

IDC MarketScape: Worldwide Low-Code and No-Code Developer Technologies 2025 Vendor Assessment

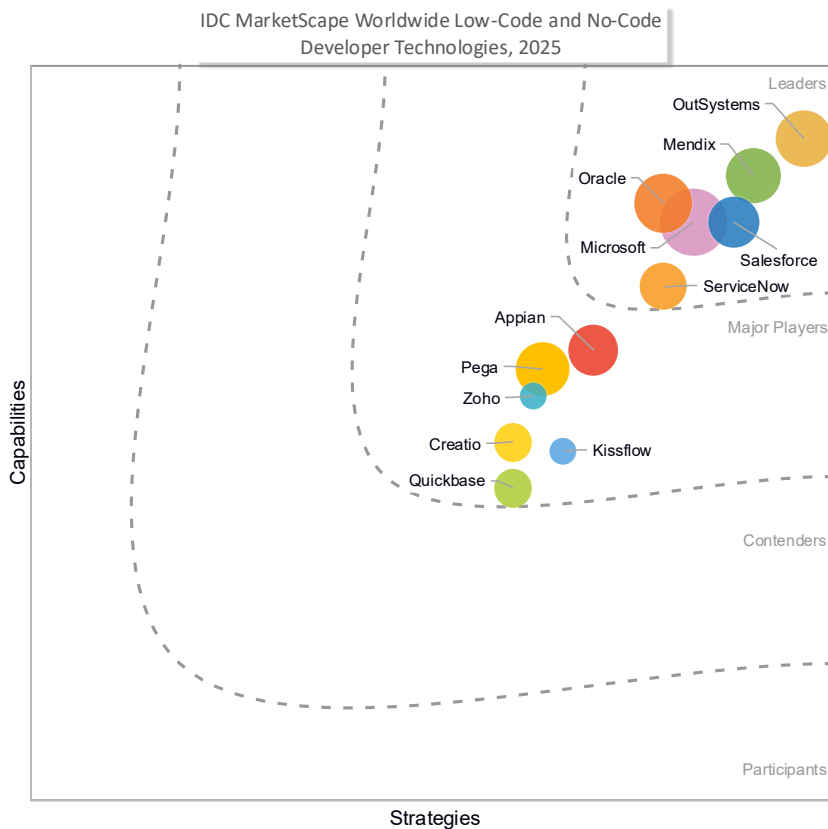
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THIS EXCERPT FEATURES SALESFORCE AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Low-Code and No-Code Developer Technologies Vendor Assessment



Source: IDC, 2025

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Low-Code and No-Code Developer Technologies 2025 Vendor Assessment (Doc # US53669425).

IDC OPINION

Enterprise software development continues to be redefined by the increased adoption of low-code and no-code development platforms. These technologies offer visually guided development interfaces and model-driven workflows that are qualitatively different from conventional IDEs and code editors. Low-code and no-code solutions range from platforms that foreground intuitive drag-and-drop component assembly and visual workflow modeling to those that leverage domain-specific abstractions tailored to particular business requirements. Most platforms enable accelerated delivery of digital applications and offer integration points that allow professional developers to address complex or specialized needs through custom code. In the modern enterprise, low-code and no-code platforms increasingly serve as strategic foundations for application development as well as the deepened integration of AI, generative AI, and agentic AI into digital solutions.

Low-code and no-code development platforms support both general-purpose use cases and specialized needs. General application development platforms meet the requirements of professional developers by offering extensibility and enterprise-grade scalability. Alongside these, a growing selection of industry-focused tools address specific domains such as workflow automation, chatbot development, ecommerce, and verticals like finance, healthcare, and education. This breadth of solutions enables organizations to select technologies that align with their application delivery goals, from rapid prototyping to supporting mission-critical workloads.

