Vendor Landscape: A Fork In The Road For Low-Code Development Platforms

New Choice: Low-Code For AD&D Versus Low-Code For Business Developers

by John R. Rymer
July 31, 2017

Why Read This Report

With the pressure on application development and delivery (AD&D) pros for new software to support digital transformation and coders in short supply, low-code development platforms have become a hot commodity. Yet this market's many vendors and its rapid evolution make product choices challenging and strategy creation even harder. Read this research for a map of the vendor landscape to chart your firm's low-code journey.

This report updates and revises "Vendor Landscape: The Fractured, Fertile Terrain Of Low-Code Application Platforms"

Key Takeaways

Low-Code Platforms Spreading Fast
Customer interest in low-code development platforms runs high, reflected in high double-digit growth for the leading vendors as well as many smaller providers. We estimate aggregate 2017 revenues of $3.8 billion. The recent entrance of Microsoft and Oracle into the market helps legitimize the category.

Market Segmentation Reshuffles
Two new segments have emerged, superseding our early functional categorization. Low-code platforms for AD&D target pro development groups with rich tooling and promises of high scale. Low-code platforms for business developers target nontraditional developers with simple tooling and more modest scale.

Key Challenge: Deliver AI Innovations
The low-code vendors targeting enterprise AD&D established their positions based on strength in development of web applications. As customers rely on low-code for more use cases, these vendors must add new technologies to their platforms, with machine learning, bots, and streaming data at the top of the priority list.

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with Christopher Mines, Jeffrey S. Hammond, Rob Koplowitz, Allison Vizgaitis, and Andrew Reese

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The Low-Code Platforms Is Market Growing Fast And Branching Out

Client interest in low-code development platforms is rising — a logical response to the extreme pressure for new, modern software to win, serve, and retain customers. How do low-code platforms help AD&D pros create better software more quickly? Declarative development and incremental application development allow developers to build major types of business applications faster and more accurately than traditional coding and enterprise licensing models.

Low-code development platforms are:

> *Products and/or cloud services for application development that employ visual, declarative techniques instead of programming and are available to customers at low or no cost in money and training time to begin, with costs rising in proportion of the business value of the platforms.*[1] *(We use the term low-code because many — sometimes most — enterprise applications require some coding to complete.)*

Many vendors employ declarative development approaches, and so the low-cost/pay-as-you-grow business model often distinguishes vendors of low-code platforms.

Four Central Characteristics Of The Low-Code Platforms Market

High customer interest in low-code development platforms has yielded a dynamic market landscape characterized by:

› **Rising revenues, high growth rates, and broadening enterprise acceptance.** The leading vendors of low-code development platforms report annual growth rates in excess of 50%, albeit from sub-$500 million revenue bases (with one exception). Revenue for the vendors we track reached an estimated $2.6 billion in 2016, supporting a 46% jump in the overall category to an estimated $3.8 billion in 2017 (see Figure 1).[2]

This growth is fueled by large enterprises' rising appreciation of low-code platforms as tools for complex problems such as running nationwide product recalls, engaging with retail customers to create customized clothing, and administering insurance lines. Typically, these and other low-code applications integrate with back-office systems but don't replace them. However, one vendor — Thinkwise — offers a low-code platform specifically for building custom enterprise resource planning (ERP) applications.

› **A diverse, and still-evolving, collection of vendors.** The market for low-code platforms is maturing, but still fragmented. Forrester tracks 67 distinct vendors; dozens of others exist but are either too small or too regionalized to warrant coverage. Forrester estimates that most low-code vendors have annual revenues of less than $100 million, meaning that even well-recognized, fast-growing vendors such as Mendix and OutSystems are still small in the context of the overall market for enterprise software, which is upward of $500 billion annually (see Figure 2).

