Magic Quadrant for Enterprise Agile Planning Tools

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By Analysts Keith Mann, Mike West, Bill Blosen, Akis Sklavounakis, Deacon D.K Wan

Newer vendors are successfully challenging past Leaders as enterprise-scale agile methodologies enter the mainstream. This Magic Quadrant evaluates 16 vendors of enterprise agile planning tools to help you make the right choice for your organization.

Market Definition/Description

Agile is the dominant means of creating software today because it enables organizations to respond to change quickly, to learn rapidly, and to deliver continuously. Making use of agile practices at scale is essential to digital business success.

Enterprise-scale agile is a mainstream practice. Organizations that recognize the advantages of agile development have learned to coordinate the work of multiple agile teams and adapt their governance and leadership processes to support agile methodologies. Top-down, strategic adoption of agile is common, driven by digital business transformation initiatives. Top-down adoption is also being accelerated by the growing adoption of the Scaled Agile Framework (SAFe), the "Spotify model" and other frameworks.

Enterprise agile planning (EAP) tools coherently manage the diverse information and processes involved in enterprise-class agile development.

Enterprise-class agile development is a natural evolution of project-level agile to support the demands of large-scale software management. Agile processes are highly accelerated and iterative. The information needs of agile teams often differ from those of their leadership. This has led to the use of a variety of tools: some for the teams, others for management.

EAP tools address management needs by combining data from multiple teams to produce:

- **Customer value metrics**: Such as customer satisfaction/adoption and the delivery of business outcomes.

- **Velocity metrics**: Such as Scrum team velocity and Kanban team lead and cycle times.

- **Organizational effectiveness metrics**: Such as team use of agile practices and issues arising from ineffective cross-team coordination.

- **Quality metrics**: Such as test coverage and escape defect count.

> **Agile at scale introduces process change and new practices, either through the adoption of an enterprise agile framework, or through organic growth and evolution.**

These new processes and practices create a need for tools that support:

- Monthly, weekly and even daily deliverables based on business outcomes.

- Increased visibility into the flow of work.

- Requirements captured in epics, features, user stories and tasks.

- Collaborative and shift-left practices such as test-driven development and acceptance test automation.

- Management of cross-team dependencies.

- Release planning and forecasting.

Some optional product capabilities are evident among EAP tools. For some niche vendors, these become differentiators.

Among these are:

- Flexible workflows and configuration for organizations that adapt enterprise agile frameworks or discover their own ways of working at scale.

- Advanced collaboration features to support distributed teams.

- Support for regulatory compliance processes.

- Requirements modeling, analysis, and management.

■ Cyberphysical and Internet of Things development support.

This Magic Quadrant provides an evaluation of the major vendors of EAP tools.

Magic Quadrant

Figure 1. Magic Quadrant for Enterprise Agile Planning Tools

Source: Gartner (April 2020)

Vendor Strengths and Cautions

Atlassian

Atlassian is a Leader. Its EAP tool is Jira Align. Consider Atlassian if you are looking for a full-featured solution with framework support.

Atlassian acquired AgileCraft — a Leader in the previous edition of this Magic Quadrant — in April 2019 and subsequently rebranded it Jira Align. Atlassian offers a comprehensive solution for large organizations aspiring to embrace agile and DevOps. Its tool has built-in support for multiple

enterprise agile frameworks, including SAFe. Jira Align can combine data from many teams using varying methodologies and team-level tools, including Atlassian Jira Software with which it has excellent integration. It can track software changes from roadmap through DevOps toolchain to release.

Strengths

- Atlassian's Jira Align is a comprehensive solution that excels in many use cases.

- Atlassian offers a number of complementary tools and an extensive third-party marketplace for add-ons.

- Atlassian's Jira Align has a modern, simple and elegant UI.

Cautions

- Although its UI is elegant, Atlassian's Jira Align is very extensive, so it may take some time and analysis to find the best way to use it in an organization.

- Atlassian has been enhancing its enterprise sales capabilities, but its pricing remains largely fixed, though Atlassian has begun to negotiate on both terms and conditions and on pricing structure for multiyear Jira Align contracts.

- Jira Align supports a wide range of development practices, which may prolong the life of some undesired legacy processes in organizations that do not follow the tool's suggestions for improving execution.

Blueprint

Blueprint is a Visionary. Its EAP tool is called Storyteller. Consider Blueprint if you are looking for a product planning solution based on visual modeling.

