



**2022**

# **LOW-CODE NO-CODE** Innovation in the Fast Lane

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# FOREWORD

After decades of enabling and improving business operations, technology is shaping new dimensions in the digital world to drive growth. As IT industry is conceptualizing and delivering digital strategies, Low-Code No-Code is emerging as a strong dominance in the IT industry. Businesses are increasing their adoption of these applications to improve their competitive edge and continue the process of integrating digital technologies. The impact of LCNC demonstrates that organizations no longer need to depend on a web or app developer to build a website, app, or user interface. LCNC platforms eliminate technical barrier as these applications are emerging as a solution while lowering risks and costs.

Through visual development and automation, LCNC platforms are providing tools that are crucial and flexible to explore. It helps to innovate and integrate advanced emerging technologies into the existing system. In a way, it is making it easier to build and scale customized applications. LCNC software application is expected to be a disruptive force in the technology world, powered by emerging technologies like AI, ML, and data analytics. This application development approach will be key to digitally transforming many enterprises. Visual coding tools are all set to extend a broad range of skill levels to engage directly in the development and create a path to collaborate with stakeholders to design and configure solutions that more closely match the needs of the businesses.

To explore the LCNC market drivers and challenges, the emerging job market of India, and to understand how enterprises can leverage in adopting and benefiting from Low Code and No-Code tools and experiences, we initiated the report to share how businesses are rethinking, reinventing and transforming their businesses with groundbreaking innovation of LCNC. We also emerged with essential insights from our survey to sense the pulse of stakeholders about LCNC. With this, we urge you to explore the world of LCNC, an application method which has set afoot to enable faster growth of businesses.



LCNC will be a game changer in the coming years as it will require minimal programming skills to build complex projects. It further leads to better utilization of non programmer community.

**Sunil C**

Chief Executive Officer  
TeamLease Digital

# EXECUTIVE SUMMARY

In the wake of Covid-19 shutdowns, IT groups pivoted nearly overnight, launching technology-driven initiatives to enable smooth workforce models. More companies are now investing millions into digital transformation for their business resilience. The moment was not just an exercise in fast-tracking tech deployments but it was also a testing time for companies' ability to get employees to embrace new forms of business engagement. Especially after the pandemic, Low-Code No-Code (LCNC) platforms gained momentum to cut down extensive development cycles to create new applications that meet immediate business needs. Revolutions can go two ways - IT companies can usher in a better new world or they can descend into anarchic chaos. To promote the former and guard against the latter, the IT function should take on a new role as it governs the roll-out of LCNC platforms—a role that would require a new operating blueprint.

LCNC technology is the new paradigm in app development that eliminates the need for coding. This report highlights the current state and the future potential of LCNC in the country. It presents popular existing LCNC platforms and emerging concepts that enable the capability of automating business, extending seamless customer experience, and better workflow integration. The report presents the need for LCNC to achieve digital transformation objectives. Additionally, it also touches upon the evolution of LCNC from traditional coding mechanisms, key players, impact on the IT industry, potential use cases and the job market in the country for freshers and experienced individuals with the salary ranges. The report has also summed up drivers and strategies to address the challenges of LCNC.



LCNC will be a unique and disruptive technology in the near future as it is easy to adapt and requires minimal logical & programming skills. Most LCNC projects can be designed as plug and play which would amplify its popularity.

**Siva Prasad Nanduri**

Chief Business Officer  
TeamLease Digital

# OVERVIEW

For a few decades, IT organizations heavily depended on their own developers or on an external vendor to develop applications or websites. Typically, organizations had to invest in terms of cost and wait for a longer period of time. Today, however, another platform is becoming increasingly popular: Low-Code No-Code (LCNC). It is expected that by 2030, the global LCNC development platform market is all set to produce \$187 billion in revenue and account for more than 65% of application development activity. Gone are the days when going digital was a matter of choice. All the businesses have been catapulted into digital transformation and have increased the demand for automation to serve the clientele. Increasing demand for software development to perform the IT operations is the driving force of the growth of LCNC.

