

Magic Quadrant pour les outils d'architecture d'entreprise

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Les outils d'EA aident à imaginer, modéliser et planifier l'avenir de l'entreprise, en offrant des fonctionnalités permettant de faire évoluer en permanence les modèles commerciaux et opérationnels. Les responsables de l'architecture d'entreprise doivent sélectionner des outils d'EA qui soutiennent les objectifs de transformation, de modernisation et d'innovation à long terme.

Définition/description du marché

Gartner définit le marché des outils d'architecture d'entreprise comme des outils permettant aux organisations d'examiner à la fois la nécessité et l'impact du changement. Ils permettent aux utilisateurs de capturer les interrelations et les interdépendances au sein et entre un écosystème de partenaires, de modèles opérationnels, de capacités, de personnes, de processus, d'informations, d'applications et de technologies. Ils fournissent un référentiel central pour capturer les données et les métadonnées sur les artefacts qui intéressent une entreprise et leurs cycles de vie associés. Les modèles représentent les relations entre ces artefacts et sont eux-mêmes traités comme des actifs qui aident à décrire et à façonner l'avenir de l'entreprise.

Les outils d'EA fournissent un moyen de modéliser les aspects commerciaux et informatiques de l'entreprise pour soutenir l'obtention de résultats commerciaux. Cela nécessite la collaboration de plusieurs parties prenantes au sein de l'organisation, chacune jouant un rôle différent à un moment différent. Les modèles et méthodes utilisés par les parties prenantes varieront en fonction de leur rôle et doivent être intégrés et connectés à d'autres modèles pour être utiles. Pour répondre à ces besoins, les outils d'EA présentent deux aspects. Le premier fournit un environnement de modélisation, ainsi qu'un référentiel de support. La seconde facilite la collaboration entre un groupe diversifié de parties prenantes au sein de l'organisation, depuis la stratégie commerciale jusqu'à l'informatique.

Un large éventail de disciplines architecturales et informatiques, telles que les affaires, l'information, les solutions, la sécurité, les applications et l'infrastructure, utilisent les outils EA. Les outils d'EA fonctionnent à plusieurs niveaux et sur un large spectre pour fournir des informations et soutenir une prise de décision éclairée. Avec un si large éventail de parties prenantes, les outils d'EA doivent également faciliter leur consommation et leur contribution aux

informations contenues dans le référentiel. Au fur et à mesure qu'ils entreprennent leur travail, ces utilisateurs basculent entre un ensemble toujours croissant de vues et de représentations visuelles des ensembles de données contenus dans le référentiel.

Les capacités standard pour ce marché comprennent :

1. **Référentiel** : fournit une source unique de vérité pour l'organisation avec le stockage, la catégorisation et la gestion des versions d'objets, de modèles et d'artefacts de diverses sortes, ainsi que les relations entre eux, ainsi que les artefacts et vues métier associés.
2. **Modélisation** : structure les relations entre les entités, telles que les stratégies commerciales, les objectifs, les buts, les contraintes, les capacités, les personnalités, les parcours clients, les activités, les processus, les flux de valeur, les politiques, les modèles de décision, les mesures, les applications, les technologies, les feuilles de route, les projets et les programmes.
3. **Présentation** : affichages et illustrations d'informations sous forme de tableaux de bord, de cartes thermiques, de modèles et de scénarios qui contribuent à la capacité de présentation de l'outil. Une variété de présentations visuelles aide les collègues à comprendre et à évaluer les impacts associés aux décisions et aux solutions proposées.
4. **Analyse** : identifier, évaluer, hiérarchiser et suivre les lacunes, les défis, les opportunités et les risques au sein et entre les portefeuilles de capacités commerciales, d'investissements, de processus, de projets, d'applications et de technologies.
5. **Configuration et gestion** : fonctionnalités de configuration et d'administration pour prendre en charge la sécurité de l'outil EA, ainsi que la configuration de différentes classes d'utilisateurs, de leurs droits d'accès et de l'alignement des fonctionnalités, y compris le contrôle de l'accès aux informations stockées dans le référentiel.
6. **Publication** : permet une large consommation des données contenues dans l'outil EA dans toute l'entreprise et au-delà. Les outils doivent également être capables de capturer des commentaires et des retours sur ce contenu et/ou de noter les éléments contenus dans les vues du référentiel.
7. **Intégration** : exposez et importez des données vers et depuis d'autres produits, permettant à l'outil EA d'être une plate-forme réunissant d'autres outils communs dans l'écosystème technologique de l'entreprise. Cela inclut des catégories telles que la gestion de produits, la base de données de gestion de configuration (CMDB), PPM, la suite de gestion des processus métier (BPMS) et l'exploration de processus.
8. **Extensibilité** : étendez le métamodèle de l'outil EA grâce à la définition de nouveaux concepts de modélisation et types de relations, jusqu'à de nouvelles représentations graphiques et à l'application de règles spécifiques au domaine.
9. **Gestion de l'innovation** : mécanismes qui soutiennent la création et le suivi des initiatives d'innovation et de changement. Cela inclut le soutien à l'idéation, à l'identification des tendances et à l'engagement des collègues, aux liens PPM et à la réalisation des avantages.

10. **Automatisation intelligente** : fonctionnalités assistées par l'IA et automatisées qui aident les praticiens de l'EA à industrialiser leurs activités et leurs résultats, en apportant de la valeur plus rapidement et de manière plus fiable, tout en gardant les informations à jour et à jour. Ces fonctionnalités doivent se concentrer sur les fonctionnalités d'automatisation des processus et des politiques utilisées au sein de l'outil (plutôt que servies en externe).
11. **Frameworks** : point de départ pour structurer le référentiel et les relations entre les artefacts, en se concentrant sur la prise en charge de différentes méthodes architecturales et modèles industriels verticaux. Cela inclut un soutien dans le choix des cadres d'évaluation environnementale à adopter et dans l'identification des chevauchements et des lacunes.

Quadrant magique

Figure 1 : Magic Quadrant pour les outils d'architecture d'entreprise



Source : Gartner (novembre 2023)

Points forts et mises en garde du fournisseur

Ardoq

Ardoq est un leader dans ce Magic Quadrant. Les fonctionnalités du produit Ardoq sont fournies sous la forme d'une solution SaaS cloud native. Ses principales opérations et sa présence se situent dans la région EMEA et se développent en Amérique du Nord. Ardoq accompagne ses clients dans de nombreux secteurs, les services financiers, la santé et le secteur public étant les principaux. Sa feuille de route comprend l'ajout d'autres cas d'utilisation tels que la stratégie d'exécution et le risque technologique ; fonctionnalité d'inférence pour générer automatiquement des architectures et des données synthétiques pour la formation du ML ; et l'extension des interfaces en langage naturel pour personnaliser les parcours utilisateurs.

