

Magic Quadrant for Enterprise Low-Code Application Platforms

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Software engineering teams struggle with delivery speed, legacy complexity and integration demands. Enterprise LCAPs address these challenges by streamlining development with AI-assisted tooling, composable architectures and built-in governance to accelerate secure, scalable application delivery.

Strategic Planning Assumption

By the close of 2028, Agentic AI will be implemented via enterprise LCAPs in four out of five businesses globally.

Market Definition/Description

Gartner defines enterprise low-code application platforms (LCAPs) as software platforms for the accelerated development and maintenance of applications, using model-driven development tools, generative AI and prebuilt component catalogs for the entire application's technology stack. Enterprise LCAP features include support for the collaborative development of all application components; runtime environments for high performance, availability and scalability of applications; and application deployment and monitoring with detailed usage insights. Enterprise LCAP platforms feature governance controls and insights, self-service capabilities, APIs for integration with external DevOps tooling, success management with exhaustive technical documentation, training programs and a comprehensive global partner network.

Enterprise LCAPs provide the foundation for developing a wide range of applications and application components with distributed data architectures, including complex multimodal front ends, business workflows, agentic AI and integration capabilities.

The enterprise LCAP market is closely related to the citizen application development platform (CADP) market, as they both aim to address the use cases listed below. However, they are distinctively different in terms of the target audience and complexity of the applications built on the platform.

The most popular use cases include:

- **Line-of-business software development for both back- and front-office applications.** Enterprise LCAPs can scale from small businesses to global enterprises. They can handle any use case if business and technology stakeholders formulate requirements that account for the strengths and weaknesses of the low-code/no-code abstractions.
- **Modernization and augmentation of legacy business applications.** Replacing legacy applications or extending their functionality is usually an expensive, lengthy and risky undertaking. Enterprise LCAPs aim to accelerate the delivery of new implementations, improve cost controls and better mitigate the risks associated with modernization initiatives.
- **Development of applications to support internal company processes and digital workplaces.** Enterprise LCAPs can also be used outside IT departments with moderate IT supervision and governance to tackle simple and narrow use cases for internal company process automation, reporting, data visualization and simple integration scenarios.

Mandatory Features

The mandatory features for the enterprise LCAP market include:

- Visual development tools and integrated development environments (IDEs) to support minimal coding or scripting and create applications, including internal data storage or connectors, user interfaces for web and mobile channels, process automation, and business rules.
- Data virtualization capabilities to support the creation, maintenance, efficient use and governance of complex distributed data architectures, relying on internal and external data sources.

- AI-assisted development features that can generate, modify and optimize application components like complex UIs, application logic and business rules, process models, data structures, integration connectors, and other assets required for application composition.
- Full self-service capabilities and technical documentation for development, IT operations, security and compliance, allowing platform deployment, customization and maintenance without establishing direct contact with the provider or implementation partner.
- Extensibility through component catalogs, scripting and traditional code-based software development kits (SDKs).
- Security features to protect the platform and applications built on the platform with identity and access management (IAM), as well as threat protection and enforcement of compliance policies.
- An integrated runtime environment for applications created with the platform's developer tools.

Common Features

The common features for this market include:

- Support for every stage of the software development life cycle, including deployment to multiple environments and observability, as well as governance controls like data and application access, change management and environment-specific policies.
- A collaborative development environment with versioning and synchronization of changes from multiple developers working in parallel.
- Tools for the creation and maintenance of packaged business capabilities, such as shared business-specific APIs.
- Support for the inclusion of AI-powered functional components in end-user applications. These can be dynamic UIs with point-and-click and natural language processing, or unattended and interactive AI agents providing intelligent business capabilities.
- An extensible library of connectors for popular application platforms, business applications and database management systems.
- Internal implementation of design systems or integration with external design systems.

- Support for modern architectures like event-driven and streaming architectures, microservices architectures and micro front ends.
- Support for integration with external test management and test automation tools, or inbuilt test automation tooling.
- Support for the development of native or “cross-platform-native” mobile apps that deploy to public or company internal app stores.
- Enablement of platform usage for B2B and independent software vendor (ISV) use cases, with support for client multitenancy and revenue-sharing agreements.

Magic Quadrant

Figure 1: Magic Quadrant for Enterprise Low-Code Application Platforms





Gartner.

Vendor Strengths and Cautions

Appian

Appian is a Leader in this Magic Quadrant. Its Appian Platform includes Appian Designer for visual development, Data Fabric for unified connectivity, Process Modeler for automation, AI Copilot for GenAI support and Agent Studio for AI agent life cycle management. It supports on-premises, SaaS (multitenant or virtual private cloud) and hybrid deployments. Appian serves a global base, primarily large organizations in banking, finance and government. Recent updates include AI-assisted development, enhanced AI Skill Designer for no-code agent creation and Data Fabric integration with KPIs reporting for business analytics.