**\$187 Bn**

Global revenue  
expected by 2030

More than  
**65%**  
of application  
development activity

## WHAT IS LOW-CODE NO-CODE (LCNC)?

- Set of tools that developers, on-technical professionals, or citizen developers can use to build applications in a drag and drop interface
- Includes complete user interface, integrations, data management & logic
- Ready to develop blocks of code which enables Minimal Hand Coding
- Facilitate fast production and usage of functional software

## HOW IS LCNC DIFFERENT FROM TRADITIONAL APPLICATION DEVELOPMENT?

- Offers easy to use interface with ready to use components which contain the actual code for different capabilities without extensive coding
- Developers directly link together these pre-built components
- Increments business feasibility and cost-effectiveness without dependency on talent & traditional IT services

# THE LCNC TECHNOLOGY LANDSCAPE



## PaaS

**Platform as a Service** – Users pay for a platform to build their own tools



## hpaPaaS

**High Productivity Application Platform as a Service** – helps developers rapidly build web apps without writing custom codes



## aPaaS

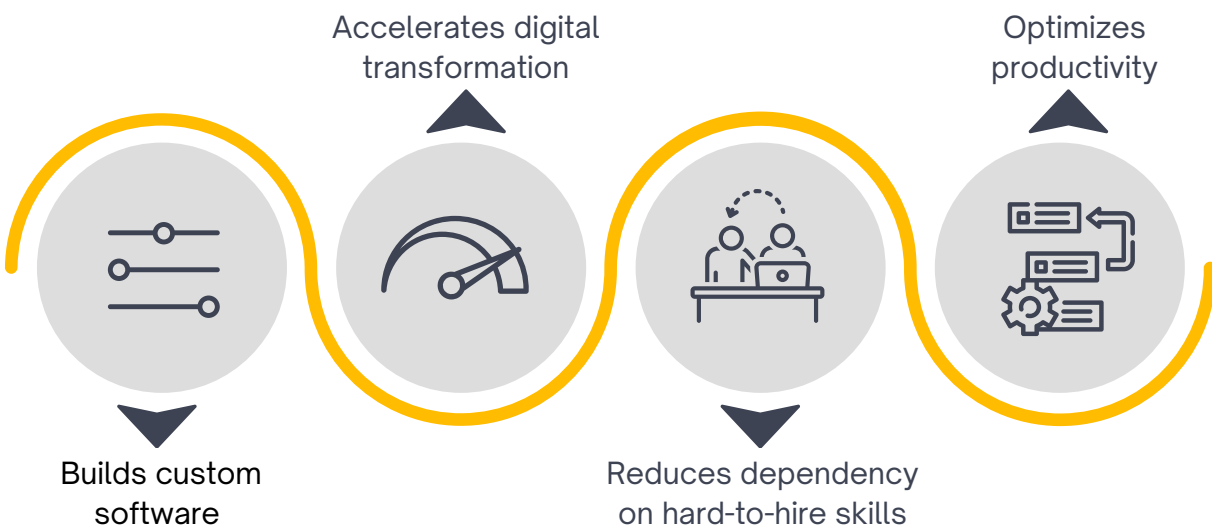
**Application Platform as a Service** – A specific kind of platform where users can build their own applications