Forces

- **Développement et déploiement de métamodèles évolutifs** : le référentiel cloud natif est très flexible et adaptable. Le métamodèle est développé et déployé de manière évolutive, fournissant juste assez de structure pour répondre aux besoins du cas d'utilisation actuel. Il bénéficie de fonctionnalités de plateforme cloud natives telles qu'un branchement de style Git d'éléments et de modèles architecturaux pour créer plusieurs états futurs séquentiels ou simultanés, et de sa base de données de graphiques en mémoire pour prendre en charge des analyses complexes.
- **Optimisation de l'expérience utilisateur** : Ardoq maintient l'expérience utilisateur et l'interaction au cœur de ses préoccupations grâce à une interface utilisateur personnalisée, une fonctionnalité de narration intégrée, un robot pour traduire les questions en langage naturel dans des requêtes graphiques et un chat dans l'application pour obtenir de l'aide. Ses fonctionnalités d'enquête et de collaboration sont complétées par une capacité d'intégration de flux de travail dédiée pour l'ingestion de données provenant de produits tiers, notamment ServiceNow et Jira.
- **Livraison de valeur basée sur des cas d'utilisation** : la plupart des clients commencent avec les cas d'utilisation prédéfinis d'Ardoq pour répondre aux défis commerciaux ou informatiques courants. Les cas d'utilisation fournissent des fonctionnalités préconfigurées, notamment l'interface utilisateur, l'analyse et la visualisation, pour réduire le délai de rentabilisation par rapport à un problème informatique et/ou commercial défini.

Précautions

- **La maturité a un coût** : le package de base d'Ardoq fournit des fonctionnalités produit permettant de fournir un ou plusieurs cas d'utilisation de bout en bout, notamment des intégrations, des modules de bonnes pratiques, des rapports et des analyses, des enquêtes et des présentations. Cependant, pour tirer pleinement parti des fonctionnalités d'engagement et de gouvernance d'Ardoq, les clients devront acheter des modules complémentaires tels que Discover, Broadcasts and Scenarios, Sandbox Environment et REST API.
- **Scaling support to maintain quality**: Ardoq continues to recapitalize to fund expansion, but roughly 81% of its resources are Europe-based. With a strong consulting/advisory segment as part of its value proposition, a relatively small team and some large marquee clients, scaling support of the business will be a challenge. Although the Partner Certification program seeks to

address this, potential and existing customers should verify the vendor's approach and capabilities to sustain product performance and evolution.

- **Limited region focus:** Ardoq's main marketing, sales and client focus is European and North American organizations with an existing EA function. It relies on partners for growth in other regions. Prospective customers outside the vendor's main regions should verify its local partner capabilities, as well its partner positioning to process local requirements, including regulations. Hosting options for its product include the U.S., EU, Australia and the United Arab Emirates (UAE).

Avolution

Avolution is a Leader in this Magic Quadrant. Its ABACUS product is delivered as a fully hosted SaaS solution, on-premises or as a hybrid cloud offering. It has customers in several industries, including banking and securities, insurance, utilities, manufacturing, and natural resources. Its operations are spread across EMEA, North and Latin America, and the Asia/Pacific region. Its future plans include AI/ML enhancement to Ask ABACUS, a UI refresh, improved support for internal client branding of UI, and improvements to support accessibility and framework updates, including the NIST AI Risk Management Framework.

Strengths

- **Broad appeal to customers with varying maturity across regions and industries:** While less mature organizations can leverage Avolution's Rapid Start Program with embedded frameworks and libraries, mature organizations benefit from support to automate analysis of models in the repository with metrics aggregation and rapid scenario planning. Outreach to global clients is reflected in regional events and the vendor's support for 13 hosting locations distributed across North and Latin America, EMEA, and the Asia/Pacific region. Its industry accelerator packages provide faster speed to value for industry-specific contexts.
- **Support for security architecture:** Avolution continues to invest in its product to support cloud- and security-architecture-focused documentation with cloud library updates and NIST cybersecurity modeling capabilities to facilitate the management and communication of risk and security.
- **AI/ML-enhanced user experience:** Use of no-code algorithms enables business and nontechnical users to quickly build analytics for a variety of architecture questions. ML capabilities help improve repository data completeness, consistency and quality, including the ability to suggest strategies and detect data anomalies that may require attention.

Cautions

- **Flexibility comes at a cost:** Avolution offers ABACUS in a variety of user- and feature-based models, with tiered pricing and discounts. It also offers a la carte options, per-user-based pricing and paid add-on modules. This flexibility requires clients to assess their product use cases (and add-ons) over time to account for potential increases in product spend for budgeting purposes.

- **Steep learning curve:** Evolution continues to take steps to simplify the user experience. Even so, tailoring the tool to an organization's specific needs and learning to use the modeling and visualization features can bring a steep learning curve.
- **Operational responsiveness:** Limited in-house professional services and support space may result in a slower-than-expected response to client requests. This could impact responsiveness and delay tool issue resolution, potentially impacting clients' EA tool projects and decision making.

Bee360

Bee360 is a Niche Player in this Magic Quadrant. Its primary EA product is called Bee360 and is available in on-premises, hosted or private cloud versions. Bee360 replaces Bee4IT and provides tooling to help manage EA, strategic portfolio and resource management, enterprise agile planning, IT finance and digital twins for organizations within a single repository. Bee360 has its central operations in EMEA and a service center in the Asia/Pacific region, supporting clients worldwide. Its future plans focus on improving blueprint visualizations and survey modules to promote further engagement among business stakeholders. Bee360 has moved away from targeting specific markets and is focused on targeting C-suites, regardless of industry.

Strengths

- **Pragmatic approach to support variety of roles in IT value chain:** Bee360 positions its product to support "holistic IT management," which aims to create a uniform view of management areas, including strategic portfolio management, EA management and IT financial management.
- **Thoughtful and efficient onboarding process:** Bee360 includes training and enablement features to reduce the learning and adoption time of the product and its features. It allows customers to add context and explanation to their own metamodel and assets, as well as predefined content for standard business and IT processes to apply in modeling and training. Bee360 also provides multiple contextualized Excel templates, which can be downloaded, populated and uploaded to quicken the setup process.
- **Lightweight license option:** Bee360 has introduced the TEAM license, which supports a small number of users who want to try the platform, without the ability to customize. While the TEAM license does have technical limitations (no interfaces to Azure AD), it does offer full functionality of both processes and content, with the intent of quick proofs of concept. The TEAM license has simplified entry to the tool before transitioning to the enterprise license as organizational needs grow.