Strengths

- **Customer experience:** Appian has a global network of over 300 delivery partners and has trained thousands of customer and partner employees in the past 12 months, illustrating a strong support network. Additionally, Appian supports customer success with extensive training programs through Appian Academy and robust documentation and self-service capabilities.
- **Platform operations:** Appian delivers end-to-end observability with unified dashboards that aggregate performance, security, SLA, usage and infrastructure metrics, complete with drill-downs, real-time logging and DevOps pipeline integration. Automated alerting and AI-assisted remediation improve system resilience while built-in upgrade assistance through its Kubernetes-native, cloud-ready infrastructure helps with version updates and high availability.
- **Geographic strategy:** Appian maintains a streamlined network of premier global system integrator (GSI) partners in 2025 to target strategic markets to support implementations. The company operates direct sales and support offices across North America, Latin America, Europe, the Middle East/Africa, Asia/Pacific (excluding China and Russia) and Japan, with its top-tier GSI partners driving customer growth in India and Australia.

Cautions

- **Sales execution:** Although Appian's base pricing has remained flat for the past year, many new features are only available at the Advanced and Premium pricing tiers. Customers currently at the Standard pricing tier should budget for an upgrade if they want access to these features. Additionally, clients using the free Community Edition tier should be aware that free-tier upgrades to paid usage may require configuration and settings updates and could affect support and resource allocation.
- **Market responsiveness and track record:** According to Gartner client interactions, Appian has been slower than some of its peers in adopting AI orchestration and AI agents. Additionally, with platform and application governance ranking high on customers' roadmaps, customers should verify that Appian's upcoming releases sufficiently address governance and compliance needs to avoid gaps.
- **Platform governance:** Appian's governance framework provides basic application inventories, role-based access controls and built-in approval workflows. However, it falls behind some competitors in advanced dependency mapping and an AI-driven policy

engine, which affects change impact analysis and automation of compliance enforcement. Additionally, there is no dedicated generative AI (GenAI) governance tooling and a lack of a formal marketplace certification process for the AppMarket submission step.

Creatio

Creatio is a Niche Player in this Magic Quadrant. Its low-code application platform (LCAP) offering is Studio Creatio. It also provides dedicated solutions such as Marketing Creatio, Sales Creatio and Service Creatio focused on the CRM market. It can be deployed as a vendor-managed cloud service (PaaS) as well as on customer-managed infrastructure.

Creatio's operations are geographically distributed, with a presence among small and midsize enterprises in the EMEA and North America regions. Its major customers tend to be from the banking, finance, insurance, manufacturing and professional services sectors. Since 2024, Creatio has expanded its GenAI capabilities by adding Creatio.ai, which provides preconfigured AI skills and an AI command center to govern use of GenAI within the enterprise.

Strengths

- **Vertical/industry strategy:** Creatio's customers are spread across multiple industries, with the majority in banking, financial services and insurance, manufacturing and professional services. It is planning to launch prebuilt industry-specific solutions and AI agents tailored to specific tasks to solidify its presence across various industry verticals.
- **Sales execution/pricing:** Creatio has reported strong growth in the adoption of its LCAP across all regions, with higher growth in North America and Europe and modest expansion in Latin America and Asia/Pacific.
- **Market responsiveness:** Creatio has been quick to respond to the evolving needs of this market by not only adding AI-assisted development and AI skills but also adding an AI Command Center to enhance much-needed governance of GenAI adoption within enterprises.

Cautions

- **Market understanding:** Creatio focuses its go-to-market strategy primarily on enabling citizen developers to build enterprise applications using the Fusion Teams approach with no-code development. This does not fully align with the enterprise LCAP market, which

focuses on enabling IT leaders and software engineering teams to rapidly build business-critical applications.

- **Marketing execution:** Despite significant investments in events, content and expanding its partner network, compared with Leaders in this market, awareness of Creatio as an LCAP remains limited within Gartner clients.
- **Business model:** The majority of Creatio's customers are small and midsize enterprises. It is investing in expanding its partner network to grow its presence among large enterprises.

