ADONIS); and governance, risk, and compliance (ADOGRC). In an increasingly competitive EA tools market, having feature sets unified in a single product has taken on added significance. While customers undertaking full-scope enterprise architecture initiatives may leverage basic BPM and GRC functionalities in ADOIT, accessing more advanced BPM or GRC features requires investing in BOC Group's dedicated BPM and GRC products, which may be challenging for EA practices to fully utilize or justify.

GBTEC

GBTEC is a Challenger in this Magic Quadrant. Headquartered in Bochum, Germany, the company was founded as Global Business Transformation & Excellence Company in 2005 and has approximately 400 employees. Its EA product, BIC EAM — part of the BIC platform — can be delivered as a SaaS offering in both public and private cloud, or as an on-premises deployment. BIC EAM's pricing model is primarily based on a per-user charge, with supplementary product modules available at additional cost. Advanced AI capabilities are priced as modular, supplementary add-ons.

Strengths

- **Common data model across product portfolio:** GBTEC's BIC platform hosts a range of products that contain commonly sought-after EA-adjacent capabilities, including process design, process mining, and governance, risk and compliance. All of GBTEC's products are based on a common data model, allowing straightforward data exchange across adjacent disciplines.

- **Flexible and broad AI capabilities:** BIC EAM offers modular AI features — delivered through Arty, the AI assistant — that can be licensed individually. These provide organizations with the flexibility to select and invest in functionalities that align with their specific requirements. AI capabilities span the breadth of BIC EAM's feature set, including data management, document generation, chat-based summarization, and insight and recommendation generation based on repository data.

- **Modern user experience:** GBTEC's BIC platform features a shared user experience across its product suite, with a user interface that supports eight languages and native embedding of accessibility features. In a market where design elegance and intuitiveness are differentiators, the ability to deliver an interface that is readily accessible and usable

by nontechnical stakeholders has become an increasingly important selection criterion for prospective customers.

Cautions

- **Process and operations feature bias:** GBTEC's business has historically revolved around business process management and operational excellence. While the shared BIC platform offers native integration of its products, much of the EAM tool's user experience is built from a business operations perspective, which may not be intuitive for customers primarily interested in a tool to support their EA practice.

- **Limited presence outside Europe:** GBTEC's operations and customer base remain predominantly concentrated in Europe, with approximately 89% of full-time employees and 67% of customers in the region. Although GBTEC is actively pursuing international expansion through increased staffing and strategic partnerships, its presence outside Europe remains limited.

- **Immature EA capabilities:** Despite an ambitious product roadmap, BIC EAM is still a relatively new entry into the EA tools market and its full-scope EA capabilities are still developing. BIC EAM's innovation and sustainability management features are rudimentary compared with Leaders in this Magic Quadrant. Customers looking for more advanced EA features may find existing functionality sparse in the near term.

ins-pi

ins-pi is a Visionary in this Magic Quadrant. Headquartered in Cologne, Germany, the company was founded in 2015 and has approximately 30 employees. Its EA product, YouDesign, is built natively on the ServiceNow AI Platform and can be delivered as a SaaS offering in the public cloud or as an on-premises deployment. YouDesign's pricing model is primarily based on a flat annual subscription fee and a per-user charge, with supplementary product modules available at additional cost. Advanced AI capabilities — contingent on a separate ServiceNow license — are based on consumption-based pricing of Now Assists.

Strengths

- **Built on the ServiceNow platform:** YouDesign is built on — and natively integrates with — the broader ServiceNow platform. By leveraging and expanding ServiceNow's common service data model, workflows, and user interface, YouDesign provides live access to

ServiceNow data without connectors or integrations — a clear advantage for many customers in the EA tool market.

- **End-to-end adaptiveness:** ins-pi has remained nimble in the face of significant EA tool market disruption, introducing new licensing models for non-ServiceNow customers and completing a structural overhaul of YouDesign's user interface. ins-pi's product roadmap for YouDesign is intentionally dynamic, with significant influence and prioritization based on customer feedback.

- **Fast time to value:** ins-pi's Transformation Framework — used during customer onboarding — helps improve time to value for customers by facilitating the scoping, planning, and implementation of architecture. It has over 60 predefined capabilities and over 150 transformation-specific use cases, including fully defined data requirements and solution functionality descriptions.

Cautions

- **Unequal co-opetition with ServiceNow:** ins-pi is directly competing with ServiceNow's Enterprise Architecture module, while simultaneously cooperating as a certified build partner in the ServiceNow ecosystem. ins-pi and ServiceNow target a shared customer base with competing EA solutions, creating potential for channel conflict. This dynamic may present a significant challenge to ins-pi's business model, given its comparatively smaller size and specialized focus within the ServiceNow ecosystem.