Cautions

- **Primary focus on IT management:** Bee360's main features and capabilities remain focused on maximizing value from IT. It offers a limited set or predefined assets for business architecture, where business capabilities and a broader business design play an important part in delivering

on business outcomes and defining business operating models. Bee360 requires customers to create their own custom artifacts in support of business architecture.

- **No embedded industry-or regulatory-specific assets:** Bee360 has no embedded industry-specific assets, nor embedded coverage for industry or regulatory frameworks. It continues to rely on individual account manager experience and its partner capabilities to address industry demands.
- **Limited operations and presence:** While Bee360 is mainly established in EMEA, and partially established in the Asia/Pacific region, there is no employee presence within North America or Latin America, which may increase response times if support is required. Bee360 hosting options are limited to Germany, and the vendor depends on partner offerings to host elsewhere.

Bizzdesign

Bizzdesign is a Leader in this Magic Quadrant. The Bizzdesign product Horizon is delivered as a fully hosted SaaS solution, on-premises or as a hybrid configuration. Its main presence is in EMEA and North America, and is growing in the Asia/Pacific region. Bizzdesign supports a broad range of industries, including financial services, public/defense, manufacturing, pharma and education. The Horizon product roadmap includes seamless interplay with ServiceNow, Smart EA Assistant and a “How to Coach” guide to help customers on their EA maturity journeys.

Strengths

- **Cloud deployment benefits:** Horizon has been fully cloud hosted, benefiting from a multitenant, distributed platform architecture, since 2021. This has elevated the availability and resiliency of Horizon and enabled a more frequent cadence of updates, and offers further configurability and extensibility.
- **Innovation driven through customer experience:** Bizzdesign has invested in a new customer experience research team and, as a result, has increased the throughput of ideation, prototyping, testing and validation of new ideas. The strategy has resulted in incorporating the use of ML in model creation and additional solution packs focusing on assessing operational resilience and organizational change capability.
- **Industry expert partnerships:** Bizzdesign partners with different subject matter experts to create industry-specific assets. This includes creating Business Architecture Body of Knowledge (BIZBOK) industry models and partnering with NATO on the development of an ArchiMate framework for defense, as well as creating regulation-driven assets for financial services operational resilience and for the Open Group Commercial Aviation Reference Architecture.

Cautions

- **Limited geographic presence:** While its partner network continues to grow globally, the majority of Bizzdesign sales and resources are focused on EMEA and North America. Other regions are predominantly represented by third-party partners, although Bizzdesign is growing its direct presence in the Asia/Pacific region.

- **Modular pricing can increase cost:** Bizzdesign has developed a modular platform with a low-price entry point, but to benefit from the breadth of Horizon features, product costs can rise for customers. Although providing extra flexibility, the combination of module, credit-based pricing, license type and consulting can be confusing for customers.
- **Limited operational support:** While it offers 24/7 SLA-based support for critical incidents, the vendor's main SLAs provide local office hour support only. Premium SLA 99.9% availability comes at an extra cost that is based on the percentage of software/SaaS spend. Prospective customers should ensure that SLAs include support for the hours they need for their business, for every region in which they require support.

BOC Group

BOC Group is a Leader in this Magic Quadrant. Its product ADOIT is offered as a SaaS solution, on-premises or as a hybrid cloud proposition. Most of its customers are in EMEA, with modest growth in North America, Latin America and the Asia/Pacific region, and they are spread across the financial services, manufacturing, telecommunications, pharmaceutical, retail and energy industries. ADOIT's future plans include continued development of user-centric services, combining strategy, design thinking and EA best practices to guide users through use cases, as well as broader application of AI/ML mechanisms across the platform.

Strengths

- **User-focused proposition:** ADOIT's user-centric services enable teams to quickly focus tool usage on targeted use-case outcomes, allowing customers to generate value more efficiently, and are particularly valuable for nonarchitect users. Several user-centric services are provided out-of-the-box, such as capability-based planning, strategic roadmapping, and risk and opportunity assessment. These can be modified and additional services can be developed by the EA tool administrator.
- **Efficient pricing model:** Starting with a "freemium" offering to its cascading Start, Grow and Individual paid tiers, BOC Group allows clients to choose between multitenant, single-tenant and hybrid hosting with increasing capabilities and support add-on features at cost. The pricing model supports transparency and uses gross domestic product (GDP) mechanisms to flex prices regionally.
- **Intelligent recommendations and suggestions:** BOC Group has continued to augment ADOIT's ML capabilities to support recommendations for application investment strategies and a smart modeling assistant for ArchiMate diagrams, including automatic dual-view generation between diagrams and management dashboards.

Cautions

- **Limited geographic footprint:** Although BOC Group has invested in its global sales resources, its core operational resources are in EMEA, with customers primarily based in Europe but gradually diversifying. Organizations with global distributed operations will therefore need to assess the combined support capabilities from BOC Group and its partners for all their regions.

- **Rebranding capabilities:** BOC Group has rebranded ADOIT to a persona-focused offering and is targeting audiences in strategy and innovation management spaces beyond EA. To maintain its position in the EA tool market, it must continue investing in education and support for existing clients in the EA space, while increasing assets and partner capabilities for the persona-focused proposition.
- **Evolving cloud capabilities:** Although ADOIT is primarily provided via SaaS and its new user-centric services are adopting cloud-native technology, the core of its architecture is positioned as a traditional client/server model. For its SaaS offering, data residency is primarily in EMEA, with non-EMEA data residency options being planned. Moreover, the vendor is not yet SOC 2-compliant, which organizations increasingly demand for information security.

Capsifi

Capsifi is a Leader in this Magic Quadrant. Its product, Jalapeno, is primarily available as a SaaS offering. Capsifi operations are primarily Asia/Pacific-based, with a growing presence in North America and Europe. Its clients are predominantly in the financial services, insurance, telecom, retail and public sectors. Future plans for Jalapeno include a rollout of its new technology stack, an overhaul of its user interface (UI)/user experience (UX) and an embedded AI-enabled language model.