Mendix

Mendix, a Siemens business, is a Leader in this Magic Quadrant. Its Mendix Platform includes Studio Pro for visual modeling, Atlas UI with Figma integration for UX and Maia AI for GenAI development guidance. It supports deployment on Mendix Cloud (multitenant or dedicated), private cloud (AWS, Azure, Google Cloud Platform [GCP]), on-premises via Kubernetes or in hybrid environments. Mendix operates globally, serving mainly large enterprises in insurance, banking, manufacturing and the public sector. Following Siemens' acquisition of Altair Engineering, Mendix now integrates RapidMiner and Mendix AI (aka Maia) to enhance its AI capabilities.

Strengths

- **Market understanding:** Mendix's focus on core use cases such as legacy modernization, line-of-business automation and AI-driven hyperautomation ensures the platform addresses evolving customer needs. Its alliances with AWS, Snowflake and Microsoft give customers access to enterprise data and AI services, and its presence on multiple marketplaces (AWS, Azure, Snowflake) enables the development of intelligent, cloud-native applications at scale.
- **Offering (product) strategy:** Mendix focuses on embedding AI agents and GenAI-driven modules into its core platform, enabling users to incorporate intelligence and automation directly within their applications while maintaining policy controls through built-in governance tools. By using a subscription-based model with continual feature releases, Mendix allows organizations to adopt incremental improvements without large migrations, keeping deployments up to date and aligned with evolving business needs.
- **Developer tools:** Mendix's Studio Pro with the Maia AI assistant provides design and implementation suggestions, generates documentation and flags security issues with the

aim of helping teams produce applications with fewer errors. The command line interface/software development kit for custom widget and connector creation, along with built-in debugging, automated unit/UI testing, performance profiling and Git-based version control with CI/CD integration, supports extensibility, quality assurance and streamlined deployments.

Cautions

- **Sales strategy:** Mendix's engagement with channel partners and reliance on marketplace listings creates gaps in expertise availability and makes it harder for customers to find professional support in certain regions or verticals. Additionally, the complexity of its licensing tiers and the training requirements for partners may lead to delays or misalignment when implementing solutions.
- **Innovation:** Mendix's innovation roadmap heavily emphasizes AI and agentic development (e.g., Agentic IDE and AI-driven data and analytics), but these capabilities are still maturing and may not yet offer the stability or feature completeness some customers require. Additionally, their reliance on Siemens-sourced and external partnerships for emerging technologies could introduce integration complexity and dependency on third-party roadmaps.
- **Market responsiveness:** Mendix separates client-side (nanoflows) and server-side (microflows, decision tables) logic but does not yet offer a fully integrated GenAI-assisted logic composer or built-in process-mining/RPA capabilities. This means customers need to develop custom solutions or wait for future releases for those features. Additionally, although roadmap items include GenAI composition and logic agents, current multiagent orchestration and advanced intelligent logic optimization remain in development, which could leave gaps for organizations seeking out-of-the-box AI-driven workflow automation.

Microsoft

Microsoft is a Leader in this Magic Quadrant. Its LCAP offering is a combination of Microsoft Power Apps, Power Automate, Power Pages, Copilot Studio (additional licensing needed) and Dataverse under the Power Platform product suite. It is only available as a vendor-managed cloud service (PaaS).

Microsoft's operations are globally distributed, serving a broad customer base across industries and organization sizes. Power Apps is available via Microsoft-managed cloud with

Government Community Cloud (GCC), GCC High and sovereign cloud options. Recent investments focus on Copilot Studio, prompt-grounding architecture and secure orchestration of large language model (LLM) responses. It has also invested in Copilot Studio extensibility for enterprise data integration that preserves privacy.

Strengths

- **Overall viability:** Microsoft's strong financial position and commitment to Power Platform investment make it a highly stable choice for enterprise low-code adoption. Buyers benefit from tight integration across Microsoft 365, Azure and Dynamics 365 ecosystems.
- **Geographic strategy:** With data centers in virtually every global region and support for local regulatory requirements, Microsoft delivers sturdy hosting flexibility. Government, regulated and global customers can confidently meet their compliance standards.
- **Customer experience:** Microsoft's vast community, documentation and training resources support self-service and professional adoption. Customers benefit from consistent product evolution and a roadmap that integrates AI and data into citizen development.

Cautions

- **Vertical/industry strategy:** Microsoft provides general-purpose tools and templates but lacks deep out-of-the-box vertical solutions tailored to specific industries. This may require customers in regulated or niche industries to seek custom development or partner solutions.
- **Marketing execution:** Despite platform maturity, Microsoft's low-code messaging can be overshadowed by broader Microsoft 365, Dynamics 365 or Azure cloud-native development narratives, reducing clarity for buyers evaluating Power Apps against LCAP-first providers.
- **Operations:** Some enterprise customers report operational challenges managing the environments, data policies and licensing at scale with additional overhead in large and complex deployments. Also, clients with diverse technology portfolios report that tight integration with Dataverse and Azure is too restrictive for their target architecture.