A significant trend shaping this landscape is the maturation of generative AI and agentic AI capabilities. Modern low-code and no-code offerings now include natural language interfaces as well as embedded tools for building and managing AI agents. These agents interpret context, coordinate tools, and operate autonomously across business systems, which amplifies the value delivered by enterprise software. In this landscape, low-code and no-code platforms stand at the forefront of agent development, providing the flexibility and architectural rigor needed to drive the next stage of digital transformation. Their central role in the creation, deployment, and orchestration of AI

agents marks a new era — one in which visual design and modular logic define the intelligent systems set to shape the future of enterprise innovation.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

Vendors considered for inclusion in this document satisfied the following criteria:

- **Core functionality as a low-code/no-code platform:** The product must primarily function as a visually guided or model-driven development platform that integrates extensibility through traditional coding.
- **General availability:** The product must be generally available and not in beta or limited release.
- **Availability as a standalone product:** The product must be commercially available as a standalone tool.
- **Enterprise-grade capabilities:** The product must offer features that cater to enterprise users, such as robust security measures, integration capabilities with existing systems, scalability for large-scale applications, and governance tools for IT oversight.
- **Active development and updates:** The vendor must show evidence of active development and regular updates to the platform.
- **Multiplatform or multidevice support:** The product must support development for at least two or more platforms or device types (e.g., web, mobile, desktop).
- **Target audience — professional developers:** The product should be designed for use by professional software developers, engineers, or development teams, offering advanced features and capabilities that cater to their expertise.
- **AI/ML integration:** The product should incorporate some level of AI/ML capabilities to enhance the development process, such as basic intelligent suggestions or automated workflows.

ADVICE FOR TECHNOLOGY BUYERS

Clearly Define Business Needs and Use Cases

Begin with a thorough analysis of the organization's development priorities and operational pain points. Catalog the processes, workflows, or customer interactions you aim to improve or automate, and tie each to measurable outcomes such as cycle time reduction or revenue lift. Identify whether the primary driver is rapid prototyping, internal automation, customer engagement, or legacy modernization, then map those drivers to the specific platform capabilities required. Assess the technical proficiency of

target users — business analysts, professional developers, or nontechnical staff — to estimate training and support demands. A well-documented requirements profile keeps evaluations focused and prevents costly mismatches between expectations and reality.

Assess Customization Depth

Low-code products vary widely in how deeply you can tailor them. Test the ease of adding custom logic, UI components, and external APIs when built-in widgets fall short, and document constraints on data model complexity, workflow branching, and page-level styling. Verify whether you can inject handwritten code or leverage open source libraries for specialized functions that emerge later. Explore marketplace extensions to see how much can be accomplished without reinventing the wheel. Understanding customization ceilings early protects you from rework and premature platform abandonment.

Validate Scalability and Performance

Even the most flexible platform fails if it cannot handle growth. Stress-test the environment with large data sets, peak transactions, and geographically dispersed users to measure response times and throughput. Review vertical and horizontal scaling options such as autoscaling, sharding, and high-availability clusters, and confirm any licensing implications. Examine published benchmarks, customer references, and SLAs that guarantee uptime and latency targets. Proven scalability safeguards user experience and avoids future replatforming costs.

Prioritize Integration Capabilities

Effective integration often determines whether a project succeeds. Inspect the library of prebuilt connectors for ERP, CRM, HRIS, cloud services, and databases, confirming bidirectional data flow and robust error handling. Verify support for REST, GraphQL, message queues, and event streams so new apps can communicate reliably with existing middleware and microservices. Evaluate data mapping, API version control, and transformation tooling to maintain data lineage as systems evolve. Strong integration minimizes silos and enables broader process automation across the enterprise.

Assess Security, Compliance, and Governance

Rapid delivery offers little value if security or compliance is compromised. Examine role-based access control, SSO, MFA, and encryption of data in transit and at rest, ensuring alignment with corporate policy. Confirm that audit logs capture administrative actions, data changes, and user activity in a tamper-evident format suitable for regulators. Look for built-in policy engines or guardrails that let IT enforce

coding standards and manage application sprawl without stifling agility. Robust governance protects the business while empowering fast iteration.

Evaluate Vendor Support, Community, and Road Map

Responsive vendor assistance minimizes downtime and accelerates problem resolution. Compare support tiers, guaranteed response times, and access with customer success resources such as solution architects or onboarding specialists. Gauge community vitality through forums, user groups, and marketplaces, noting how often documentation, templates, and plug-ins are refreshed. Study the public road map for sustained investment in security, scalability, AI, and regional compliance features. A lively ecosystem and transparent vision signal a partner committed to evolving alongside your development needs.

Evaluate Generative and Agentic AI Capabilities

Modern platforms increasingly embed AI that writes code, designs workflows, and orchestrates autonomous agents. Investigate how effectively natural language prompts translate into application artifacts and whether the tool supports bring-your-own-language models or private deployments. Check for policy controls that govern model usage, manage API keys, and mitigate privacy, bias, or cost risks. Examine observability features that track agent behavior, accuracy, and resource consumption in production. Strong generative and agentic capabilities compress development cycles and unlock novel intelligent use cases.