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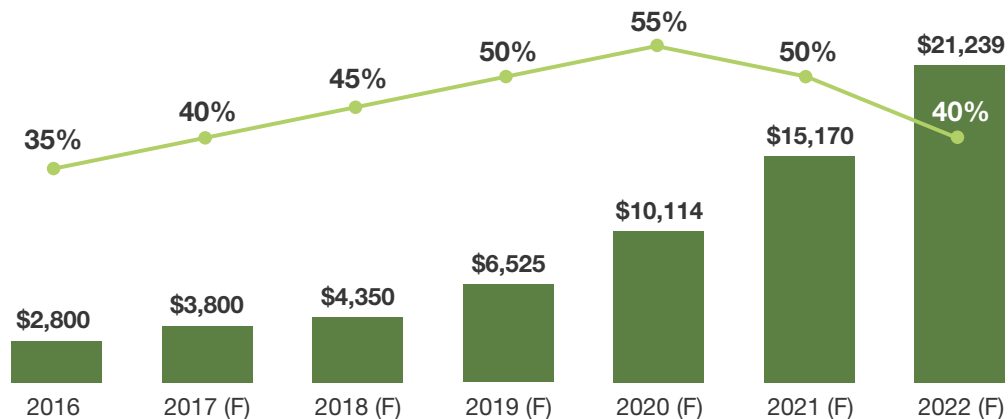New Choice: Low-Code For AD&D Versus Low-Code For Business Developers

New vendors arise regularly, often by targeting narrow use cases to establish themselves. Slingr enables quick creation of apps using front ends such as Slack and Salesforce as a back end. Skuid wins with consumer-grade user experience for Salesforce-based apps, but it can tackle many more use cases. Pulpstream started with mobile apps for field operations and is now expanding into general business apps. TIBCO Software's Simplr and FlowForma's BPM both seek to empower business experts to create workflow applications.

› **Established enterprise vendors making their low-code bets.** Alone among $1 billion-plus enterprise vendors, only Salesforce embraced low-code platforms (with Force.com) prior to 2017. But this year, Dell, Microsoft, and Oracle have each added low-code platforms to their portfolios.[3] By yearend, we predict that IBM and SAP will have joined the platforms market, as well. These developments from the biggest vendors help legitimize the category for enterprise customers — even if their products fall short of the low-code market leaders. When Oracle's executives tout low-code as a primary benefit of the Oracle Cloud, its customers take notice.[4]

› **Customers making a cloud connection; see low-code as a PaaS option.** Public cloud applications and platforms are the cornerstones of most enterprises' digital transformation strategies. Most of the vendors now offer AD&D pros low-cost, self-service, platform-as-a-service (PaaS) options. Low-code platforms are entering into AD&D considerations of public cloud applications and platforms, opening new avenues for growth.

FIGURE 1 Low-Code Development Platforms Market Growing Fast

Projected low-code development platform market growth

Year-over-year growth rate

(F) = Forrester forecast
Note: The figure for 2016 is estimated.
Source: Forrester estimates, vendor reporting

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FIGURE 2 Low-Code Vendors We Track: Diverse Group Accounting For Most Revenues

Estimated 2016 revenue*	Vendors	Category totals*
More than $200	FileMaker, Magic Software, Salesforce	$1,275
$100-$200	Appian	$135
$50-$100	Bizagi, IMIMobile, K2, Kintone, Mendix, Nintex, OutSystems, Quick Base, ServiceNow, Zoho	$810
$25-$50	MicroPACT, PNMSoft, Ultimus, Zudy	$120
$10-$25	AgilePoint, AuraPortal, BP Logix, Caspio, Capriza, Kony, Microsoft, PMG, Progress Software, Servoy, Skuid, Software AG, Thinkwise, WaveMaker	$205
$2-$10	Alpha Software, Alphinat, Appery.io, BMC, ClaySys, Dell Boomi, FlowForma, i-exceed, Intellect, , Job Router, July Systems, KISSFlow, MatsSoft, Mercato Solutions, MIOsoft, MobileSmith, M-Power, Pneuron, PowWow Mobile, Pulpstream, Sapho, Slingr, Snappii, Tallyfy, TIBCO, Trackvia, ViziApps, Vizru, WhoGloo, Work-Relay	$135
Less than $2M	Rapid Information Systems, Simplicite, Torus Innovations	$5
	Grand total	**$2,685**