Oracle

Oracle is a Challenger in this Magic Quadrant. Its LCAP offering is Oracle APEX, embedded in Oracle Database and Oracle Cloud Infrastructure, supporting declarative development, RESTful services and tight database integration.

Oracle's operations are geographically diversified, with enterprise clients in financial services, government, manufacturing and healthcare. APEX is available as an Oracle-managed PaaS environment and as a free service provided with Oracle Database, supporting all of the Oracle Database deployment options, including client self-managed and hybrid cloud. Recent updates include expanded generative AI support via OCI GenAI, improved availability and enhanced integration with external data sources.

Strengths

- **Overall viability:** Oracle's substantial and stable financial position, along with continued investment in OCI and APEX, ensures long-term platform support. Customers benefit from enterprise-grade reliability and global scale backed by Oracle's infrastructure footprint.
- **Sales execution/pricing:** Oracle APEX is available at no additional cost within Oracle Database and Autonomous Database environments. It is also available with usage-based pricing and no app limits as an Oracle APEX Service managed by Oracle on its OCI. This pricing model offers TCO advantages, especially for organizations already invested in Oracle's technology stack.
- **Customer experience:** Customers report positive support, mature documentation and proactive assistance for complex deployments. Enhanced integration options provide flexibility for connecting to diverse data sources.

Cautions

- **Vertical/industry strategy:** Oracle lacks deep prebuilt vertical solutions within APEX. Customers in regulated or specialized industries may need to custom-develop domain-specific capabilities, use domain-specific Oracle Applications or depend on third-party integrations.
- **Marketing execution:** APEX remains undermarketed compared to other Oracle offerings and competitors in the LCAP space. This limits platform visibility among buyers not already embedded in the Oracle ecosystem.

- **Marketing strategy:** Oracle's APEX messaging does not clearly distinguish its value proposition beyond existing Oracle customers. For net-new prospects unfamiliar with Oracle tooling, competitive differentiation is not easily articulated.

OutSystems

OutSystems is a Leader in this Magic Quadrant. Its LCAP offering is the OutSystems Developer Cloud (ODC), which includes ODC Studio, platform services, integrated continuous integration/continuous delivery (CI/CD) and built-in observability.

OutSystems operates globally, with a strong customer base in large enterprises across financial services, healthcare, logistics and telecom. ODC supports secure cloud-native deployments in OutSystems-managed, public cloud (Amazon Web Services [AWS]/Azure) and self-managed environments. Recent investments include a high-availability architecture, improved identity services and a Neural Autonomic Transport System (NATS)-based event bus for event-driven and distributed applications.

Strengths

- **Overall viability:** OutSystems continues to demonstrate strong financial backing and strategic investment in platform modernization. This offers long-term confidence for buyers requiring high-scale, enterprise-grade support.
- **Offering (product) strategy:** OutSystems has a well-articulated vision that aligns with the future of enterprise application development, including distributed architectures, multiexperience and agentic AI. Continued platform enhancements in cloud-native runtime, advanced observability and security help maintain differentiation.
- **Geographic strategy:** With substantial investment in international expansion, OutSystems maintains strong regional support across EMEA, North America and Asia/Pacific (APAC). Customers benefit from localized go-to-market coverage and multilingual capabilities.

Cautions

- **Vertical/industry strategy:** Although OutSystems supports industry-specific use cases via partners, it lacks a strong portfolio of out-of-the-box vertical solutions. Buyers in regulated or niche sectors may require custom accelerators to meet business needs.
- **Marketing execution:** Despite platform maturity, OutSystems' messaging does not always clearly communicate its differentiated value in complex enterprise settings. This reduces

visibility among net-new prospects seeking high-complexity app support.

- **Operations:** Customers report variability in support experiences depending on geography and partner involvement. Some large deployments require additional OutSystems engineering assistance beyond standard support tiers.

Pegasystems

Pegasystems is a Visionary in this Magic Quadrant. Its LCAP, Pega Infinity, supports SaaS CRM apps (e.g., customer service, engagement and sales automation) and can run as vendor-managed PaaS or on customer infrastructure. Its client base consists mostly of large enterprises in North America and EMEA in banking, insurance, government and telecom. Pegasystems is advancing GenAI for legacy modernization, offering chat-based developer tools and GenAI Blueprint to generate app components like UIs, data models, process flows and test data.