Strengths

- **Focus on adapting to continuous change in customers:** With continuous change as a guiding design principle, Jalapeno is built around a semantically aligned knowledge graph and an ontology that supports changes to customers' business and operating models. It supports a wide range of functionality, including role-specific consoles with contextual insight to manage business innovation and transformation. Emphasis on low-code authoring tools provides a simpler path for contributions and additional engagement opportunities for non-EA users.
- **Robust and dedicated "partner-first" strategy:** Capsifi has leveraged its powerful partner network to accelerate time to value for new customers by providing complementary Jalapeno environments to rapidly upskill partner teams. This has quickened the creation and availability of industry-specific assets, and provides customers with a smoother onboarding process.
- **Implementation pathways reduce time to value:** Capsifi has created multiple Jalapeno implementation templates to shorten time to value for clients, which it calls "pathways." These templates reflect the most common use cases for business transformation, including setting strategic directions, optimizing operations, defining and building transformation capabilities, capturing and benefiting from customer insights, and governing all changes.

Cautions

- **Balancing quality with continued growth:** Although Capsifi added more than 64% in unique customers over the past year, its client base is still limited. Considering its size and ambitious roadmap of changes, it may be challenged to maintain product and support quality. Potential

and existing customers should verify Capsifi's ability to sustain customer support, and product investment and enhancement.

- **Implementation and support at a cost:** Capsifi includes dedicated product coaches as a first point of contact for onboarding and ongoing support, as part of customers' licenses. However, they are constrained to an hourly allotment (based on license tier), and additional expense is incurred for the professional services associated with the deployment of Jalapeno implementation pathways. Without these services, implementing Jalapeno and realizing its benefits may become a trial-and-error process.
- **Geographically constrained:** Capsifi is based in Australia and, while a growing proportion of its clients are based in North America, its employee base is still primarily located in Australia, which may create challenges for customers working directly with the vendor. Potential customers located outside of the Asia/Pacific region should verify availability of timely implementation and support services.

Enterprise Architecture Solutions

Enterprise Architecture Solutions (EAS) is a Visionary in this Magic Quadrant. Its product is based on the installable open-source Essential Project with public cloud-hosted subscription editions, or licensed as a Docker instance for on-premises or private cloud. With a small user base spread across Europe, North America and the Asia/Pacific region, it derives most of its revenue from customers in government, retail, consulting, financial services, education and entertainment. The Essential product roadmap includes support for GenAI use cases; Environmental, Social and Governance (ESG) Pack; Federating operating model; and technical debt life cycle management.

Strengths

- **Highly disruptive approach to pricing:** As a full open-source solution, its pricing model is not per-user-based, but a fixed low subscription fee independent of the number of users. EAS positions its tool as an enabler of enterprise architects and closely aligns it with its EA consulting services. While for small teams there are lower-cost propositions in the market, Essential's product pricing becomes unrivaled with a growing user base per client organization.
- **Strong understanding of the EA market direction:** EAS has drawn on its market understanding to position the Essential product as a tool that supports enterprisewide collaboration on digital transformation. By providing a broad range of role and persona-based insights with free format commenting and ideation, it supports alignment across the enterprise and enables coordinated change and a rationalized IT portfolio.
- **Empowering users through customized client playbooks:** EAS uses lessons learned from its EA consulting services to improve its tool application playbook for new clients. Through a rule-based-engine-driven survey, the Essential product provides clients with a specific playbook on their most effective path to realize value with the tool, given their EA maturity, goals, stakeholder engagement levels, and access to and quality of data.

Cautions

- **Small market presence:** With its open-source, self-serve and low-cost business model, EAS is leveraging third-party support to augment its own resources. For long-term success and increasing market share, it must identify cost-effective ways to market its product and unique selling point.
- **Reliance on its own metamodel:** EAS primarily relies on its framework-agnostic metamodel. It does provide some American Productivity & Quality Center (APQC) industry models, and its own industry templates, but offers no standard control or delivery frameworks or templates. To rapidly ramp up Essential benefits, potential clients should first assess whether Essential's self-service options or EAS consulting capabilities support their use case.
- **Scaling business operations:** As a more recent entry into the EA tool market, EAS has not yet demonstrated scalability of its business model, with limited resources relative to its competitors with a small customer base. It remains to be seen if the vendor's business can scale while maintaining its highly competitive pricing model. Potential customers should set expectations upfront for a level of service for implementation and ongoing support that will meet their needs.

LeanIX

LeanIX is a Leader in this Magic Quadrant. LeanIX Enterprise Architecture Management is a cloud-native SaaS product offered on Azure. LeanIX has direct operations in North America and EMEA, with a strong customer presence in manufacturing, pharmaceutical and finance. LeanIX's future plans include updates to its evolved metamodel, an integrated presentation mode, a new executive dashboard, additional training courses and certifications, and additional AI capabilities.

In September 2023, SAP announced its intent to acquire LeanIX.

Strengths

- **Strong growth and market momentum:** LeanIX continues to grow its customer base, adding 329 new logos in 2022. The vendor targets organizations engaged in multiyear programs, such as digital transformation, migrating from on-premises infrastructure to the cloud or moving from project to product, to embed itself in the success of those programs.
- **Rapid time to value and focused customer success program:** LeanIX promises fast time to value and dedicated customer success programs, which guide customers through onboarding and regular check-ins, build success roadmaps, and provide integration and engineering guidance. The rapid time to value is driven by a simplified metamodel, refreshed in 2023, combined with an easy-to-use platform and easy access to support.
- **Continued enhanced user experience, data, AI and workflow:** LeanIX has completed its transition to diagrams.net for visual modeling to optimize the user diagramming experience and to support standard collaboration tool integrations. The vendor rolled out its AI Assistant to ease data management. No-code automation now supports triggered actions on events to create workflows. Out-of-the-box integration with Collibra offers insight into enterprise data.

Cautions

- **ERP focus may limit broader appeal:** SAP's recent announcement of its intent to purchase LeanIX, along with LeanIX's SAP Endorsed Apps certification, overlooks the potential diversity of clients' ERP ecosystems.
- **EAM base module lacks breadth:** Entry-level LeanIX leans on application portfolio management (APM) capabilities, meaning that clients wishing to benefit from the full EA tool scope will require Business Transformation Management (BTM) and/or Technology Risk Management (TRM) add-on modules at an additional cost. LeanIX integrates SAP Signavio out of the box to support business process management, but requires additional licensing costs.
- **Application-centric approach limits business architecture visibility:** Although LeanIX's evolved metamodel further enhances the business architecture layer as part of this year's updates, business architecture – as a core capability for LeanIX – lacks visibility and clarity. This may cause potential customers to perceive it as an "IT-only EA product," which could exclude it from clients' lists of candidate products.