- **Limited appeal for non-ServiceNow users:** Most of ins-pi's differentiating features are contingent on having an active ServiceNow contract, which provides live access to ServiceNow data and use of native ServiceNow integrations. Although ins-pi has introduced its "Platform Complete" license — geared toward organizations without ServiceNow — it remains unclear how differentiated YouDesign is without the data synergy associated with the ServiceNow platform.

- **Lacking presence in emerging markets:** ins-pi has no customers in Latin America and has a minimal amount of customers in the Asia/Pacific region. Organizations in these regions are increasingly interested in EA tools, and ins-pi's absence may hinder its ability to capitalize on rising demand in these emerging geographies.

Orbus Software

Orbus Software is a Leader in this Magic Quadrant. Headquartered in London, United Kingdom, the company was founded in 2004 and has approximately 280 employees. Its EA product, OrbusInfinity, is delivered exclusively as a SaaS offering in the public cloud. OrbusInfinity's pricing model is primarily based on a per-user charge and a general-use platform fee, with supplemental solution modules available at additional cost. Advanced AI capabilities are complimentary as part of OrbusInfinity's platform fee, but token usage is capped per customer.

Orbus Software acquired Capsifi in December 2024 and has incorporated select Capsifi features into the OrbusInfinity platform, offered as the Business Architecture (formerly Capsifi) solution. Specific Capsifi features that have not been incorporated are those for which OrbusInfinity already provides equal or superior capability.

Strengths

- **Comprehensive business architecture capabilities:** With Orbus's acquisition of Capsifi, OrbusInfinity now offers some of the most comprehensive business architecture capabilities in the market. Customers can leverage OrbusInfinity's Business Architecture (formerly Capsifi) solution, with features such as value trees, value streams with related business capability heatmaps, skills gap analysis, objectives and key results progress tracking, and capability maps augmented by its capability model generator.

- **Expansive AI support:** Orbus has expanded its support for AI, allowing customers to leverage increased automation and intelligent decision making. OrbusInfinity offers integration via its Flow iPaaS to numerous third-party AI solutions, allowing features such as AI-enabled queries. AI capabilities also include automatically checking solution designs for alignment with security standards, and mapping project principles and goals to associated risks. Additionally, an AI governance agent is available to flag projects that leverage AI, ensuring they are reviewed by the appropriate AI governance group.

- **Direct integration with Microsoft 365:** OrbusInfinity natively integrates with Microsoft Teams, SharePoint, Visio, Word, Excel, Power BI, and Power Automate to create diagrams, documents, and reports in OrbusInfinity. Previously, storing Visio diagrams generated in OrbusInfinity required a SharePoint license; however, the platform's built-in Draw feature now allows users to create and manage diagrams independently of both SharePoint and Visio.

Cautions

- **Post-acquisition product uncertainty:** Orbus' plans for integrating and evolving its products after acquiring Capsifi remain unclear. Orbus has incorporated select Capsifi functionalities into OrbusInfinity's Business Architecture (formerly Capsifi) solution, while also offering Capsifi Jalapeno as a standalone product for select deals. Because OrbusInfinity and Capsifi have different codebases and user experiences — and Orbus does not intend to reengineer Capsifi's interface — managing both products adds administrative complexity and may lead to an inconsistent user experience when switching between them.

- **Continued customer dependence on professional services:** Nearly half of all Orbus customers have opted for paid post-implementation professional services, while all customers acquired in the past year have used paid professional services for onboarding. While customers commonly leverage professional services for software implementations and ongoing support, OrbusInfinity customers' usage rate of these services is among the highest in the EA tools market. Prospective customers should assess their potential need for additional services and include these costs in their planning.

- **Limited language support:** OrbusInfinity is one of the few products in this year's Magic Quadrant that only supports English in its primary user interface, although integrated Microsoft 365 components (SharePoint, Power BI, etc.) support multiple languages. Customers with numerous architects who require non-English interfaces, especially frequent users, should evaluate whether this English-centric platform aligns with their requirements.

QualiWare

QualiWare is a Visionary in this Magic Quadrant. Headquartered in Farum, Denmark, the company was founded in 1991 and has approximately 60 employees. Its EA product, QualiWare X, can be delivered as a SaaS offering in both public and private cloud, or as an on-premises deployment. QualiWare X's pricing model is primarily based on a per-user charge, with supplementary product add-ons available at additional costs. Access to advanced AI capabilities is included in the cost of the QualiWare X license, but customers are required to bring their organization's AI API key(s).