Strengths

- **Product:** Pegasystems has strong capabilities across the software development life cycle to support building and managing complex enterprise applications. The addition of Pegasystems Blueprint is accelerating the design and development of applications by leveraging GenAI to use requirement documents, process flows and images to generate application components.
- **Geographic strategy:** Pegasystems is a global vendor with direct presence through its offices across all major regions in the world. Additionally, with strong partnerships with large system integrators such as Cognizant, Accenture, Capgemini and others, it provides strong credentials to support enterprise clients across the globe.
- **Market understanding:** Pegasystems showcases its understanding of the evolving low-code market by making product investments in GenAI to support legacy modernization, building and managing agents, and enhancing governance within the platform to manage the application and AI sprawl within enterprises.

Cautions

- **Sales execution:** Pegasystems' revenue growth rate for its LCAP product in 2024 continued to be modest compared to Leaders in this Magic Quadrant. Gartner customers report concerns around high total cost of ownership and high degree of vendor lock-in while making their decision around Pegasystems.

- **Marketing execution:** Market awareness of Pegasystems as a low-code application development platform continues to be limited when compared with Leaders in this market. Its focus on content marketing, events and partner marketing has not yielded positive results to change its perception from an automation-focused vendor to a general-purpose low-code vendor.
- **Market responsiveness:** Though Pegasystems has constantly added new capabilities to its platform, changes in its overall go-to-market strategy have not yet yielded results sufficient to reverse the consistently slow growth rates of its LCAP product over the past three years.

Retool

Retool is a Niche Player in this Magic Quadrant. Its LCAP, the Retool platform, targets internal app development with visual tools, JavaScript extensibility, reusable components and native DB/API integration. Retool primarily serves North America, catering to tech startups and enterprise teams in finance, logistics and consumer goods. It has enhanced AI-assisted app generation, expanded enterprise data support and added deployment/access controls for regulated environments. Retool is available as a cloud service, self-hosted or in private clouds.

Strengths

- **Customer experience:** Retool receives positive customer feedback for its simplicity, rapid development cycle and developer-centric onboarding. Teams with JavaScript skills can achieve high velocity and ownership without extensive ramp-up.
- **Innovation:** Retool has continued to differentiate through consistent delivery of developer-optimized enhancements, including programmable workflows, Retool AI assistant and support for embedded applications. This focus aligns well with modern internal tool delivery models.
- **Geographic strategy:** Although primarily U.S.-centric, Retool has expanded its global hosting options and improved support for VPC and self-managed deployments. This gives enterprises operating in regulated or sensitive environments additional deployment flexibility.

Cautions

- **Business model:** Retool's published list pricing for Team and Business tiers is not optimized for large Enterprise rollouts, where user counts can be unpredictable. Therefore, customers with large and unknown end-user profiles may experience cost visibility challenges and should negotiate custom agreements.
- **Vertical/industry strategy:** Retool lacks industry-specific templates or regulatory accelerators. Clients in verticals such as healthcare or government may need to invest more effort in compliance mapping and process standardization.
- **Marketing strategy:** Retool's brand recognition remains lower than the vendor average. Business stakeholders evaluating enterprise low-code platforms may potentially overlook Retool due to its limited presence in mainstream analyst events and industry media.

Salesforce

Salesforce is a Leader in this Magic Quadrant. Its Salesforce Platform includes embedded and agentic AI (Einstein and Agentforce), low-code builders, workflow tools, Data Cloud and integrations with Slack, Tableau and MuleSoft. It runs on Hyperforce, ensuring global compliance, scalability and availability. Salesforce has a global footprint and serves large enterprises in finance, retail, government and healthcare. Recent enhancements include Agentforce for AI orchestration and enablement of agentic AI, Prompt Builder, LLM Gateway and improved metadata-driven development.

Strengths

- **Overall viability:** Salesforce's broad product portfolio, recurring revenue base and sustained investment in AI and data services ensure strong platform durability. Its cohesive ecosystem enables customers to adopt AI, automation and analytics without third-party dependencies.
- **Geographic strategy:** Salesforce's global presence with robust local hosting and multilingual support enables compliance and localization for enterprise customers to meet compliance, latency and localization needs efficiently.
- **Customer experience:** Salesforce customers benefit from comprehensive learning resources, community forums and embedded product support with integrations that enhance developer productivity and collaboration.

Cautions

- **Marketing execution:** Salesforce's broad messaging strategy dilutes clarity around the low-code platform's stand-alone capabilities, causing confusion for buyers evaluating pure-play LCAP solutions.
- **Vertical/industry strategy:** Although Salesforce provides strong CRM-based industry solutions at the time of collecting data for this analysis, Salesforce's low-code platform lacked generally available purpose-built vertical components outside of customer experience and engagement domains. This may require clients to use solutions from Salesforce Industry Clouds combined with Salesforce LCAP features or create a custom implementation for non-CRM use cases.
- **Operations:** Platform complexity and dependencies between ecosystem products, for example MuleSoft or Tableau, can pose integration challenges. This may require customers to have deep expertise or find SI partners to fully operationalize advanced use cases.