*In millions

As Functional Categories Collapse, Two New Segments Emerge

We initially divided the market for low-code development platforms market into five functional segments — low-code platforms for process apps, database apps, request-handling apps, mobile apps, and general-purpose platforms covering many use cases. For example, process-centric, low-code platforms brought process modeling and management to low-code development, while mobile-first platforms were best for building mobile apps.[5]

These five functional segments have blurred as vendors have invested to address the broadest possible range of use cases and app workloads. Most platforms are now, or soon will be, general-purpose low-code platforms, although mobile-first platforms remain a robust segment.[6]

New Segments Are Defined By Target Buyer And Vendor Ambition

Going forward, the low-code platforms market will coalesce into two new segments, defined by the target buyer as well as the vendor's ambition to influence who delivers applications and how they deliver them (see Figure 3):

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› **Low-code platforms for AD&D pros.** These platforms are designed to provide professional developers with a much more productive alternative to programming. Pro developers value control and process as well as productivity, so low-code platforms for AD&D pros provide multiple design surfaces, tools for configuration of the platform itself, UX controls, integration tools, and data management features. Many of these products also provide tools that allow business experts to contribute to AD&D projects.

These vendors seek to convince AD&D leadership to adopt their platforms as strategic alternatives to Java and/or .NET (typically), even if the sales process starts out by selling to an AD&D team embedded in a business unit. Focusing on AD&D pros as the customer requires these vendors to engineer for large-scale applications and support the widest possible range of use cases. Appian, Mendix, OutSystems, and Salesforce are well-known vendors in this segment.[7]

› **Low-code platforms for business developers.** These platforms are designed to empower line-of-business developers, business analysts, and other nontraditional developers.[8] These people value simple and direct tools that help them quickly define processes, forms, apps, and databases, as well as immediate deployment to test and refine their work. Thus, these platforms provide simplified developer experiences — a spreadsheet metaphor, a sequence of questions leading to an app definition, or an application framework — rather than several different design surfaces and tools.

Vendors of low-code platforms for business developers sell to business leaders, seeking to enlist the support of AD&D pros to create integration links, advise on security, and help with app scalability, platform updates, and similar issues. These platforms include tools to help AD&D pros play these supporting roles. Most — but not all — of these platforms are engineered for medium-scale applications and for a limited number of use cases. Caspio, Kintone, MatsSoft, and Nintex, among others, pioneered this segment.

FIGURE 3 Emerging Low-Code Segments Based On Target Customers

Low-code for AD&D pros	Low-code for business developers
• Goal: speed software delivery by making pro developers more productive.	• Goal: speed software delivery by letting business experts drive it.
• Target buyer: AD&D leaders.	• Target buyer: business leaders.
• Designed for developer control and flexibility.	• Designed for simplicity to empower nontraditional developers.
• Addresses many use cases.	• Addresses narrow range of use cases.
• Targets medium-sized to large apps.	• Targets medium-sized apps.
• Provides tools for business experts.	• Provides tools for AD&D and IT pro support.
• Prefers "low-code" message.	• Prefers "no code" message.

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Both Sets Of Vendors Seek Revolution — Through Different Means

The path to prosperity for both vendor segments leads to a strategic position within customer-obsessed AD&D strategies.[9] Both types of vendors promote the modern application delivery approaches essential to success with customers, but via different routes to market (see Figure 4):

› **Revolutionizing application delivery from within.** Vendors of low-code platforms for AD&D pursue modern, responsive application delivery by enabling a revolution within AD&D organizations. These vendors enable close collaboration between AD&D pros, business experts, and even end customers. Their path to success is to empower AD&D pros first, then enlist AD&D pros to support work by business developers with platform tooling, architectural and design guidance, and project governance. Ultimately, these vendors hope to add line-of-business (LOB) developers as active customers.