Strengths

- **Enduring customer loyalty:** QualiWare's average lifetime customer contract duration is 15 years — the longest in the EA tools market. QualiWare has also indicated it retained 100%

of its customer base in the last 12 months, a rare achievement in a market rife with customer churn.

- **Intentional focus on regulatory compliance:** QualiWare has invested considerable resources into supporting evolving standards like CSRD, CRA, and DORA. QualiWare X contains out-of-the-box compliance matrices and analyses, with the ability to track relevance and impact of anticipated changes. QualiWare X also has dedicated visualization dashboards that support audit-focused personas.

- **Proactive innovation:** QualiWare devotes half of its overall revenue to product development and research. It has been a consistent early adopter of emerging technologies, such as augmented reality and agentic AI, while pioneering complex regulatory compliance solutions. QualiWare also provides full support for EDGY — an open-source tool for collaborative enterprise design.

Cautions

- **Plateaued growth:** Despite QualiWare's strong customer retention and long lifetime customer contracts, its customer growth rate was among the lowest in the EA tools market. Additionally, its overall revenue growth was nearly flat in the latest fiscal year compared with the previous year. Continued growth stagnation over multiple years suggests persistent challenges in expanding QualiWare's footprint amid intensifying competition in the EA tools market.

- **On-premises reliance amid market shift:** While QualiWare's cloud-based offerings are gaining traction among its newer customers, over 90% of its existing customer base continues to rely on on-premises deployments. Although QualiWare maintains that its on-premises optionality is strategic and it does not force on-premises customers to migrate, client demand for on-premises solutions has continued to decline across the EA tools market.

- **Customer dependence on professional services:** Nearly 90% of QualiWare customers have opted for paid post-implementation professional services, and all new customers leverage paid professional services from QualiWare or its partners. While customers commonly leverage professional services for software implementations and ongoing support, QualiWare X customers' usage rate of these services is the highest in the EA tools market. Prospective customers should assess their potential need for additional services and include these costs in their planning.

SAP LeanIX

SAP LeanIX is a Leader in this Magic Quadrant. Headquartered in Bonn, Germany, the company was founded in 2012 and has approximately 810 employees. LeanIX was acquired in 2023 by SAP, a Walldorf, Germany-based company founded in 1972 with approximately 109,000 employees. SAP LeanIX's eponymous EA product — independent from the SAP Business Technology Platform — is delivered exclusively as a SaaS offering. SAP LeanIX's pricing model is primarily based on a per-application count, with supplementary product modules available at additional cost. Advanced AI capabilities are subject to separate consumption-based pricing of SAP AI Units.

Strengths

- **Comprehensive growth surge:** SAP LeanIX has continued to generate notable revenue increases and has exponentially increased its reseller and certified partner network as part of SAP's PartnerEdge program. Since last year's Magic Quadrant, SAP LeanIX has nearly doubled its dedicated product development team, which was already the largest in the market. SAP LeanIX won the most unique customer organizations (relative to its peers) and maintained a high customer retention rate during this evaluation.

- **Exemplary product support:** SAP LeanIX offers the market's most comprehensive customer success program — which includes onboarding, success roadmapping, integration, and engineering support — at no additional cost. Its customers have the lowest utilization of paid professional services among its competitors, which is rare in the EA tools market, where extensive use of such services is typical. This suggests that SAP LeanIX customers are able to rely primarily on the complimentary onboarding and support services.

- **Accelerated repository setup:** SAP LeanIX contains a range of features to quicken and simplify repository setup. Its AI-powered Inventory Builder feature extracts objects, relationships, and attributes from diagrams or static images and creates application fact sheets within the repository. Leveraging integrations with an organization's cloud security and access management solutions, the SaaS discovery feature provides a streamlined way to identify, add, or link SaaS applications to the repository. The SAP Landscape Discovery feature can also identify, add, or link on-premises and cloud-based SAP services to the repository.

Cautions

- **SAP-related dilution and fragmentation risks:** SAP LeanIX's product roadmap dedicates 30% of planned developments to SAP-specific features. 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 adjacent SAP products such as SAP Signavio. Prospective customers should carefully evaluate their organization's existing and planned investments in SAP products to maximize potential synergies or minimize potential capability gaps.

- **Pricing model may constrain EA scope:** Pricing for SAP LeanIX is primarily based on the number of applications, in graduated tranches of 100, with a 100-application minimum. For organizations with large application portfolios or those seeking holistic enterprise architecture coverage, this pricing model can become cost-prohibitive. This may result in selective or incomplete application visibility, reducing the overall value of SAP LeanIX for large-scale initiatives. SAP LeanIX's definition of an "application" is subject to change, and may result in unexpected costs or adjustments during contract renewals.