Blueprint's offering is focused on agile portfolio management. Storyteller creates a visual model of the planned software and maps that model to stories, test plans and deployment automation. The visual metaphor is unique in the EAP tool market. It uses multilevel business process models, which offer the ability to drill down into each element, ultimately to flowchart representations at a detailed level throughout the development and release process. This focus on the visual model can make Storyteller a good choice for regulated industries. Storyteller also supports value streams and customer journey maps.

Strengths

- Blueprint's Storyteller uses a unique visual-model-based solution to represent everything from value streams to stories.

- Blueprint's product is focused on regulated industries and offers good support for plan-based development and behavior-driven development.

- Blueprint Storyteller's integration with other EAP tools is strong, so it may be used as part of a combined solution that requires regulatory compliance.

Cautions

- The visual model is key to Blueprint Storyteller. Customers who do not find the model view to be a compelling feature may find the product less effective.

- Blueprint's focus on regulated industries can make product planning unnecessarily complex for agile organizations without that requirement.

- Blueprint Storyteller addresses "nexus of design" thinking and concentrates on regulatory constraints and compliance management, which some users may find unfamiliar.

Broadcom

Broadcom is a Leader. Its EAP tool is Rally. Consider Broadcom if you want an all-round EAP tool with a strong history in the market.

Broadcom has rebranded CA Agile Central to Rally, which was the product's name prior to its acquisition by CA. It has good all-round functionality, and Broadcom has publicly announced an updated UI. Rally is available as part of Broadcom's Digital BizOps Starter Edition, which is free for up to 50 named users. Broadcom has a significant global presence both directly and via its partner network.

Strengths

- Broadcom offers strong functionality for all aspects of EAP.

- Broadcom shows a good understanding of the enterprise agile market and has a history of responding well to market changes.

- Broadcom has a large product portfolio with support for enterprise-scale agile and DevOps.

Cautions

- Broadcom focuses its direct efforts on its top enterprise clients. Smaller clients should ensure that they are comfortable with the impact of this on the level of direct service they receive.

- Broadcom has several integrations between Clarity Project Portfolio Management and Rally. Customers who are using the former need to consider how the two are used together when moving to product-focused development.

- Broadcom has introduced a consumption-based pricing model for its enterprise clients. Such clients will need to understand this model and may need to manage their licensing differently to receive the best value.

CollabNet VersionOne

CollabNet VersionOne is a Leader. Its EAP tools are VersionOne and Continuum. Consider CollabNet VersionOne if you are focused on (or migrating to) agile, and if you plan to implement Scrum, Kanban, Extreme Programming (XP) or an enterprise agile framework such as SAFe.

CollabNet VersionOne continues to be among the Leaders in the market with a number of innovations, notably scaling support via enterprise agile frameworks; and integration with value streams and DevOps pipelines. Over the past year, CollabNet VersionOne has continued to focus investment in its VersionOne product on value stream management, as well as collaboration (including a plug-in for planning poker). The company's backlog management and predictability, as well as its budgeting functions, also stand out. The VersionOne product has favorable and flexible licensing terms and strengths in terms of ease of implementation and use. It is available as SaaS or for on-premises deployment.

Note: CollabNet VersionOne (CollabNet) and XebiaLabs announced on 21 January 2020 that the two companies had merged. The content of this Magic Quadrant has not changed in any way as a result of this acquisition.

Strengths

- CollabNet VersionOne's top-to-bottom platform approach provides an enterprise agile solution that addresses multiple levels within an organization, from portfolio management to support for teams, and it enables companies to deploy value stream management.

- CollabNet VersionOne fully supports Scrum, Kanban, XP and SAFe methodologies, as well as the "Spotify model."

- CollabNet VersionOne has prebuilt integrations with (as well as orchestration support for) DevOps solutions such as Chef, Jenkins and Selenium.

Cautions

- Despite most reference customers for CollabNet VersionOne reporting ease of implementation, the product's extensive functionality and customizability mean that it requires some effort to set up properly.

- Although extensive DevOps tools integration exists, it falls behind that of other Leaders in this Magic Quadrant.

- Several reference customers for CollabNet VersionOne encouraged use of its training and on-site consulting, which has been highly rated, to ensure smooth adoption and consistent usage of the tool.

Digité

Digité is a Niche Player. Its EAP tools are SwiftKanban, SwiftEASe, SwiftEnterprise and SwiftSync. Consider Digité if you are looking for a full-function Kanban solution, and when complete enterprise-portfolio-level functionality is not essential.