MEGA International

MEGA International is a Leader in this Magic Quadrant. Its HOPEX platform is available on-premises or via public or private cloud. MEGA International's customers and operations are geographically spread, with most resources in EMEA, and customers in finance, government, defense, energy and utilities, and healthcare. Its future plans include adding additional list views and refined sketching, querying and reporting via an ML assistant, automatic discovery of application and technology linkages, and AI-based importing from third-party diagramming tools.

Strengths

- **Business, IT, data and risk in a single repository:** HOPEX supports collaboration across IT portfolio management, risk management, data governance, business process analysis and solution architecture. This benefits large organizations with complexity and regulatory constraints. Less mature enterprises can leverage its straightforward licensing structure, with modules bundled together as value packs, along with content and accelerators for specific industries.
- **Overhauled user experience:** HOPEX's UX/UI has been revamped and modernized, which has streamlined key elements of navigation. The introduction and refinement of several automation capabilities, such as cloud deployments, patching and dev environments, contribute to a smoother overall user experience.
- **Robust integration options:** In addition to its GraphQL endpoints, HOPEX has a multitude of out-of-the-box integrations with vendors in adjacent markets such as ServiceNow (for CMDB), CAST (portfolio insights) and Beamy (SaaS monitoring). This enables fast, flexible and customized data selection, ingestion and processing from a variety of sources, while maintaining the structural integrity of the enterprise metamodel.

Cautions

- **Reliance on consultancy support:** Although MEGA International continues to improve its UI/UX, HOPEX features and functionalities are not self-explanatory and can be daunting for new users. Even with an accessible and extensible metamodel, new customers may require consultancy support to get started.
- **Slowing growth:** While profitable, MEGA international's growth has slowed in the last few years with newer, nimbler, cloud-native vendors growing aggressively in the market. While MEGA has implemented a new UI, it remains to be seen if its rearchitected SaaS-based offering and subscription-only focus can help it maintain its leadership position in the market by providing the needed flexibility and adaptability.
- **Overwhelming onboarding experience:** Although the "connected EA platform" approach is attractive for customers, the long learning curve for new users can be overwhelming. While users can utilize some self-service support options, including e-learning modules and an AI Assistant, additional assistance must be found via the MEGA Community forum, online documentation and additional professional services.

North Highland (UMT360)

North Highland (UMT360) is a Niche Player in this Magic Quadrant. Its product, NH360 Strategic Portfolio Manager, is delivered as a SaaS offering and is composed of two modules: NH360 Portfolio Insights and NH360 Enterprise Connect. Its main operations are in North America, with some presence in EMEA. It primarily supports clients across energy, life sciences, manufacturing and financial services. The roadmap includes migrating to container-based architecture, a UX refresh, support for out-of-the-box integrations, enhanced modeling and collaboration, and ML-based insights to identify repository gaps.

UMT360 was acquired by North Highland, a change and transformation consultancy firm, in June 2023. The acquisition was formalized after closure of this Magic Quadrant's evaluation process and is not included in this analysis.

Strengths

- **Acquisition of FIOS Insight:** With the acquisition of FIOS Insight in December 2021, North Highland incorporated its Insight-EA module and rebranded it to NH360 Enterprise Connect. It offers a variety of business and EA features, including support for EA deliverables such as business capabilities models and value stream maps. This positions North Highland as a vendor with capabilities to support both strategic portfolio management and EA customers.
- **Stand-alone solutions for quick value realization:** North Highland provides stand-alone product solutions called Accelerators to support specific use cases such as business capability modeling, application rationalization and resource planning. Clients can start with a specific Accelerator offering and then enable additional capabilities in a phased manner.
- **Focus on federated EA:** The vendor understands the shift toward a federated, more business-centric approach to EA and regularly engages with customers, the Open Group and the Business Architecture Guild to inform its product roadmap. It provides business and executive

leaders with visibility into strategic roadmaps that have direct alignment with roadmaps at the project level and with EA services, to identify any change implications or assess business benefits.

Cautions

- **Slow growth in EA tool market:** The vendor is established in the strategic portfolio management tool market, where its platform integrates EA and strategy execution management capabilities. However, it has a very small presence in the EA tool market and is still in the early stages of establishing itself. With slow growth relative to its competitors, it has yet to establish itself as a threat to the leading vendors in this market.
- **Limited operations and presence:** Operations for NH360 is focused in North America and has some presence in EMEA. Its offered hosting locations are only in the U.S., Canada and Germany. In regions where there are no direct employees, it depends on partners to market and sell in other regions.
- **Lacking user experience:** Although the vendor has integrated its legacy product with Insight-EA from FIOS Insight, the user experience still consists of two significantly different interfaces that do not appear seamless. Moreover, NH360 Strategic Portfolio Manager does not have any intuitive context-sensitive help or collaboration features, such as publishing of models via Microsoft Teams and Slack-like environments and allowing real-time collaboration and comments on models.

Orbus Software

Orbus Software is a Leader in this Magic Quadrant. Its primary EA offering is OrbusInfinity (previously named iServer365), available on Microsoft Azure. OrbusInfinity is the cloud-native alternative to its iServer offering, reflecting the investment in a more business-centric EA approach by the vendor. Orbus Software operations cover EMEA, North America and the Asia/Pacific region, with a high concentration of clients in finance, government, healthcare and manufacturing. In addition to existing integrations, the roadmap includes an integration platform with over 100 connector templates, FedRAMP for U.S. public-sector compliance and a Microsoft Power Automate connector for self-service automation.

Strengths

- **Combines Microsoft specialism with turnkey solutions:** OrbusInfinity natively integrates Microsoft Teams, SharePoint, Power BI and Power Automate features. Orbus Software has the Solutions Hub, with more than 180 self-service (or guided) solutions to automate a broad range of business and IT-focused use cases, such as data collection and synchronization and end-of-life notifications, to help clients accelerate time to value.
- **Variable product, pricing and marketing approach:** The vendor's pricing strategy includes an entry-level package that allows clients to scale and mature product usage. The introduction of weighted users (authors and contributors) and viewers allows clients to flex user tool access. Regional licensing models combined with product solutions provide options for different business and IT use cases.