- **Future-state features cost extra:** SAP LeanIX's flagship module — LeanIX Application Portfolio Management — primarily supports application portfolio management capabilities and omits forward-looking functionalities often found in competitors' base offerings. EA practices looking to model the future-state, create roadmaps, conduct scenario analysis, and analyze dependencies will need to purchase additional product modules.

ServiceNow

ServiceNow is a Challenger in this Magic Quadrant. Headquartered in Santa Clara, California, the company was founded in 2003 and has approximately 27,000 employees. ServiceNow Enterprise Architecture is a product within — and dependent on — the ServiceNow AI Platform, and can be delivered as a SaaS offering in the public cloud or as an on-premises deployment. ServiceNow Enterprise Architecture's pricing model is primarily based on a per-business application count or number of unrestricted users, depending on the specific EA product package. Advanced AI capabilities are subject to separate consumption-based pricing of Now Assists.

Strengths

- **ServiceNow platform synergy:** ServiceNow Enterprise Architecture natively integrates with the broader ServiceNow platform, streamlining data classification via a common service data model. Organizations do not need to build or maintain separate integrations

to ingest real-time ServiceNow data into their EA tool — a common requirement in this market.

- **Path to democratized enterprise architecture:** ServiceNow's prevalence in business and IT functions means that employees beyond EA are likely familiar with the broader ServiceNow platform. This lowers barriers to participating in and contributing to EA activities, addressing what is often the most challenging aspect of successfully leveraging an EA tool — consistent stakeholder engagement.

- **Vibrant peer community:** ServiceNow has a large global community of customers, partners, and practitioners, connected through user groups, conferences, and a robust online ecosystem. In contrast to many EA tool-related communities and forums, which are often small or inactive, ServiceNow's peer network offers architects extensive opportunities for peer learning, sharing best practices, and early access to product innovations.

Cautions

- **Extensive ServiceNow investment required for full value:** ServiceNow Enterprise Architecture's full value proposition is reliant on integrations with other ServiceNow products — such as IT Service Management (ITSM), IT Operations Management (ITOM), and IT Asset Management (ITAM) — beyond the core platform and configuration management database (CMDB). Purchasing and successfully leveraging these products in unison requires significant enterprisewide investment and coordination. Prospective customers should consider the breadth of additional products and internal resources needed to fully derive value from ServiceNow Enterprise Architecture.

- **Base product package lacks foundational EA features:** ServiceNow's Enterprise Architecture Standard package prioritizes application portfolio management, but omits core features such as modeling, roadmapping, business capability modeling, and technology portfolio management, which other vendors evaluated in this Magic Quadrant often include in their base offerings. These features are available at an additional cost in the Enterprise Architecture Professional and Strategic Enterprise Architecture Suite packages.

- **Unknown product evolution and future packaging:** ServiceNow Enterprise Architecture is a nascent product, with a broad roadmap mostly focused on commoditized EA features. With over 180 ServiceNow products, it is unclear whether future EA functionalities will be included within ServiceNow Enterprise Architecture or split into its adjacent products —

like Strategic Portfolio Management (SPM) or Integrated Risk Management (IRM). This will potentially require customers to purchase additional product packages.

Sparx Systems

Sparx Systems is a Niche Player in this Magic Quadrant. Headquartered in Creswick, Australia, the company was founded in 1996 and has approximately 125 employees. Its EA solution is anchored by its primary EA product, Enterprise Architect, with two supporting products: Prolaborate, a cloud-based collaboration platform; and Pro Cloud Server, a remote work management platform. Sparx Systems' solutions can be delivered as a combination of SaaS in both public and private cloud, and as on-premises deployments. Enterprise Architect and Prolaborate's pricing models are primarily based on a per-user charge, while Pro Cloud Server is priced per-server, per-year. Basic AI capabilities are included in the Enterprise license, but require customers to use their organization's AI API key(s).

Strengths

- **Extensive modeling and framework focus:** Sparx Systems has prioritized deep modeling functionality for enterprise, solution, and software architecture, along with business process and data modeling. It also supports a comprehensive range of out-of-the-box EA, IT, software-related, and industry-specific frameworks.

- **Vast and fervent user base:** Enterprise Architect is an iconic tool in this market, with over one million cumulative users since its commercial release in 2000. Many users, both past and present, continue to show constant engagement in online forums and communities for the product, highlighting its status as an industry stalwart for modeling.

- **Transparent and economical pricing:** Sparx Systems offers clear, transparent pricing that is readily accessible on its website. Its EA solution's pricing structure is designed to support organizations of all sizes and levels of maturity. Additionally, Sparx Systems' prices are significantly lower than the majority of its competitors in this market.