## DaaS

**Deployment as a Service** provided by IT Industry from consulting in selection of right LCNC provider to execution

## HOW CAN LCNC SOLVE ORGANIZATIONAL PROBLEMS?



# TOP LCNC DEVELOPMENT PLATFORMS



App Maker



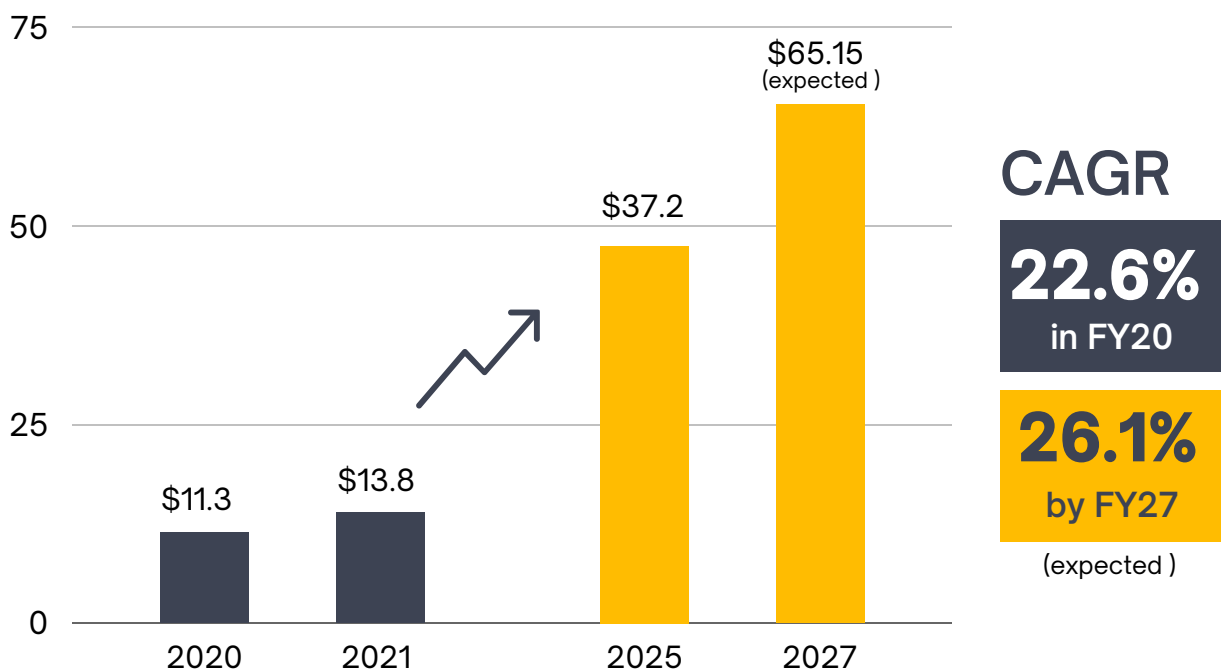


## GLOBAL MARKET SHARE

Many research companies have estimated the size of the LCNC market and its projected growth. It must be noted that the LC market is more mature and larger than NC. The global market size data combines figures for LCNC platforms together and often refers to LC explicitly.

- Global Low Code platform market revenue is forecasted to reach approximately 65bn US dollars in 2027 and market is projected to grow with a CAGR of 26.1% over this period
- By 2030, LCNC market is expected to account for more than 65% of application development
- BFSI, Healthcare, SMBs, Fintech Firms, Start-ups, and Hi-tech sector are the leading consumers for LCNC usage
- LCNC is projected to be adopted by 75% of businesses across varied industries for driving business efficiencies

Global Low Code Market Size (Bn)