› **Revolutionizing application delivery from without.** Vendors of low-code platforms for business developers pursue modern, responsive app delivery by enabling a revolution outside of AD&D. These vendors empower typically underserved, aggressive LOB units, enabling them to gain substantial control over the application strategy and put it in the hands of business experts. They always enlist the support of AD&D for the work of nontraditional developers, but ultimately also seek to persuade AD&D pros to use their platforms as well.

FIGURE 4 Vendors Take Divergent Paths To Market, But Seek Broad Positions

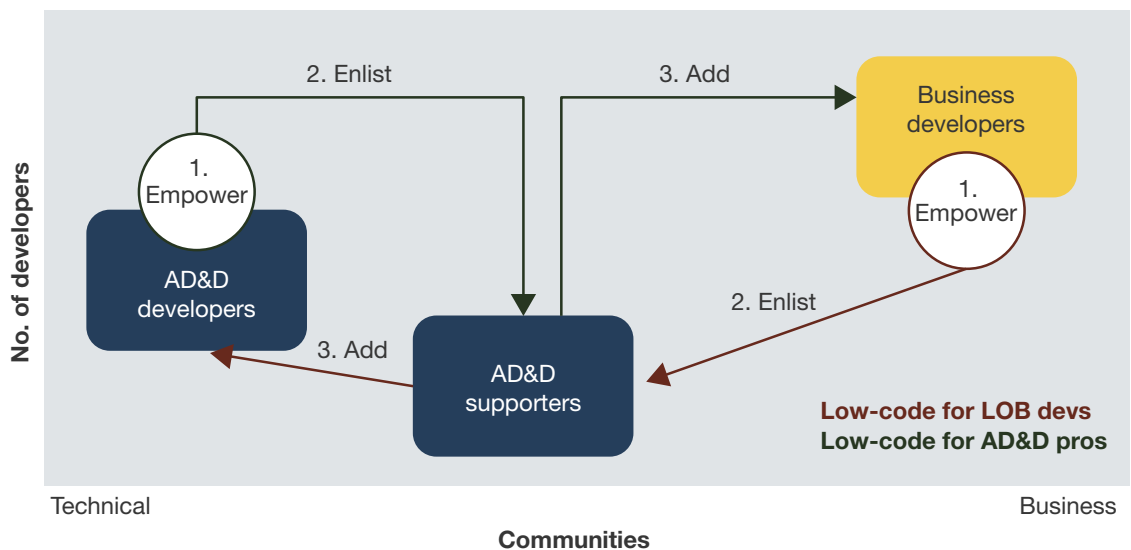FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

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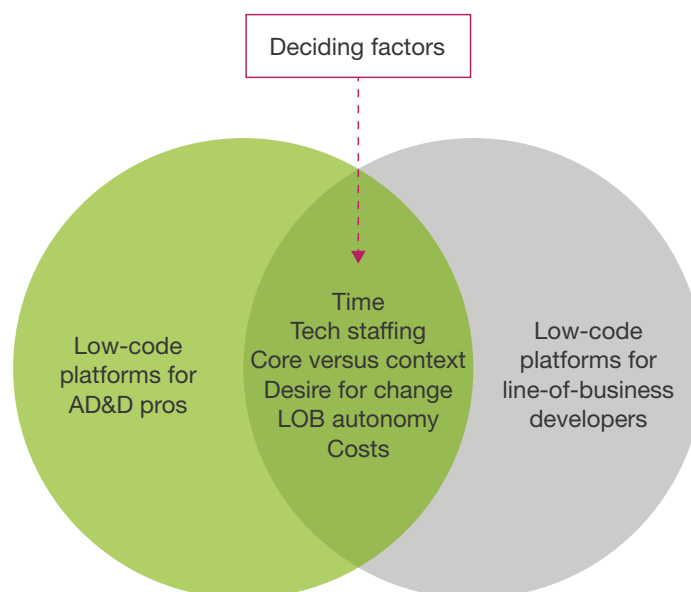New Choice: Low-Code For AD&D Versus Low-Code For Business Developers