Cautions

- **Steep and daunting learning curve:** Sparx Systems has continued to focus on product functionality, while many of its market peers have prioritized more intuitive user experiences and interfaces — for both architects and stakeholders. Enterprise Architect is commonly regarded as an enthusiast's tool, favored by diehard architects dedicated to

the art of architecture, often demanding a long runway for product mastery and effective utilization.

- **Lacking product vision and strategy:** Sparx Systems lacks an ambitious, forward-looking product vision, with recent and planned roadmap items reflecting only incremental improvements. During this evaluation, Sparx Systems did not meaningfully demonstrate a coherent product strategy, raising concerns about its ability to stay relevant as the discipline of enterprise architecture evolves.

- **Lagging cloud adoption:** Despite significant investments in its cloud-based supplementary products, such as Prolaborate and Pro Cloud Server, over 98% of Sparx Systems' customers continue to use on-premises deployments. This cloud adoption rate remains exceptionally low compared with its market peers, which may reflect customer trepidation or possible gaps in the value proposition of Sparx Systems' cloud-based products.

UNICOM Systems

UNICOM Systems is a Niche Player in this Magic Quadrant. Headquartered in Mission Hills, California, the company was founded in 1981 and has approximately 1,000 employees. Its EA product, System Architect, can be delivered in the public and private cloud or as an on-premises deployment. System Architect's pricing model is primarily based on a per-user charge, with supplemental product add-ons available at additional cost. Basic AI capabilities are complimentary in its eXtended Teams (XT) pricing plan.

Strengths

- **Established product with a trusted provider:** UNICOM sees longer contract terms and larger deal sizes than most competitors. With some of the lowest staff turnover in this market, customers benefit from consistent expertise. Additionally, System Architect customers spend less on professional services than the customers of most competitors, suggesting the free, included support is sufficient.

- **Robust reporting capabilities:** System Architect offers extensive tools for creating reports and dashboards. Its advanced information-sharing features and integrated reporting engine enable users to efficiently generate reports and export them to HTML or PDF formats. System Architect Publisher and XT can leverage these HTML outputs to create and publish websites, enhancing accessibility and collaboration.

- **ERP metadata discovery:** With UNICOM System Architect's SA/ERP add-in, customers can extract key metadata from ERP systems, including SAP, Oracle (E-Business Suite, PeopleSoft, and Siebel), and JD Edwards. Once extracted, customers can decide which metadata to import into System Architect for data modeling. Additionally, customers can compare versions of ERP implementations to help conduct impact analysis and future-state architecture definition.

Cautions

- **Legacy technology constraints:** System Architect is built on dated technology with an aging user interface. As customer demand shifts toward AI-related features and more holistic collaboration, System Architect's product architecture will make it more difficult to incorporate enhancements. While UNICOM continues to invest in its comparatively modern web-based extension, System Architect XT, it requires UNICOM to expend additional resources and effort across different codebases and interfaces. This may result in slower delivery of planned enhancements, relative to competitors with more modern or unified platforms.

- **Asset sweating risk:** During the evaluation period, System Architect's product roadmap consisted mostly of minor enhancements, several of which remained identical to the previous year's roadmap items. Many of System Architect's planned feature releases are scheduled on a considerably longer timeline than those of its competitors. Combined, these observations suggest that UNICOM is relying on the returns from an established product rather than prioritizing product innovation to expand its market share.

- **Technical prowess over business value:** UNICOM continues to focus on technical architecture at a time when many enterprise architecture practices are shifting to business-outcome-driven EA and internal consultancies. While its SysML improvements may be useful for technical architects and mechanical engineers, there are limited enhancements on the horizon related to business architecture. Customers should evaluate UNICOM System Architect against the architecture disciplines they plan to prioritize over the next several years.

ValueBlue

ValueBlue is a Visionary in this Magic Quadrant. Headquartered in Utrecht, Netherlands, the company was founded in 2011 and has approximately 90 employees. Its EA product, BlueDolphin, is delivered exclusively as a SaaS offering. BlueDolphin's pricing model is

primarily based on a per-user charge, with supplemental product add-ons available at additional cost. Basic AI capabilities are available — on request — free of charge.

Strengths

- **Ambitious product-led growth strategy:** ValueBlue is shifting to a product-led growth strategy and is beginning to offer time-bound free trials of BlueDolphin. This will allow prospective customers to sign up for free and explore BlueDolphin using self-guided onboarding. By reducing the friction-prone process of accessing and administering hands-on demos — a common issue in the EA tools market — ValueBlue will allow prospects to experience BlueDolphin firsthand before considering a paid plan.