Sources: Gartner and Markets & Markets

Note: Other LCD technologies include RMAD tools and RAD tools

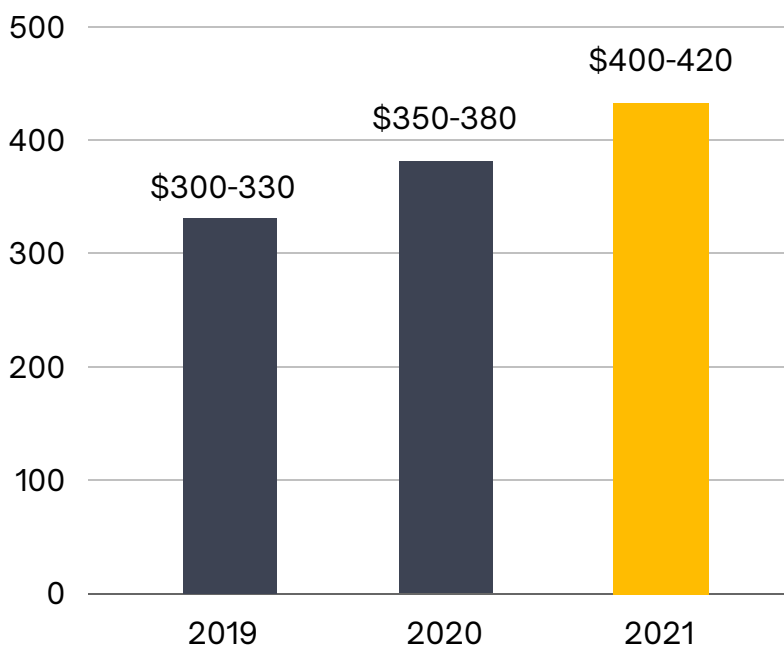




# INDIAN LCNC MARKET LANDSCAPE

According to NASSCOM study, LCNC market generated about \$400 million in FY21 growing at a compounded annual rate of 15% since 2019 - 2021. Almost 70% of India's LCNC revenue currently are from global markets. India has potential to generate \$4.0-\$4.2 bn revenue from the LCNC market by 2025 that will account for 10% of the global market.

## Indian Low Code Market Size (Mn)



## CAGR

**15%**

FY19 - FY21

India has potential to generate

**\$4-4.2 Bn**

revenue from LCNC market by 2025

Source: NASSCOM Low Code No Code report

**~7X**

Reduction in  
Development &  
Deployment time

**~3X**

Reduction in  
Development  
Costs

**~1.5X**

Increased  
Productivity

**~30%**

Increase in ROI

India currently has 150 LCNC players, vast majority of which are bootstrapped startups. As much as 80% of LCNC PoCs (Proof of Concepts) were parlayed to full-scale implementations. Hubbler, Appy Pie, and ToolJet are the leading platforms in this space.

# MAJOR FACTORS DRIVING GROWTH

## Increasing Digital Businesses



The rapid increase in need for digitization and strong ecosystem is influencing growth of the market. Currently, IT business is under tremendous pressure to accelerate application delivery speed and time. The increasing need for custom software solutions in support of digital transformation has prompted the emergence of citizen developers outside of IT.

## Aggressive Partnerships and Collaborations



Rigorous product launches and continued partnerships are accelerating digital business transformation for joint customers. Additionally, the acquisitions and merging of companies is strengthening its business in the LC landscape.

## Skill Sets



Traditional development requires a dedicated team of software developers with strong programming skills. However, LCNC platforms require minimal programming skills. Any user can develop customized apps.

## Scalability and Access



Most users have deployed low-code development platforms over the cloud as this mode offers increased scalability, 24/7 data access, and reduced IT expenditure.



# FUTURE OF JOB SEEKERS WITH LCNC

LCNC is the future of software development. In the coming years, companies will rely mostly on these platforms as it shortens go-to-market time significantly. The rising popularity of these platforms has opened new avenues for budding and amateur developers to build apps very easily.

LCNC tools are also gaining attention in the context of the Great Resignation, with businesses noting that these platforms make it easy for companies to address the shortage in the sector. Businesses require more enterprise technologies than ever before, IT skill shortage will continue to be an issue moving forward. However, LCNC enables companies to expand and accelerate app delivery by empowering citizen developers.

Whether you're seasoned, experienced or even an enthusiast looking to pick up programming skills — LCNC programming provides a tantalizing opportunity. As for those who are already in the field, the world of programming seems to diversify in two ways — greater simplification (shift from low- to no-code development) and broader scope of services, moving from spot low-code solutions to integrated enterprise-wide functionality.



# SKILLS REQUIRED FOR LCNC DEVELOPER

Tools for non-programmers are speeding up the developmental activities in the LCNC market. These tools are being driven by a shortage of talent, growth of hybrid work and demand for accelerated digital initiatives. With LCNC platforms anyone can build applications without software expertise, significantly faster and at a fraction of the cost.

To successfully become a LCNC developer, 2-4 years of experience in software development or a basic knowledge of web/cloud-based applications along with a bachelor's or masters' degree in Computer Science or similar field is required.

According to the Mendix survey

# 70%

of the developers with no programming background learned how to build applications with a low-code platform in just one month or less.

# 28%

learned in just two weeks or less.



Job seekers with skill sets in Java/ J2EE, UI, UX, SQL, HTML, CSS, JavaScript, and Web 2.0 will have an added advantage.