Vendors In The Two Segments Overlap And Compete

Vendors in the two segments sometimes overlap in sales situations as AD&D and business leaders wrestle about how to improve responsiveness to customers. Overlap occurs when:

› **Vendors of AD&D platforms sell to business leaders that have developers.** Some vendors appeal to business leaders first and to developers who work for those leaders second. For example, Trackvia targets business leaders as sales targets, but it prioritizes business leaders who have AD&D resources at their disposal. The Trackvia Platform provides the rich controls developers want, but the vendor sells only indirectly to AD&D pros.

› **Vendors in each segment compete for the same customers.** Customers inspired by the potential of low-code platforms will consider products in both segments. In those situations, customers frame their choices using five factors (see Figure 5). Time-to-delivery can be the deciding factor, trumping deep functionality and application control features. Cost is a deciding factor when the customer wants to start small but a vendor imposes a high minimum deal size. If AD&D staff aren't available to work on the platform, the customer's choice will be biased toward platforms for business developers.

An intangible is the customer's desire for deep AD&D changes. A senior executive at a media company, for example, vetoed his central AD&D group's platform choice because it didn't promote radical improvement in delivery speed. The executive forced a trial of a different platform that eventually won adoption.

FIGURE 5 When Vendors From The Low-Code Platform Segments Compete

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AD&D Gaps And Shortfalls Make Pro Services Crucial

The low-code platform market challenges the truism that the best software vendors rely on product revenues, not services revenues. A software vendor overly dependent on professional services gets distracted by low-margin activities and often offers a product that's too difficult for customers to adopt on their own. Low-code platforms are so easy to use that requirements for pro services should be minimal, but that may not be the case. Why?

› **The customer may have a high need for software, but lack the AD&D pros to deliver.** Among the groups in the typical enterprise most underserved by central AD&D are those running operations — sales, marketing, field, logistics, facilities, and the like. These groups can't get the software they need for responsiveness and efficiency, and they don't have AD&D pros to help them either. Low-code vendors often fill this gap with their professional services teams, delivering many projects over the course of years.

› **The customer may have AD&D talent, but lack experience for long-term success.** Low-code platforms reduce the specialized expertise needed to deliver apps, but customers often rely on platform vendors for consulting on how to scale, configure, and secure their installation (or subscription) and on how to architect to create dozens or hundreds of sustainable applications. Even experienced AD&D teams can benefit from this consulting, often on a sustained basis.

› **The vendor may lack implementation partners and want to ensure customer success.** The largest low-code platform vendors — Appian, Salesforce, Mendix, OutSystems — have implementation partners, including large systems integrators. Many of the other vendors do not, usually because they are either too small or too young. As these vendors grow, more pro services work will presumably transition to implementation partners.

Or perhaps not. The number of customers we've encountered without any AD&D pros is striking, and it seems unlikely this will change quickly. The low-code vendors that fill the gap with pro services do so with relatively short-term engagements — one or two people for days or weeks. The efficiency of these pro services reflects the high productivity of the platform. The situation bears watching: Customer gaps may require low-code platform vendors to maintain pro-services groups for many years, and the revenue from them may carry higher margins than traditional systems integration services.

AI Features Are The Next Frontier For Low-Code Platforms

The best of the low-code platform vendors keep pace with new technologies and use cases, expanding into mobile apps and social collaboration during the late 2000s. The next big technologies for low-code vendors to incorporate center on artificial intelligence (AI) and internet of things (IoT) sensor data. Of the two, AI has the deepest potential value to customers, but it is also most difficult to understand. To retain relevance, low-code platform vendors will apply AI to their products in three ways:

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> **Empowering developers to use natural-language processing within applications.** A primary use case for AI is to make user interfaces and interactions smarter. For example, an application interprets the language a customer uses to make a request, and based on the semantics, context, and intent of the request, it responds either by making a recommendation or taking an action.[10] Low-code platforms must make such interactions straightforward to create, just as they today simplify creation of GUIs and mobile apps.