Align with Existing Database Architecture and Data Strategy

Data gravity strongly influences time to value for new applications. Verify native connectors, real-time change data capture, and optimized queries for the relational, NoSQL, and cloud warehouse engines already in place. Confirm secure credential storage, granular permissions, and lineage tracking to uphold governance mandates. Evaluate how easily developers can model, transform, and cache data without spawning redundant silos. Tight alignment with your data estate accelerates delivery and powers higher-quality analytics and AI.

Assess Learning Curve and Enablement Resources

Adoption speed hinges on how quickly teams become productive. Review the depth of documentation, interactive tutorials, sandbox environments, and certification tracks aimed at both business developers and professional engineers. Look for active forums, office-hour webinars, and mentorship programs that foster peer-to-peer knowledge sharing. Gauge the vendor's commitment to keeping educational content in sync with new releases. Robust enablement lowers support costs and sustains momentum as new users onboard.

Demand DevOps and Life-Cycle Tooling

Enterprise applications require disciplined change management even when built visually. Confirm reliable integration with popular version control systems in addition to support for branching, pull requests, and automated testing frameworks that align with existing pipelines. Examine CI/CD capabilities for environment promotion, one-click rollbacks, and infrastructure-as-code features that standardize deployments. Assess built-in telemetry and observability tools that alert teams to performance regressions before users notice. Solid DevOps alignment lets low-code apps mature alongside traditional software under unified governance.

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Salesforce

After a thorough evaluation of Salesforce's strategies and capabilities, Salesforce is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide low-code and no-code developer technologies.

Company Overview

The unified Salesforce Platform has expanded its focus to agent development with the introduction of Agentforce. Launched at Dreamforce 2024, Agentforce is transforming how businesses automate workflows, enhance the customer experience, and improve productivity. The Agentforce Agent Builder provides an intuitive, low-code environment for designing, configuring, and previewing AI agents, allowing teams to define agent roles, assign actions, and leverage prebuilt topics using natural language inputs. Integrated directly with Salesforce Data Cloud, Agentforce ensures these agents have real-time access to unified customer and operational data across structured and unstructured sources, enhancing the relevance and accuracy of agent-driven automation.

Beyond Agentforce, Salesforce offers a comprehensive suite of low-code development capabilities designed to accelerate application delivery and empower a broad range of users. Lightning App Builder enables users to drag and drop components and customize layouts without writing code, while Flow Builder allows for the automation of complex business processes through a visual interface. Experience Builder further extends these capabilities, allowing teams to create tailored sites, help centers,

storefronts, and portals with flexible design and branding options. These low-code solutions help organizations rapidly create, automate, and adapt business applications to meet evolving needs.

Quick facts about Salesforce include:

- **Founded:** 1999
- **Headquarters:** San Francisco, California
- **Technology foundation:** Multitenant cloud architecture
- **Pricing model:** Subscription based with tiered licensing
- **Deployment options:** Salesforce Cloud (primary), hybrid through APIs
- **IDE integration:** Proprietary tools including Lightning App Builder, VS Code, Cursor, Windsurf
- **Latest features:** Agent builder, Agentforce Testing Center, Agentforce API, Agentforce for Developers
- **Notable capabilities:** Include autonomous agent creation and deployment with Agentforce, low-code/no-code agent development, integration with Salesforce Flow and Data Cloud, and the AgentExchange marketplace for prebuilt agents (Additional strengths include Lightning App Builder for customizing and extending the Salesforce experience, Experience Builder and CMS for creating custom sites and portals, Mobile Builder for mobile app development, and DevOps Center for application life-cycle management.)

Strengths

- **Enterprise agent development ecosystem:** Salesforce Platform with Agentforce provides a robust ecosystem for building, testing, and deploying enterprise-grade AI agents. The Agent Builder and Agentforce Testing Center support intuitive agent design, configuration, and rigorous validation, while a library of low-code templates enables developers to accelerate agent creation for common roles and use cases. Deep integration with Salesforce Data Cloud ensures agents operate with real-time, unified customer and operational data, enabling context-aware automation at scale.
- **Low-code and pro-code tools for agent development:** Agentforce delivers a comprehensive toolset that includes Agent Builder for low-code agent creation, Experience Builder for designing agent-driven user experiences, and Agentforce for Developers for advanced customization. This combination allows teams to rapidly configure agents using natural language or extend functionality through code, meeting a wide range of enterprise requirements. The platform's flexibility supports both visual development and pro-code workflows, ensuring sophisticated agents can be built and optimized efficiently.