- **Modern infrastructure and streamlined design:** In a market still teeming with monolithic product architectures, BlueDolphin is built on a cloud-native infrastructure that combines microservices and Kubernetes to deliver reliable performance and scalability. BlueDolphin maintains a unified and simplified user interface to sidestep the complexity associated with having multiple views for different stakeholders.

- **Prioritized user input for enhancements:** ValueBlue has been quick to incorporate urgent user feedback and has pivoted BlueDolphin's product roadmap on numerous occasions to include out-of-the-box bidirectional ITSM/CMDB integrations and bulk metadata editing. ValueBlue also hosts recurring "user days" to present ongoing developments, interpret feedback, and source input from its users.

Cautions

- **Simplicity over breadth of features:** While ValueBlue's commitment to product simplicity results in a streamlined and user-friendly experience, this comes at the expense of a broader range of functionalities. Although this is an intentional choice by ValueBlue, prospective customers should ensure their current and future use cases can be sufficiently fulfilled with existing and planned BlueDolphin functionality.

- **Limited traction outside Europe:** Only a small portion of ValueBlue's customer base is located outside of Europe, with no customers located in Latin America. Although ValueBlue has been prioritizing its growth efforts in North America, its conversion rates — after a prospect engages in a hands-on demo — remain well below its market peers. This low conversion rate, combined with the company's predominantly European customer base, suggests that ValueBlue may still be struggling to adapt its sales approach to the needs and expectations of the North American market.

- **Revenue growth deceleration:** While ValueBlue continues to increase its overall revenue and improve its profit margins, its rate of revenue growth continues to drop — a notable trend for a vendor of its size and stage. This deceleration suggests that recent investments in product development are not yet translating into commercial momentum. Given that ValueBlue's total revenue remains lower than most of its market peers, this pattern may indicate a need to strengthen the connection between innovation and sales execution.

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

- GBTEC

- ServiceNow

- Sparx Systems

Dropped

- Capsifi was acquired by Orbus Software in December 2024. It is no longer an independent corporate entity and therefore has been dropped.

- Enterprise Architecture Solutions (EAS) no longer met the inclusion criteria for year-over-year revenue growth and therefore has been dropped.

- MEGA International was acquired by Bizzdesign in September 2024. It is no longer an independent corporate entity and therefore has been dropped.

- North Highland no longer met the inclusion criteria for EA-tool-specific unique customer count and total EA-tool-specific overall revenue and therefore has been dropped.

- Software AG's EA product — Alfabet — was acquired by Bizzdesign in January 2025. Software AG no longer has an EA tool product and therefore has been dropped.

Inclusion and Exclusion Criteria

The inclusion criteria represent the specific attributes that Gartner analysts believe are necessary for inclusion in this research. To properly evaluate the evolving EA tools market, analysts have expanded the inclusion options available for organizations.

For this year's inclusion criteria, participating vendors were able to classify their EA tool submissions as only one of the following archetypes:

Single product, single codebase: Refers to software acquired under one license, using the same code base and repository, not requiring any customized integration to access and exchange data. Such a product may include multiple modules or features, which can be accessed based on different pricing tiers within the same license.

Single solution, multi-codebase: Refers to software acquired under one or more licenses, using different codebases and a singular repository. Any additional features that augment collaboration, access, integration, or data must be developed exclusively for the primary EA tool component. Such a solution may include multiple modules or features, which can be accessed based on different pricing tiers across multiple licenses.

If a vendor's solution consists of capabilities from different codebases, that vendor will only be included if its solution meets **all** of the following criteria:

- Has predefined workflow integrations.

- Uses vendor-supported integration technologies that are maintained exclusively by the participating vendor.

- Any supplemental components are exclusively designed to augment the primary EA tool component.

- The solution is overtly marketed and used as an EA tool.

Suite of standalone products

Refers to multiple software products, using multiple codebases and repositories. If a vendor

puts forth multiple products, the vendor (and its products) will only be included if they meet **all** of the following criteria:

- Each product is independently capable of meeting all dimensions of inclusion criteria.

- Each product independently possesses all eight mandatory critical capability features and at least three common critical capability features.

- Each product is overtly marketed and used as an EA tool.

To qualify for inclusion in this Magic Quadrant, vendors and their **EA tool submission** must meet all the criteria set forth across the following three dimensions.

Dimension 1: Performance Threshold

To demonstrate sufficient performance, the vendor's **EA tool submission** must meet **one** of the following criteria:

- **Total licensing revenue:** Achieved at least $8 million in licensing revenue for the vendor's **EA tool submission** in the last fiscal year (2024-2025).
  or

- **License revenue growth:** Achieved at least 30% year-over-year license revenue growth for the vendor's **EA tool submission** in the last three calendar years.