For freshers, one programming language or scripting experience (C#, .Net, Java, Python) is desired as low-code platforms contain more complex tools and provide customization, they are only appropriate for individuals with programming knowledge.

Learning platforms like Low code academy, Udemy, Simplilearn, and Koenig are offering LCNC training programs.

# LCNC JOBS & SALARY RANGE IN INDIA

With emergence of digital transformation happening across industries, demand for specialized skills like LCNC has created new opportunities for budding developers. This will amplify new jobs in the Indian geography for non-traditional coders.

## Platform wise jobs available in India (as of July 2022)

Platform	Total jobs available	Active job seekers
Mendix	903	150
Appian	2,500	1,800
Salesforce Lightning	12,000	7,000
Outsystems	700	335
Zoho Creator	455	190

**15-18L** P.A  
3 to 5yrs Experience

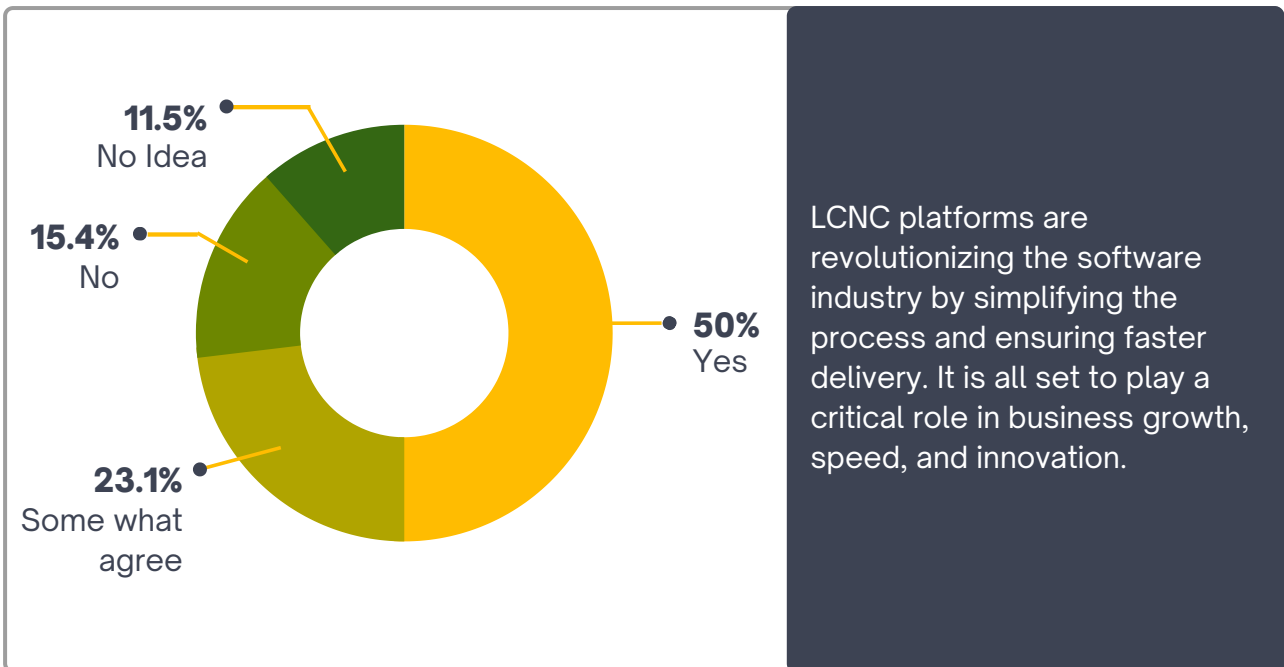
**16,558**  
Total jobs available

**9,475**  
Total active job seekers

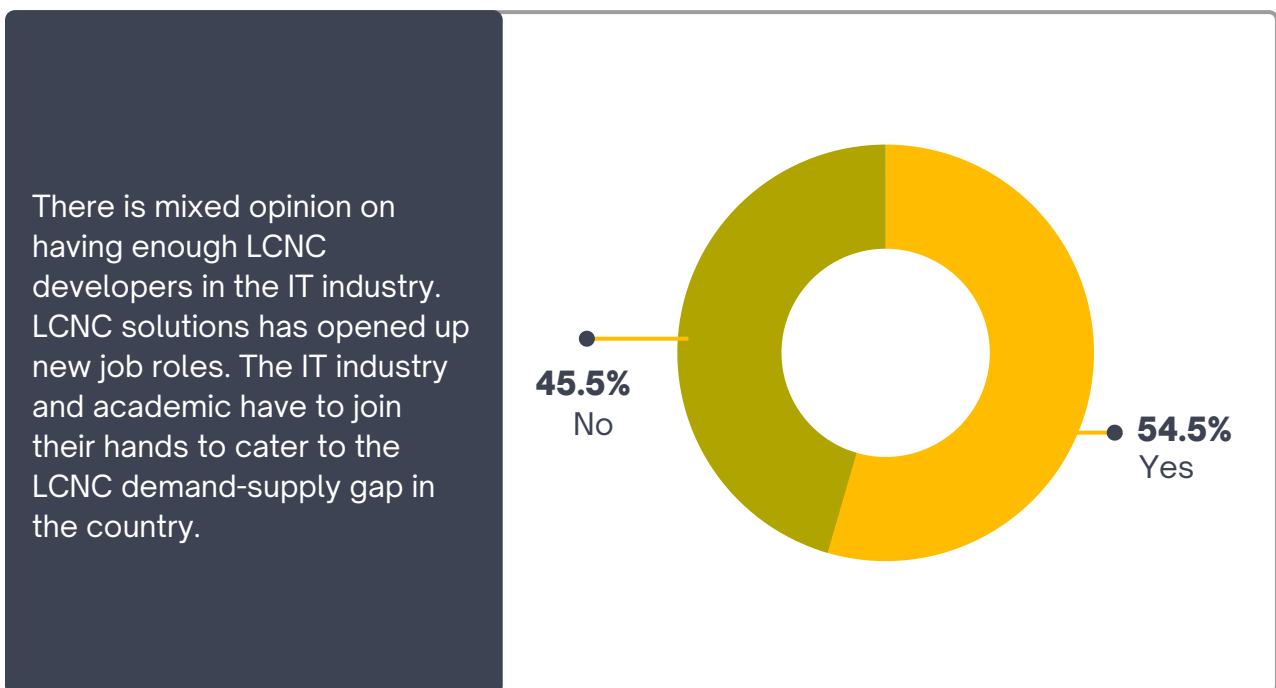


# ADDITIONAL FINDINGS

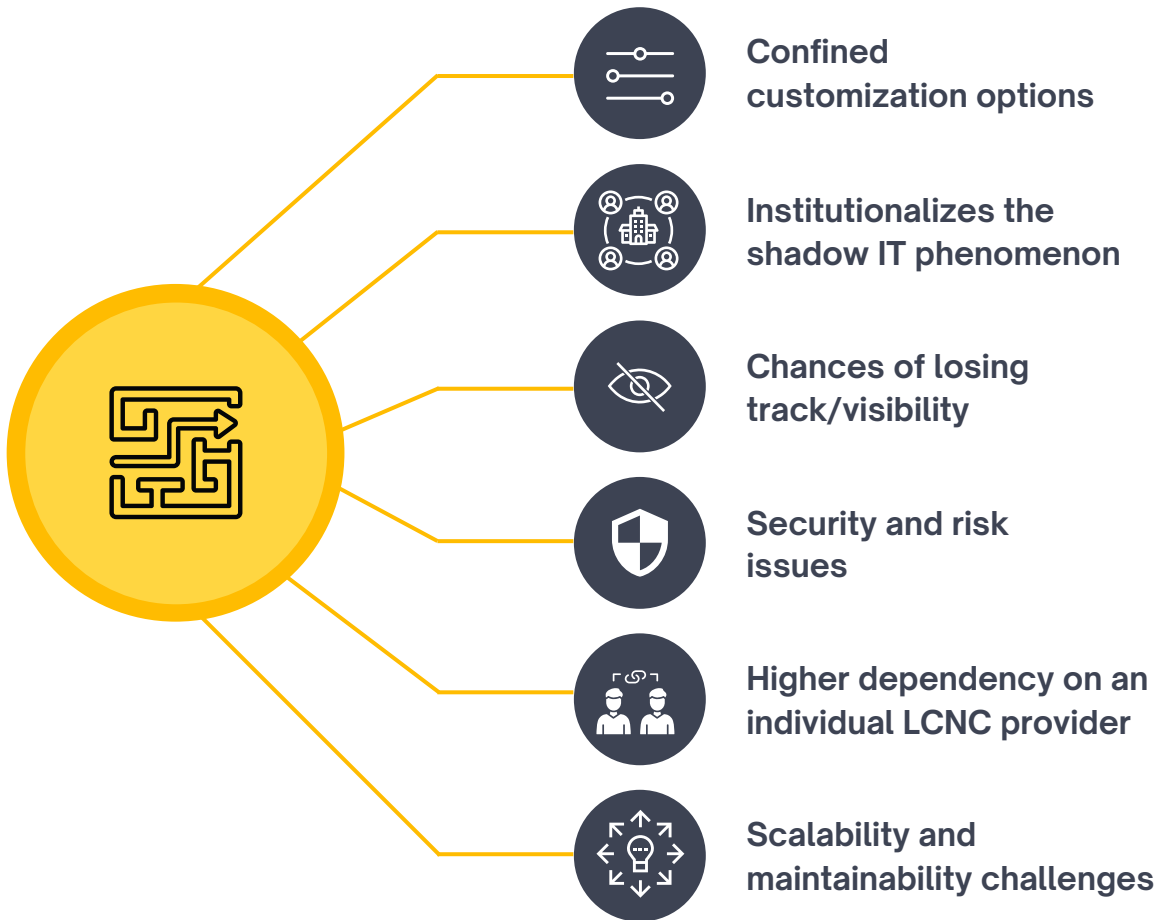