- **Scalability, enterprise integration, and Agentforce API:** Agentforce is architected for scalability, supporting seamless integration with Salesforce Data Cloud and the broader Salesforce ecosystem as organizations grow. The Agentforce API enables customers to invoke agents from external systems, websites, or applications, embedding agentic automation into diverse business processes. This approach ensures agents can orchestrate workflows across multiple environments, maintain data consistency, and deliver secure, enterprise-grade automation.
- **Collaboration and observability across teams:** The platform fosters collaboration by providing shared development environments, intuitive tools, and real-time analytics for both technical and business stakeholders. The Agentforce Testing Center and observability features enable cross-functional teams to supervise, debug, and optimize agent performance collectively. This collaborative framework ensures agent-driven solutions align with business objectives, regulatory requirements, and operational best practices.

Challenges

- **Platform complexity:** The breadth of Salesforce's capabilities introduces complexity that can be challenging for teams new to the platform. Professional developers may face a significant learning curve to fully leverage the platform's capabilities for mission-critical applications, potentially extending initial development timelines.
- **License cost structure:** Salesforce's enterprise capabilities are accompanied by license costs that can be significant, especially for complex, multicloud deployments. The availability of Flex Credits and consumption-based pricing for Agentforce offers customers more flexibility to align costs with usage. Organizations should assess total cost of ownership, including licensing, implementation, and ongoing maintenance.

Consider Salesforce When

Salesforce delivers outstanding value for organizations of all sizes seeking to implement AI agent-driven automation and develop mission-critical applications that integrate with or extend CRM capabilities. The platform is well suited for both enterprises with significant Salesforce investments and small and midsize businesses (SMBs) looking for scalable, affordable solutions — thanks to flexible editions and AI-powered tools like Agentforce that streamline workflows, enhance customer experiences, and improve productivity. Companies across industries such as financial services, healthcare, retail, and professional services will find Salesforce's unified platform, robust data management, and agentic AI capabilities closely aligned with the demands of modern, business-critical systems, regardless of organizational scale.

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

Low-code and no-code developer technologies are platforms and tools designed to streamline the creation, deployment, and management of applications through both visually guided and model-driven development approaches. These technologies enable professional developers to work more efficiently by leveraging intuitive visual interfaces, drag-and-drop components, and high-level abstractions for defining

application logic, workflows, and data models. By reducing the need for manual coding in routine or repetitive tasks, these platforms allow developers to focus on complex problem-solving and innovation. As a result, organizations benefit from accelerated project timelines, enhanced collaboration across teams, and the agility to rapidly respond to evolving business needs.

LEARN MORE

Related Research

- *Agentforce 2dx: Enhancing AI Agent Development with the Agentforce API and the New Salesforce Developer Edition* (IDC #US53269825, March 2025)
- *Salesforce Agentforce 2dx: Redefining AI Agent Development for the Enterprise* (IDC #US53269625, March 2025)
- *Salesforce Agentforce: Redefining Industry Dynamics with Autonomous and Assistive AI Agents* (IDC #AP52956025, February 2025)
- *Salesforce Launches Agentforce 2.0, Advancing the Billion-Agent Challenge and Paving the Path for a Digital Workforce* (IDC #lcUS53045124, December 2024)
- *With Agentforce, Salesforce Bets Big on GenAI* (IDC #EUR152702524, November 2024)

Synopsis

This IDC study examines the landscape of low-code and no-code developer technologies.

"Low-code and no-code technologies are evolving beyond traditional application development platforms, emerging as foundational tools for agent builders and agentic development. These platforms now enable professional developers to design, orchestrate, and deploy autonomous, AI-powered agents with greater speed and flexibility. As AI capabilities become more deeply integrated, low-code and no-code solutions are transforming into robust environments for building intelligent, agent-driven systems — streamlining complex workflows and accelerating the creation of next-generation software solutions. This shift is redefining how professional developers approach software architecture, positioning these platforms at the center of enterprise innovation." — Arnal Dayaratna, research vice president, Software Development at IDC.

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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