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

Cautions

- **Microsoft 365 dependencies:** For OrbusInfinity, a Microsoft-centric approach is applied for the platform and embedded collaboration, visualization and automation capabilities. To benefit from the embedded Microsoft features, clients need to bring their own Microsoft 365 Business licenses. Although the product provides a proprietary UI/UX, tight integration with Microsoft 365 can constrain OrbusInfinity to a SharePoint look and feel and, ultimately, UX. This can potentially limit Orbus Software's ability to take the UX architecture to the next level.
- **Continuing growth with cloud requires successful migration of existing iServer clients:** The vendor indicates good market traction for OrbusInfinity, with just 30% of legacy iServer customers still requiring migration. However, this conversion is lower than previous projections. Despite aggressive growth of OrbusInfinity, considering its still limited client base, the vendor must continue to invest in iServer services and support, while expanding the functionality of OrbusInfinity in an increasingly competitive EA tool market.
- **Product deployment and outcomes:** Two-thirds of clients are able to configure OrbusInfinity without the need for professional services, with the remaining one-third requiring at-cost support for more complex configuration. Although most clients will achieve product configuration within Orbus Software's benchmark, it is important to jointly define what outcomes (business and IT) are expected from using OrbusInfinity beyond just EA tool deployment metrics.

QualiWare

QualiWare is a Leader in this Magic Quadrant. QualiWare X is delivered as a SaaS solution, on-premises or on a private cloud. With operations focused in Europe and North America, the vendor has customers across government, energy, finance, manufacturing and the technology provider market. Its future plans include improvements to server architecture to improve performance in support of collaboration, expansion of its OpenAPI, and extending its use of AI to support creation, validation and sharing of models.

Strengths

- **Focus on ecosystem collaboration:** QualiWare was quick to provide collaboration support for key external stakeholders. With support for customer journey mapping and business ecosystems, the product supports enterprise architects making an outside-in assessment of business operations and processes.
- **Support for industry verticals and ESG:** With its focus on large complex organizations in regulated industries, QualiWare has invested in distinct assets covering relevant government EA

frameworks such as GWEA and EIRA; support for SCOR and Industry 4.0 for manufacturing; APQC for utilities, aerospace and defense; and Laboratory Asset Management for life sciences. QualiWare has also integrated out-of-the-box assets in support of the UN Global Compact and Sustainable Development Goals.

- **Innovative features:** While there may be more full-featured EA tools, Qualiware X leads the way in delivering features not offered by other vendors in this market, including early investment AI functionality that predated the recent generative AI boom, a text-to-model feature that creates a model from a text description, new support for the EDGY enterprise design framework, and unique 2D and 3D visualizations.

Cautions

- **Slow growth:** Over the last few years, the pace of QualiWare's growth has considerably slowed compared to other cloud-native and rearchitected tools in the market. To renew focus on its core product offering, the vendor divested a major part of its consulting business in 2021. While QualiWare has seen a rebound in revenue since the divestiture, it remains to be seen if this will have a significant impact on its growth.
- **Limited geographic presence:** While leveraging a partner network to support global growth, the majority of the vendor's resources reside in and focus on EMEA and North America. Organizations outside of these regions considering QualiWare must assess local partner support and related SLAs.
- **Rich, but challenging, user experience:** QualiWare X is a functionally rich product and has made progress on the Completeness of Vision axis this year. However, the product would benefit from additional UI updates in support of a more intuitive experience for new customers.

Software AG

Software AG is a Leader in this Magic Quadrant. Software AG's Alfabet is available as a SaaS offering, on-premises and as a hybrid solution. Its operations are geographically diversified, and its clients span all industries. Its future plans include advanced access controls, customer-configured workbench reporting and further upgraded diagramming features.

Strengths

- **Simplified volume discounts:** Software AG has implemented a "T-shirt" volume pricing model, which optimizes the price of users and functional modules depending on the size of the organization. This allows for greater flexibility and customization during the use and/or adoption of Alfabet services.
- **Lower-cost SaaS entry option:** Alfabet FastLane is a preconfigured SaaS version of Alfabet Enterprise, built on the same codebase. It offers a reduced set of functionalities to support common EA-related roles and use cases, with a range of dashboards and visualizations. The low barrier to entry of Alfabet FastLane makes it easier for customers to get started and then transition to Alfabet Enterprise as their needs grow.

- **Large federated-organization support and vertical industry benefits:** Software AG offers a varied product portfolio and has a significant global footprint to engage and build partner ecosystems to support its sales and business operations. It has industry-specific teams and has embedded a range of features, industry-specific frameworks and reference models in Alfabet to support large distributed and federated organizations.

Cautions

- **Reliance on professional services:** A notable amount of Alfabet Enterprise customers opt for additional professional services, beyond the standard services, training and scoping. While not atypical in the EA tool space, it is an indicator that customers may require more help than what is included by Software AG during the initial implementation of its tool.
- **Unclear culture of innovation:** While Software AG's feature offerings are varied and robust, its R&D spend is significantly lower than industry peers. New feature speed to market will remain a challenge compared to both similarly sized and smaller competitors that dedicate more resources to innovation efforts.
- **Stagnant customer growth:** While Software AG has a significant market share, its customer volume has remained stagnant compared to industry peers over the last few years. Competing for customers with newer, nimbler, cloud-native products continues to be a challenge and the vendor's ability to attract new customers remains unclear.

UNICOM Systems

UNICOM Systems is a Niche Player in this Magic Quadrant. Its UNICOM System Architect suite is offered on-premises, on private cloud or stand-alone. Primarily sold in North America and Europe, the product is strongest in the government (both military and civilian) and banking sectors. Future plans for UNICOM System Architect include integrations with portfolio management, solution design, requirements and change management, and tooling.

Strengths

- **Follow-the-sun support capabilities:** UNICOM Systems provides 24/7 support for users across the globe. This support is able to handle complex requests for service, with product management and development experts stepping in to resolve beyond that. With a global presence, the vendor is well-positioned to support customers through installation and with their day-to-day needs.
- **Simple pricing model:** UNICOM Systems has created a straightforward pricing model where customers can choose between node-locked licenses (each workstation must have a license) or floating licenses (licenses can be shared across the local network). Maintenance is simply 20% of the license costs. The vendor has unbundled the core product from the web client and other optional features.
- **Dedicated industry and geography focus:** UNICOM Systems has developed specific capabilities to align with the U.S. federal government's and defense market's needs. It supports FEAF and DoDAF, along with numerous other industry frameworks; has developed a specialized sales

team to engage with government clients; and continuously ensures its product's interoperability with federal security and risk regulations.