> **Integrate with machine learning (ML) services to expand automation.** ML services make predictions, find patterns, and make decisions by analyzing large pools of data, and they evolve their analysis models in response to new and changed data. At this early stage of ML's commercialization, AD&D pros use specialized predictive analytics solutions, some of which are available as public cloud services.[11] Developers using low-code platforms will look to their providers for ML features to automate tasks such as customer segmentation, fraud detection, sales decision making. A looming question for the vendors: Implement ML services as platform features or provide access to third-party services from Amazon, Google, IBM, and other vendors?

> **Supercharge platform automation and insights with internal ML.** Low-code platforms today employ data arising from customer development activities to promote quality, automate creation of forms and other assets, and suggest development actions. Applying ML to the internal operations of low-code platforms is the next step, and it holds the potential to raise productivity, improve application outcomes, and optimize operations. Applied to understanding developer intent, ML can spur more automated actions, saving time. Turn ML algorithms loose on applications to flag performance-sapping or insecure designs.

Recommendations

Decide On Your Firm's Low-Code Play — And Drive It

Low-code platforms are proving to be an important tool for AD&D to raise their enterprises' capacity to deliver applications to win, serve, and retain customers. Low-code platforms can help every enterprise advance its application delivery. However, it's becoming clear that low-code platforms are not of value strictly to AD&D professionals. The rise of effective platforms for business developers gives AD&D the option of sponsoring and supporting managed application development by and for business. In formulating your approach:

> **Drive the process.** Low-code is coming to your organization — or is already in place. Don't sit on the sidelines, but rather lend your teams' expertise in application design, architecture, and process to a productive adoption strategy. Help your business colleagues imagine powerful ways to use technology to advance customer success.

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› **Guide platform selection by who does the work.** Mind the divide between low-code platforms for AD&D pros and platforms for business developers. The wrong choice will be disastrous. For example, a North American financial services firm seeking to automate its many manual administrative processes was almost forced to favor low-code platforms for business developers. Why? All the firm's AD&D pros are occupied keeping the back-office applications running. Thus, business developers must deliver the new administrative applications.

› **Create a matching adoption plan and governance policy.** Assume you'll need both an adoption plan and a governance strategy for your enterprise's low-code platform(s). Adoption plans are the difference between a product used for one or two applications and a platform supporting an application portfolio numbering in the hundreds. Training is crucial, but so is support from AD&D on design, architecture, and process, as well as operational support for the platform.

A governance policy for low-code platforms balances the creativity of developers (professional and nontraditional) with application sustainability. The approach must be dynamic, addressing who builds the apps, how the apps are built, which apps are built, where the apps are built, and when the apps are built.[12]

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Supplemental Material

Listing Of Low-Code Platform Vendors By Segment

Following is a list of vendors competing in the low-code development platforms market, classified into four segments (see Figure 6).

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FIGURE 6 Vendor Breakdown Within Low-Code App Segments

Vendor	Mobile-first	AD&D pro	Business developer	Specialized/regional
AgilePoint		●		
Alpha Software	●			
Alphinat				●
Appery.io	●			
Appian		●		
AuraPortal			●	
Avoka				●
AWPL				●
Bizagi		●		
BMC		●		
BPLogix		●		
Capriza	●			
Caspio			●	
Cherwell				●
ClaySys		●		
Dell Boomi (ManyWho)		●		
FileMaker			●	
FlowForma			●	
Formotus				●
i-exceed	●			
IMIMobile	●			
Intalio				●
Intellect			●	

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FIGURE 6 Vendor Breakdown Within Low-Code App Segments (Cont.)