SAP

SAP is a Visionary in this Magic Quadrant. Its LCAP offering is SAP Build, a unified low-code platform encompassing tools for app development, workflow automation, digital workspaces and AI agents. SAP Build supports cloud-native and hybrid deployments and is fully integrated with both SAP and non-SAP systems.

SAP operates globally, with a customer base in large enterprises across industries such as manufacturing, retail, public sector and healthcare. SAP prioritizes SAP Build to include embedded AI assistant capabilities, proprietary generative AI models and prebuilt content, which spans over 500 finance, human capital management (HCM) and supply chain use cases.

Strengths

- **Overall viability:** SAP's established enterprise presence and stable financials reinforce the long-term development of SAP Build with integration across SAP's product suite.
- **Geographic strategy:** SAP's strong local market presence across all global regions, supported by an extensive partner network, allows enterprise customers to execute projects with localized language support, compliance and services.
- **Customer experience:** Enterprises benefit from SAP's mature support infrastructure, including dedicated account teams, robust training and integrations with core business

systems.

Cautions

- **Business model:** SAP Build's branding and messaging remain undervalued outside its application customer base, limiting visibility among new prospects.
- **Vertical/industry strategy:** SAP Build vertical accelerators are available for SAP applications only. Industry requirements not addressed by SAP industry solutions require custom development.
- **Operations:** Customer feedback indicates variability in implementation quality and partner consistency across regions, with project success often dependent on experienced SAP consulting or SI partners.

ServiceNow

ServiceNow is a Leader in this Magic Quadrant. Its LCAP offering is App Engine. App Engine can be deployed as a SaaS solution on the ServiceNow AI Platform. It is available in ServiceNow-managed cloud instances across multiple global regions with options for dedicated and high-availability configurations.

ServiceNow's operations are geographically diversified with clients of all sizes across all sectors. In November 2024, ServiceNow launched the GenAI-native ServiceNow Studio, and in March 2025, it introduced Now Assist for App Engine, enabling embedded AI agents and 24 GenAI skills for app creation.

Strengths

- **Customer experience:** ServiceNow's extensive partner network provides customers with broad regional implementation expertise and support. Its large developer community and comprehensive training programs help teams build skills and deploy solutions more effectively. High adoption rates, with ServiceNow claiming most customers create custom applications within their first year, indicate the platform engages users and balances performance insights with privacy controls.
- **Operations:** ServiceNow consolidates performance metrics, security logs (via security information and event management [SIEM] integration) and usage analytics into a unified dashboard. This reduces the time and effort teams spend switching between separate tools and enables faster identification of bottlenecks or security issues.

- **Platform governance:** ServiceNow's governance framework includes clearly defined roles that enforce security, privacy and ethical standards while tracking AI agent performance. The platform is backed by ServiceNow University's structured learning paths and certifications (e.g., certified system administrator [CSA] and certified application developer [CAD]) which provide consistent onboarding and compliance training for developers.

Cautions

- **Offering (product) strategy:** ServiceNow's push to embed GenAI introduces features like Doc Intelligence and Agent2Agent that are still evolving. This will require customers to invest extra time validating stability and fit for their use cases. Additionally, leveraging Integration Hub for comprehensive data and process integration requires a Workflow Data Fabric license, which can increase the overall cost of the solution.
- **Sales execution/pricing:** ServiceNow's licensing structure involves multiple module tiers and add-ons which make it difficult for customers to forecast total costs and compare packages. Additionally, its consumption-based billing model may lead to unpredictable expenses and limited flexibility in contract negotiations, potentially straining budgets as usage scales.
- **Marketing execution:** ServiceNow's App Engine is still widely perceived as being IT-focused despite its continued expansion into broader enterprise workflows. This perception may limit its appeal and visibility among non-IT buyers such as marketing or operations teams, especially compared to platforms that lead with a more business-user-centric value proposition.

Zoho

Zoho is a Challenger in this Magic Quadrant. Its LCAP, Zoho Creator, enables end-to-end app development and deployment. Clients who need advanced control can also leverage optional tools like Zoho QEngine, Sprints and Cliq for testing, planning, integration and DevOps. It supports deployment on Zoho Cloud, any other vendor-managed cloud service or on customer infrastructure. Zoho serves mostly small to midsize enterprises in North America, EMEA and APAC across manufacturing, tech, professional services and education. Recent updates include AI-assisted development and support for customer-managed encryption keys for app data security.