Cautions

- **Legacy UI with long learning cycle:** UNICOM System Architect is still based on a legacy UI that relies on extensive, nonintuitive drop-down and menu selections for navigation. While the SA XT web client offers a more modern interface to some of the tool's functionality, core users will still rely heavily on the desktop tool interface, which can slow adoption of the tool. This is further impacted by a reliance on its support teams to handle customer onboarding and day-to-day needs, instead of allocating customer success managers as primary support.
- **Product technology requires overhaul:** UNICOM System Architect has been in this market for more than 30 years and the vendor continues to invest in the product. However, without significant reinvention of the foundations to securely deliver and support a cloud-native SaaS offering, UNICOM System Architect will get left behind by nimbler and cloud-native competitors.
- **Limited growth opportunity:** Due to the vendor's focus on the federal sector and its lack of a SaaS product, potential growth of the product in both the near term and long term is challenged. This is exhibited via its slow acquisition of new clients and addition of new users, and points to a needed business model change to accelerate demand.

ValueBlue

ValueBlue is a Challenger in this Magic Quadrant. Its BlueDolphin product is offered exclusively as a SaaS-based solution on Microsoft Azure. With operations focused in Europe, ValueBlue's targeted industries are the finance, retail, government, education and healthcare sectors. Future plans for BlueDolphin include AI-powered metadata enrichment, design thinking collaborative design (EDGY) and continued iconography enhancements.

Strengths

- **Plentiful features for non-EA users:** BlueDolphin has a bevy of features that provide value to those outside of EA, related to compliance, skills, risk, project dependencies and value chains. There is an intentional emphasis on supporting strategic planning, impacts and business transformation. Providing these features increases the engagement and collaboration opportunities throughout customer organizations.
- **Significant customer and activity growth:** ValueBlue has added a significant amount of users compared to its overall size, while retaining a very high portion of customers and employees. User activity has also increased significantly, which implies that BlueDolphin's varied set of personas and features is resonating with more individuals within customer organizations.
- **Intuitive onboarding and implementation:** BlueDolphin has a brief learning curve and a reasonably accessible UI. The vendor offers an in-platform knowledge base and interactive onboarding tour, and also features in-app chat support with immediate response. Additionally, with a structured customer success program, it aims to improve the customer experience of

BlueDolphin. ValueBlue also offers a very quick configuration of its metamodel compared to its industry peers.

Cautions

- **Limited geographic presence:** Most of ValueBlue's staff is in the Netherlands while a significant number of its clients are in Europe. Although the vendor has opened offices and continues to expand its workforce outside of its home market, that effort is still ongoing. As it continues to grow, ValueBlue must develop a more sophisticated geographic strategy and related local resources to maintain its customer experience and support.
- **Appears less focused on high-complexity customers:** ValueBlue's product supports a broad set of user personas, with a simplified step-by-step model for clients to follow. This initial benefit for low-maturity clients or low-complexity efforts may diminish as user's expectations and needs evolve beyond the tool's streamlined functionality and UX. This may reduce its appeal to higher-maturity customers that require a complex set of features.
- **Balancing quality and growth:** While ValueBlue has enjoyed rapid and significant growth, prospective and existing customers need to ensure that the vendor continues to successfully maintain quality in its products and services as it continues to expand.

Inclusion and Exclusion Criteria

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

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

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

Performance: In 2022, the vendor had to have either realized:

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

Market Momentum: To qualify for inclusion, the vendor had to have demonstrated market momentum in 2022 for the primary EA product through a minimum of:

- At least five new customer wins (net new logos), headquartered in each of a minimum of two of the four major geographic regions (major global regions are defined as EMEA, the Asia/Pacific region, North America and Latin America) with its primary EA product in production for a total of 10 new customers in two regions in 12 months

EA Tool Market Focus: To qualify for inclusion, the vendor had to have in 2022:

- An installed base of at least 50 customers (unique logos) that used its primary EA product in production *and*
- General availability as of 30 April 2023 for its primary EA product *and*
- Its primary EA product demonstrably supporting all use cases and including/embedding all capabilities, as described in the Market Definition/Description section

Evaluation Criteria

Ability to Execute

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

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

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

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

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

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

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

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

Table 1: Ability to Execute Evaluation Criteria

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

Source: Gartner (November 2023)

Completeness of Vision

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

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

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

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

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

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

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

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

Table 2: Completeness of Vision Evaluation Criteria

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

Source: Gartner (November 2023)

Quadrant Descriptions

Leaders

Leaders have a deep understanding of the realities of the market, a reliable global delivery record and an ability to influence the market's direction, along with an ability to attract and keep a growing customer base. In the EA tool market, leadership implies understanding, facilitating and supporting the strategic role that enterprise architects play at a much broader level. They are more business-strategy-focused, with a shared operating model at the business level that helps drive the relationship with IT. Leaders must not only demonstrate a market-leading vision, but also the Ability to Execute on that vision. At this point in development of the EA tool market, 10 vendors have sustained excellence in both execution and vision long enough to demonstrate effective leadership. Customers should note that a Leader is not always the best choice. A focused, smaller vendor also can provide excellent support and commitment to suit individual needs. Other vendors may provide a certain capability – such as a focus on your industry, a better cost-

performance ratio, or a commitment to specific features or functions – that is important to your organization. This more focused type of vendor would not appear as a Leader in the overall EA tool market but, within a specific market segment, it may well be treated as one.

Challengers

Challengers excel in their ability to attract a large user following, but this ability is limited to a subset or segment of the market. For that target audience, Challengers are effectively Leaders, but that specificity presents a barrier to adoption for those outside that subsegment. For example, in the EA tool market, a Challenger may have a strong, proven presence or following, but lack sophistication in the evolving use cases for EA tools. Alternatively, a Challenger might understand those use cases well and achieve a strong following in its home market, but still struggle to deliver the same levels of success on a global scale. One vendor rated as a Challenger in the EA tool market this year. Although Challengers are typically of significant size with significant financial resources, they may lack elements of the vision we expect, innovative ideas and plans, or an overall understanding of market needs. In some cases, Challengers may offer products that dominate a large, but shrinking, segment of the market. Challengers can become Leaders if their vision develops. Large companies may move between the Challengers and Leaders quadrants as their product cycles and market needs shift.