  - License revenue includes software license and software maintenance, as well as software upgrade revenue for higher tiers of the vendor's **EA tool submission** (such as additional functionalities, modules), but excludes hardware, customer support, and professional services.

Dimension 2: Market Momentum Threshold

To demonstrate sufficient market momentum for the vendor's **EA tool submission** between 2 April 2024 and 2 April 2025, the vendor needs to achieve the following:

- Secure a total of at least 20 net new customer acquisitions, with at least 10 net new logos in two of the four major geographic regions:

  - North America

  - Europe, the Middle East, and Africa

- Asia/Pacific

- Latin America

These customer acquisitions must primarily involve the vendor's **EA tool submission** being actively used in production.

Dimension 3: Market Focus Threshold

To qualify for inclusion, as of **2 April 2025,** the vendor's **EA tool submission** must have **all** of the following:

- An installed base of **at least 100** customers (unique logos) who use the vendor's **EA tool submission** in production

- **General availability** as of **2 April 2025,** for the vendor's **EA tool submission**

- The vendor's **EA tool submission** demonstrably supports:

  - All five Critical Capability use cases as defined in the context section of this research

  - All eight of the **mandatory** features as defined in Critical Capabilities for Enterprise Architecture Tools

  - At least three of the **common** features as defined in Critical Capabilities for Enterprise Architecture Tools

Honorable Mentions

Enterprise Architecture Solutions

Enterprise Architecture Solutions (EAS), headquartered in London, United Kingdom, offers two EA product options: Essential Cloud, a fixed-price platform with unlimited users; and Essential Open Source, a free, downloadable open-source solution. EAS was previously a Visionary in the 2024 Magic Quadrant for Enterprise Architecture Tools, but was dropped from this year's Magic Quadrant after no longer meeting the inclusion criteria for either performance threshold, although it continued to satisfy the market momentum and market focus thresholds.

Evaluation Criteria

Ability to Execute

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

Product or service: Analysts assessed how and what the vendor's EA tool offers EA practitioners. This includes current product/service capabilities (including differentiating capabilities), as well as 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. Analysts assessed products to determine how well they met the critical capabilities and supported the use cases.

Overall viability: Analysts 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 includes our assessment of the likelihood that the vendor will continue to offer and invest in the product (R&D, sales, vertical and regional strategies, etc.), as well as advance the product's position within its current product portfolio. Analysts compared organic growth to growth by other means, including growth by acquisition or by securing additional funding. Analysts value organic growth more highly than other types of growth.

Sales execution/pricing: Analysts 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: Analysts 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. Analysts also examined each vendor's recent track record in the field.

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

Operations: Analysts 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.

Table 1: Ability to Execute Evaluation Criteria

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

Evaluation Criteria	Weighting

Completeness of Vision

Market understanding: Analysts assessed each vendor's understanding of the market dynamics — including trends, competitor activity, customer needs, and emerging use case 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 tha listen, understand customer demands, and can shape or enhance market changes with the added vision.

Marketing strategy: Analysts 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 strategies based on regions, specific countries, and buyer personas, as well as ways to measure and adapt the strategies.

Sales strategy: Analysts wanted to understand the vendor's sales strategy and how it leveraged direct and indirect sales, marketing, service, and communication. Analysts 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: Analysts 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: Analyst 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: Analysts 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: Analysts explored the vendor's innovation vision, considering its resources, expertise, and capital for investment. Analysts looked for a strong product vision that pushes the market forward while considering the disruptive and opportunistic forces of digital on businesses. Analysts also considered the vendor's ideas for innovation and future development of the market.

Geographic strategy: Analysts 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.

Table 2: Completeness of Vision Evaluation Criteria

Evaluation Criteria	*Weighting*
Market Understanding	Medium
Marketing Strategy	High
Sales Strategy	High
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Low
Innovation	High
Geographic Strategy	Low

Source: Gartner (October 2025)

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 broad level. Leaders are generally 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 score will not necessarily have a high Magic Quadrant position. This is because the Magic Quadrant evaluation focuses on the Ability to Execute and Completeness of Vision, informed by 15 dimensions, out of which only two dimensions are product-related.

Six vendors are designated as Leaders in the Magic Quadrant for Enterprise Architecture Tools this year, and have sustained excellence in both execution and vision long enough to demonstrate effective leadership.

Customers should note that a Leader is not always the best choice. A focused, smaller vendor can also 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.