Strengths

- **Overall viability:** With over 20,000 paying customers using the Zoho Creator platform, prospective customers are assured that Zoho Creator continues to be a strategic component of Zoho's product portfolio.
- **Geographic strategy:** Zoho continues to have a strong commercial and customer presence globally across the major regions. Though dominated by small partners, Zoho has a robust partner network of 850+ partners across the globe.
- **Sales execution/pricing:** Zoho Creator offers multiple pricing models tailored to the adoption needs of different enterprises. Zoho also promotes transparency by publishing price information on its site.

Cautions

- **Product:** Zoho Creator lacks the advanced capabilities needed by software engineering teams. Agile planning, automated testing, custom setup for CI/CD pipelines and application monitoring are either absent or provided through other solutions in the Zoho ecosystem at an additional cost.
- **Business model:** Large enterprises remain a small segment of Zoho's customer base despite its enterprise features. Success with large enterprises requires further changes in Zoho's business model, product strategy and approach to developing its partnership network.
- **Innovation:** Zoho lacks innovative capabilities when compared with leaders in this market. However, the platform's recent additions, such as improving its breadth of UI components, creating custom APIs and developing a natural language-based UI, may help Zoho catch up with the industry.

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

No vendors were added to this Magic Quadrant.

Dropped

Newgen was not included because of the requirement that the LCAP software product must be publicly available, including technical documentation, self-service tooling for development and operations (SDKs), developer community, public pricing and trial licensing models.

Inclusion and Exclusion Criteria

To qualify for inclusion, providers need to:

- Demonstrate a **go-to-market strategy and software product offering** for its low-code application platform for cross-industry or general-purpose application development:
 - The LCAP must not be used only or mainly for building specific vertical/industry applications and it must not be a product bundled within some other solution or platform.
 - The LCAP software product must be publicly available, including technical documentation, self-service tooling for development and operations, developer community, public pricing and trial licensing models (usage limitations, freemium, etc.)
 - Support the development and deployment of applications in a distributed environment across org structures of IT and business departments.
- The LCAP must provide **low-code capabilities** (minimize or eliminate the need for coding and code maintenance tasks) to:
 - Develop, version, test, deploy, execute, administer, monitor and manage the applications and their relevant artifacts.
 - Provide features to design a data schema and implement application logic.
 - Support composition of internal and external data sources, including internal database and extendable connectors to external databases, APIs and event channels.

- Create rich application user interfaces for web and mobile channels.
- Support change management over multiple environments (development, test, staging, production).
- Maintain a catalog (a marketplace) for sharing components, modules, connectors and templates within the client's organization or across different clients.
- The LCAP must be enterprise-grade by providing:
 - High availability and disaster recovery
 - Secure access to applications
 - Technical support to customers
 - Third-party application access to application logic and/or data via APIs and/or event topics

In addition to the above market and technical criteria, each participating vendor must meet the following business criteria:

- **Size:** The vendor must, by 31 March 2025, fulfill one of the following size requirement combinations:
 - LCAP license and/or subscription revenue of at least \$60 million for LCAP over the previous year and at least 100 paying enterprise customer organizations (of at least 1,000 employees) for its LCAP offering, excluding other related product offerings.
 - LCAP license and/or subscription revenue of at least \$25 million for LCAP over the previous year and at least 5,000 paying enterprise customer organizations for its LCAP offering, excluding other related product offerings.
 - LCAP developer community of more than 100,000 developers using the LCAP across all customers.
- **International presence:** The vendor must have direct customers (i.e., not through resellers) within three or more of the following geographies:
 - North America
 - Europe

- South America
- Middle East and Africa
- China
- Japan/Asia/Pacific

Vendor ranks among the Top 13 for the Customer Interest Indicator (CII) as defined by Gartner. CII was calculated using a weighted mix of internal and external inputs that reflect Gartner client interest, vendor customer engagement and vendor customer sentiment from March 2024 to March 2025.

Evaluation Criteria

Ability to Execute

Gartner’s weightings for Ability to Execute emphasize product and sales execution/pricing criteria.

Ability to Execute Evaluation Criteria

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

<i>Evaluation Criteria</i>	<i>Weighting</i>
Operations	Low

Source: Gartner (July 2025)

Completeness of Vision

Gartner’s weightings for Completeness of Vision emphasize market understanding, offering/product strategy and innovation criteria.