Visionaries

Visionaries in a market are the innovators driving the market forward by responding to emerging, leading-edge customer demands and offering new opportunities to excel. Typically, these vendors appeal to leading-edge customers and may even have minimal mainstream presence or name recognition. Their ability to deliver sustained and dependable execution in the mainstream enterprise market is not sufficiently tested. Visionaries enable model-driven enterprises, focusing deeply on the business and its strategy rather than on the traditional fixation of EA on the scope of IT. Within the EA tool market, there is only one Visionary vendor in this year's Magic Quadrant. This vendor is highly disruptive to the established players with its open-source offering for unlimited users and low-cost support service subscription. Visionaries can eventually grow to become Leaders. Alternatively, they may decide to limit their target markets to focus on their core competencies, core technologies or existing customers, and become Niche Players. They could also develop their specialties to advance in execution and become Challengers.

Niche Players

Niche Players choose to operate in a subsegment of a market, or they have a limited ability to innovate or outperform other vendors in the wider market. This limitation may result from a focus on a particular area of functionality, vertical industry or region, or because they are new entrants. Alternatively, Niche Players may struggle to remain relevant in a market that is moving away from them. Niche Players may have reasonably broad functionality, but limited implementation and support capabilities and relatively limited customer bases. The EA tool market has three Niche Players. Some of these vendors have transitioned from other markets and need to focus fully on EA in order to progress. A couple remain stagnant in their vision and have limited Ability to Execute. Others lack the modern architecture of many of the vendors in the Challengers, Leaders

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

Context

This Magic Quadrant focuses on EA tool vendors' placement in the market, not specifically on the capabilities of their products (for a more detailed evaluation of the products, see [Critical Capabilities for Enterprise Architecture Tools](#)). Only two of the 15 evaluation criteria in this Magic Quadrant relate to product or service functions. The other 13 evaluation criteria focus on the vendors' ability to meet the requirements of this market (for details, see the Inclusion and Exclusion Criteria and Evaluation Criteria sections). In response to changing client needs, Gartner adjusts the weight of different evaluation criteria in order to accurately reflect the state of the market. This year's Magic Quadrant analysis has shifted to a balanced focus on growth and market share, which enables a more informed view of how the current market is evolving and its future direction.

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

- **Enterprise transformation management.** EA practitioners must be able to produce and manage models that can help the enterprise understand how it needs to transform to changing strategy, objectives and outcomes in the most optimal and resilient way.
- **IT portfolio management.** EA practitioners must be able to use enterprise transformation models and other data to help build, analyze, manage and assess IT portfolios and related risks, opportunities and recommendations in preparation for execution.
- **Advanced roadmapping.** EA practitioners need to be able to build, present and communicate roadmaps that describe enterprisewide transformation and investment decisions for a broad range of enterprise viewpoints, where these viewpoints correspond to changes in the market, regulations, enterprise (business and IT) strategy, objectives, outcomes and architecture.
- **Solution architecture design and delivery.** EA practitioners need to be able to efficiently design and communicate strategic, tactical and emergent solution architecture that is aligned to enterprise standards. At the same time, these designs must be able to be easily consumed and implemented by teams to deliver products and services at pace and at scale.
- **Innovation and sustainability.** EA practitioners must be able to help organizations track and leverage emerging trends and technologies through structured, flexible and iterative methods. This includes identifying and tracking improvements in sustainability.

Market Overview

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

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

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

There are three merger and acquisition (M&A) activities worth noting in this market for 2023:

- In June 2023, UMT360 was acquired by business transformation consultancy North Highland.
- In September 2023, SAP announced its intent to purchase LeanIX. LeanIX has long had a partnership with SAP, integrating SAP Signavio to support advanced support for business process management and providing IP that specifically supports the SAP platform.
- Also in September 2023, Bizzdesign announced the acquisition of Edifit, a systems integrator for Bizzdesign’s Horizon product. Along with the system integration talent, the acquisition brings IP developed by Edifit that will now be available to all customers.

Acronym Key and Glossary Terms

CMDB	A configuration management database is a repository that is designed to store many of the components of an information system. A key goal of a CMDB is to help an organization understand the relationships between different components and track their configuration.
Metamodel	A metamodel or surrogate model is a model of a model, and metamodeling is the process of generating such metamodels. Metamodels catalog each type of component in an EA, provide detailed definitions, document the relationships between one component and another, define the structure and configuration of the architecture itself, and help users understand the structure and behavior of the architecture.
ML	Machine learning

SOC 2	System and Organization Control (SOC) 2 is an auditing procedure that ensures your service providers securely manage your data to protect the interests of your organization and the privacy of its clients.
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Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Compréhension du marché : capacité du vendeur à comprendre les désirs et les besoins des acheteurs et à les traduire en produits et services. Les fournisseurs qui font preuve du plus haut

degré de vision écoutent et comprennent les désirs et les besoins des acheteurs, et peuvent les façonner ou les améliorer grâce à leur vision supplémentaire.

Stratégie marketing : un ensemble de messages clairs et différenciés, communiqués de manière cohérente dans toute l'organisation et externalisés via le site Web, la publicité, les programmes clients et les déclarations de positionnement.

Stratégie de vente : stratégie de vente de produits qui utilise le réseau approprié de filiales de vente directe et indirecte, de marketing, de service et de communication qui étendent la portée et la profondeur de la portée du marché, des compétences, de l'expertise, des technologies, des services et de la clientèle.

Stratégie d'offre (produit) : approche du fournisseur en matière de développement et de livraison de produits qui met l'accent sur la différenciation, les fonctionnalités, la méthodologie et les ensembles de fonctionnalités en fonction des exigences actuelles et futures.

Modèle commercial : la solidité et la logique de la proposition commerciale sous-jacente du fournisseur.

Stratégie verticale/industrielle : stratégie du fournisseur visant à orienter les ressources, les compétences et les offres pour répondre aux besoins spécifiques de segments de marché individuels, y compris les marchés verticaux.

Innovation : Agencements directs, connexes, complémentaires et synergiques de ressources, d'expertise ou de capital à des fins d'investissement, de consolidation, défensives ou préventives.

Stratégie géographique : stratégie du fournisseur visant à orienter les ressources, les compétences et les offres pour répondre aux besoins spécifiques des zones géographiques en dehors du « domicile » ou de la zone géographique d'origine, soit directement, soit par l'intermédiaire de partenaires, de canaux et de filiales, en fonction de cette zone géographique et de ce marché.

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