Vendor	Mobile-first	AD&D pro	Business developer	Specialized/regional
July Systems	●			
JobRouter		●		
K2		●		
Keyed-In Systems				●
Kintone			●	
KISSFlow			●	
Kony		●		
Magic Software	●			
MatsSoft		●	●	
Mendix		●		
Mercato Solutions		●		
MicroFocus (Serena)				●
MicroPACT		●		
Microsoft			●	
MioSoft				●
Mobidio	●			
MobileSmith	●			
M-Power		●		
Nintex			●	
Oracle		●		
OutSystems		●		
PlugBI		●		
PMG		●		

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FIGURE 6 Vendor Breakdown Within Low-Code App Segments (Cont.)

Vendor	Mobile-first	AD&D pro	Business developer	Specialized/regional
Pneuron		●		
PNMSoft		●		
PowWow Mobile	●			
Progress Software		●		
Pulpstream			●	
Quick Base			●	
Rapid Information Systems			●	
Salesforce		●		
Sapho			●	
ServiceNow		●		
Servoy		●		
Simplicite		●		●
Skuid		●		
Slingr			●	
Snappii	●			
Software AG		●		
Tallyfy			●	
Thinkwise				●
TIBCO (Simplr)			●	
Torus Innovations		●		●
Trackvia		●		
Ultimus				●
Visru			●	

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FIGURE 6 Vendor Breakdown Within Low-Code App Segments (Cont.)

Vendor	Mobile-first	AD&D pro	Business developer	Specialized/regional
ViziApps	●			
WaveMaker				●
WhoGloo				●
Work-Relay		●		
Xperiel				●
Zoho			●	
Zudy			●	

Endnotes

[1] For more about the segments in the emerging low-code platform market and how to make a vendor selection that is best for you, see the Forrester report "Vendor Landscape: The Fractured, Fertile Terrain Of Low-Code Application Platforms."

[2] Forrester tracks a large number of the vendors in the low-code platforms market, but not all of them. Thus, revenues for the overall low-code platforms market exceed the revenues of the vendors we track.

[3] Dell acquired ManyWho in an initiative to expand its Boomi cloud-integration platform to become a more general business-applications platform. Microsoft launched its PowerApps and Flow cloud services for citizen developers working mostly with SharePoint and Office365, and in future, Dynamics CRM. Oracle added the Application Builder Cloud Service to its portfolio, announced plans to converge that product with its Mobile Cloud Service and elements of its Integration Cloud Service, and revitalized its Application Express (APEX) tool with a modern declarative developer experience.

[4] Oracle began promoting low-code as a benefit of its public cloud platform during Oracle Open World 2016, and incorporated its low-code products into its 2017 series of Oracle Code events for developers.

[5] Forrester identified five low-code market segments in its 2016 report. They were: general-purpose, process-centric, database-centric, request-handling, and mobile-first. See the Forrester report "Vendor Landscape: The Fractured, Fertile Terrain Of Low-Code Application Platforms."

[6] In the following report, we assess 11 vendors of mobile-first platforms. See the Forrester report "The Forrester Wave™: Mobile Low-Code Development Platforms, Q1 2017."

[7] These four vendors are also the Leaders in the following report. See the Forrester report "The Forrester Wave™: Low-Code Development Platforms, Q2 2016."

[8] LOB developer is the most sophisticated of the nontraditional developer roles commonly called "citizen developers." For a definition, see the Forrester report "How To Harness Citizen Developers To Expand Your AD&D Capacity."

[9] See the Forrester report "The Four App-Delivery Strategies For A Customer-Obsessed Operating Model" and see the Forrester report "Getting Software Delivery Teams Ready For A Customer-Obsessed Business Strategy."

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[10] "We are on the verge of an era in which computers will augment our ability to anticipate, identify, and adapt to changes in our personal and professional lives." For a full explanation of AI-powered user interactions, see the Forrester report "A Framework For Designing AI-Human Interactions."

[11] For our assessment of 14 predictive analytics solutions, see the Forrester report "The Forrester Wave™: Predictive Analytics And Machine Learning Solutions, Q1 2017."

[12] For a complete discussion and advice on how to create a governance policy for low-code platforms, see the Forrester report "Use A Light Touch To Govern Low-Code Development Platforms."

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