Completeness of Vision Evaluation Criteria

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

Source: Gartner (July 2025)

Quadrant Descriptions

Leaders

Enterprise LCAP Leaders demonstrate both strong execution (particularly in terms of business performance) and a strong vision (in terms of product and go-to-market strategies). These vendors stand out in a highly competitive global market and serve a wide range of organizations and application use cases with their robust LCAP offerings.

Challengers

Enterprise LCAP Challengers demonstrate strength in execution but lack the vision of Leaders (especially in offering and go-to-market strategies for broader use cases and markets). Such vendors have shown strong execution in their respective focus areas and are expanding their customer base. However, they have not demonstrated the market understanding and vision required to expand their offerings beyond their core customers to serve different types of buyers and needs.

Visionaries

Enterprise LCAP Visionaries demonstrate a good strategic vision and a strong understanding of the needs of the enterprise LCAP market. However, these vendors have not yet demonstrated a strong track record of executing their strategies and may fall behind competitors in the execution of their strategy or product capabilities.

Niche Players

Enterprise LCAP Niche Players are vendors that focus on a specific market area or have a regional geographic footprint. While they have not demonstrated the strongest Completeness of Vision or Ability to Execute relative to other evaluated vendors, qualifying for this Magic Quadrant is an accomplishment (as hundreds of different vendors market their products as LCAPs). Niche Players in the LCAP market may also be high performers in adjacent technology markets and in some cases can be the most suitable option for specific application use cases.

Context

Enterprise Low-Code Application Platforms (LCAP) Market

This market continues to evolve rapidly, reflecting the growing demands of enterprises to deliver complex, scalable and mission-critical software solutions faster and more efficiently. Gartner experts observe a notable shift in how LCAPs are being positioned and adopted — no longer just as tools for lightweight workflows or departmental apps but also as core platforms for professional software engineering teams.

Strategic Expansion Into Enterprise-Grade Engineering Use Cases

All participating vendors and many of those who didn't pass the inclusion criteria demonstrate how their platforms are now being used for enterprise-class applications that require robust architecture, high availability, sophisticated data integration and regulatory compliance. Platforms such as those from Appian, Microsoft, Oracle, Salesforce and ServiceNow are increasingly adopted for business-critical workloads across industries, including finance, healthcare, logistics and government.

This evolution underscores the role of LCAPs as engineering accelerators, enabling professional development teams to focus on business logic and innovation rather than management of code assets and overcoming infrastructure challenges. Several vendors demonstrated a rise in use cases, such as internet-facing applications, API ecosystems and modular enterprise systems, with integration and composability emerging as key differentiators.

AI-Augmented Development Workflows

A unifying trend across participating vendors is the integration of AI-assisted development into the core platform experience. Generative AI is now being used to streamline activities such as model-driven development, test generation, documentation and security guardrails.

Rather than targeting nontechnical users, these capabilities are being tuned to enhance developer productivity and enforce architectural standards. AI is increasingly embedded as a co-developer, supporting experienced teams working on high-impact digital initiatives.

Platform Maturity and Differentiation in a Competitive Market

As client expectations evolve, vendors are responding with strategic roadmap investments aimed at platform unification, developer toolchain integration and verticalized solutions. Vendors like Retool and Mendix emphasize enhancements in DevOps alignment, extensibility frameworks and open standards support to better serve professional engineering audiences.

Vendors are also increasing attention on runtime scalability, observability and deployment flexibility — key requirements for engineering teams building multiregion, multitenant systems. These shifts reflect a broader trend of LCAPs transitioning from peripheral tools to enterprise-grade platforms that complement or replace traditional development environments.

Market Overview

The Enterprise Low-Code Application Platform (LCAP) market is continuing its shift from a peripheral, departmental automation enabler to a central component of enterprise application delivery.

Overall, the LCAP market demonstrates resilience and strategic value as vendors increasingly tie platform selection to broader digital transformation and AI-readiness agendas across global enterprises.

Despite earlier associations with citizen development, the market is now firmly oriented toward serving the needs of professional developers working in fusion teams or software engineering units. Vendors gaining momentum in enterprise evaluations are those that successfully bridge ease of use with advanced controls and customizability while supporting advanced integration, observability and security requirements.

Generative AI has emerged as the most prominent market catalyst, triggering widespread investment across platforms to embed AI into core developer experience and support Agentic AI as a new way of implementing business capabilities. Vendors are not only integrating AI to accelerate application design and testing but are also using it to enable continuous optimization post-deployment.

The growing emphasis on building agentic applications reflects the need for solutions that can evolve with usage patterns and integrate seamlessly with enterprise data ecosystems, demanding strong alignment with AI ModelOps and data fabric capabilities.

⊕ Evaluation Criteria Definitions

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