Two vendors are designated as Challengers in the Magic Quadrant for Enterprise Architecture Tools this year.

Although Challengers are typically of significant size with significant financial resources, they may lack elements of the vision analysts 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. Small companies may shift from Challengers to Visionaries if their increasingly innovative strategies do not translate into additional growth or market share.

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.

Three vendors are designated as Visionaries in the Magic Quadrant for Enterprise Architecture Tools this year.

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.

Three vendors are designated as Niche Players in the Magic Quadrant for Enterprise Architecture Tools this year.

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 may be 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 and market dynamics, analysts adjust the weight of different evaluation criteria to accurately reflect the state of the market.

As part of Gartner's evaluation process, analysts used five key use cases that they believe are important to EA practices, 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:** EA 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:** EA 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:** EA practitioners need to be able to efficiently design and communicate strategic, tactical, and emergent solution architecture that is aligned with 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:** EA 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

Over the past year, the enterprise architecture (EA) tools market has undergone significant transformation, characterized by a series of strategic mergers, acquisitions, consolidations, and the entry of several new well-resourced vendors. This dynamic shift has attracted heightened attention from EA practitioners, private equity and venture capital firms, and adjacent IT software vendors, all keen to capitalize on the evolving landscape.

As IT estates grow more complex and business environments become more volatile, EA tools are increasingly viewed as essential investments by the C-suite. Despite their perceived necessity, EA tools — and the practitioners that use them — continue to face challenges related to integration, sustained adoption, and demonstrating tangible impact on business outcomes.

Because enterprise architecture is not a standardized discipline, practitioner needs are fragmented across a myriad of activities and use cases that often overlap with adjacent software markets, such as:

- Application portfolio management

- Business intelligence

- Business process management

- Data modeling

- Digital twin of an organization

- Enterprise business process analysis

- Financial planning

- Governance, risk and compliance

- Modeling and diagramming

- Project and portfolio management

- Roadmapping and planning

- Strategic portfolio management

- Technology portfolio management

- Third-party risk management

Both vendors and practitioners face formidable challenges. Vendors are confronted with the strategic dilemma of whether to offer a broad range of functionalities, risking complexity and dilution of focus, or streamline their features, potentially limiting their total addressable market. Concurrently, practitioners must choose and justify tools that align with their immediate needs, without being able to predict if tools will evolve in tandem with their organization's unique — and often turbulent — enterprise architecture strategy. This situation creates a complex decision-making landscape for vendors and practitioners alike.

A notable trend in this evolving market is the accelerated growth in revenue and customer base among larger EA tool vendors, often outpacing — and at the expense of — their smaller competitors. Larger, more well-resourced vendors are better positioned to invest in product innovation, develop polished marketing campaigns, attend, sponsor, or host well-known industry events, support complex deployments, and meet the sophisticated requirements of global organizations. Additionally, larger vendors are generally able to offer greater leeway in product pricing and feature bundling, whereas smaller vendors are typically limited to

providing flexibility primarily through their support offerings.

To remain competitive in this challenging environment, smaller vendors should focus on leveraging their agility and personalized service to differentiate themselves. By developing solutions tailored to specific customer needs or industry segments, they can carve out unique market positions that larger vendors may overlook.

The EA tools market has witnessed a series of significant developments in the past year:

- In September 2024, Ardoq acquired ShiftX, a process mapping, management, and runtime tool.

- In September 2024, Ardoq and Celonis announced the launch of a joint solution for business transformation, leveraging the process mining and intelligence capabilities of Celonis, coupled with the EA capabilities in Ardoq.

- In September 2024, Bizzdesign acquired MEGA International. Then, in January 2025, it announced the acquisition of Software AG's Alfabet product. Bizzdesign has publicly committed to supporting its three standalone EA tools — Alfabet, HOPEX, and Horizzon — for the next five to seven years.

- In September 2024, ServiceNow formally rebranded its Application Portfolio Management product as its Enterprise Architecture product.

- In December 2024, Orbus Software acquired Capsifi and began integrating parts of Capsifi's feature set into OrbusInfinity's Business Architecture solution.

- In December 2024, Avolution announced a strategic growth investment from private equity firm Whiteoak. Subsequently, in January 2025, Avolution appointed a new CEO as part of this investment initiative. A further CEO transition took place in October 2025.

- In May 2025, Bizzdesign announced a new product under development — Bizzdesign Unify. Bizzdesign Unify is being marketed as a transformation collaboration tool, aiming to bridge long-standing gaps between EA tools, diagramming and modeling tools, and enterprise business platforms.

Acronym Key and Glossary Terms

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.
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.

⊕ Evaluation Criteria Definitions

Gartner.

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