## LCNC as the future of software development



## Visibility of LCNC developers in the Indian IT industry



# LIMITATIONS WITH LCNC



## WHAT EXPERTS SAY ABOUT LCNC?



LCNC Platforms are revolutionizing the IT industry especially in the retail, healthcare, and ecommerce domain by making software development quicker and more accessible. Developers and even non-developers can create an enterprise-grade application which saves time and cost. Organizations are now better equipped to quickly adapt and respond to fast-changing business conditions.

**Krishna Reddy**, CEO, Amnet Digital



Low Code no code platforms are aiding in digital transformation across businesses by reducing development costs and improving organisations agility. It is industry agnostic and can be a game changer in the long run.

**Kalyan Kumar Ravi**, EVP – Technology, Liquid Payments, Inc



## CONCLUSION

The world of IT witnessed tremendous growth over the last few years. A great number of software companies are budding every day to meet the growing demands of businesses. LCNC platforms are extending rapid development capabilities to meet the ever-changing demand for software systems. While there may be some apprehension in some corners about implementing low-code app development platforms, it has undoubted benefits for IT groups. The most convenient, less expensive, and efficient LCNC has already started making its place in the IT world and there's no stopping to that. At the same time, LCNC platforms have unfurled bright opportunities for freshers and experienced programmers alike. It allows them to build effective and efficient apps in no time!



# ABOUT

# TEAMLEASE DIGITAL

TeamLease Digital is a subsidiary of TeamLease Services Limited, which offers Tech Staffing Solutions across IT, ITeS, IT Infrastructure, BFSI, Mobile Tech, Telecom, Engineering, EdTech, HealthTech, and Gaming Industries. TeamLease Digital has emerged as one of the largest IT Staffing & Solutions providers in the country and has hired over 80,000+ professionals since its inception with 10000+ consultants currently deployed with 200+ clients including some of the largest Fortune 500 customers, and has over 7,000+ open jobs every day. With the vision of 'Putting India to Work', we at TeamLease Digital are committed to being part of the amazing growth story.





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