This is Digité's second appearance in this Magic Quadrant, having received an Honorable Mention in 2018. It offers highly evolved Kanban functionality (SwiftKanban) with minimum and maximum work in progress (WIP) limits to enable improved flow. It also offers extensive card visualization customization, rules for sorting cards, and visualizes developer workloads for managing efficiency. Digité's standup Wizard is an innovative feature that supports standup efficiency. Forecast graphics show, among other things, how many cards a team can deliver and the probable cost of delay. Digité offers low-cost pricing options to encompass enterprise-level support. SwiftEASe supports SAFe 4.6, and SwiftEnterprise offers artificial intelligence/machine learning-enabled team health and project analytics.

Strengths

- Digité SwiftKanban is a complete Kanban tool. It offers a full range of functions and excellent flexibility, to enable scaling across dozens of teams.

- Digité has recently introduced a story-mapping capability that uses the company's visualization technology. Its SAFe PI Planning Program Board is also a nicely visualized strength.

- Through SwiftSync, Digité's products integrate with over 50 application life cycle management (ALM), CRM and DevOps tools, including Atlassian Jira Software, CA Agile Central, CollabNet VersionOne, Microsoft Azure DevOps and Slack.

Cautions

- Digité is not well-known outside India, except within the Kanban community, but it has established partnerships with companies such as Lean Kanban for training and support.

- Digité's strong Kanban roots permeate its various tools, and some nuances can catch pure Scrum or SAFe organizations by surprise.

- Digité's tools have evolved largely in support of Kanban service providers and product development companies, though they are now used in a much wider variety of enterprises in areas including corporate IT.

Favro

Favro is a Niche Player. Its EAP tool is also called Favro. Consider Favro if you want a highly flexible, collaborative tool that enables teams to adopt individual ways of working.

Favro tracks work items as rich, highly configurable cards, each of which can be displayed on multiple boards and in multiple views. Because it is so highly flexible, Favro can support enterprise agile frameworks such as SAFe. Its true strength, though, lies in its ability to adapt to any team's way of working.

Strengths

- Favro's flexibility makes it suitable for a wide range of applications, and is not limited to software development.

- Favro's ability to show a given card on multiple boards helps enhance team collaboration.

- Favro's cards can capture many different types of information, so a separate documentation tool may not be needed.

Cautions

- Favro is better suited to organizations that support autonomous teams that have individual ways of working than those that prefer a standard methodology.

- Favro offers templates for EAFs such as SAFe and the "Spotify Model," but these templates provide less process guidance than tools from Leaders in this Magic Quadrant.

- Favro is a small company with limited geographic presence.

GitLab

GitLab is a Visionary. Its EAP tool is also called GitLab. Consider GitLab if you are looking for solid capabilities from a major Git provider with a focus on DevOps.

GitLab offers a modern product that is well-integrated with Git. It offers solid support for organizations managing a product portfolio. It also supports distributed teams, and shows a focus on the entire continuous integration/continuous delivery (CI/CD) chain and product value stream.

Strengths

- GitLab's product has strong Git integration, which strengthens its support for the complete delivery life cycle.

- GitLab offers strong team collaboration support, including integration with Slack, Microsoft Teams and others.

- GitLab offers strong support for DevOps and visibility to stories through the DevOps toolchain.

Cautions

- GitLab's product provides limited functionality above the project/product level.

- Beyond the integration mentioned above, GitLab offers limited prebuilt integration with third-party tools, but does offer an open API.

- GitLab's reference customers reported the lowest satisfaction with the value the product provides for the money spent of all vendors in this Magic Quadrant.

IBM

IBM is a Niche Player. Its EAP tool is IBM Engineering Workflow Management. Consider IBM if you are a large enterprise using SAFe in a regulated industry.

IBM has rebranded Rational Team Concert as IBM Engineering Workflow Management. IBM offers a wide range of products and services in the application development sector. Its global presence and service arm enable it to serve customers in any region. IBM's enterprise agile strategy centers on SAFe, with an emphasis on use within regulated industries.

Strengths

- Via IBM Global Business Services, the vendor can scale up to meet the needs of large, complex technology and business transformation initiatives in any region.

- IBM's product roadmaps accommodate users of its "legacy" products by providing support and transition paths.

- IBM has a comprehensive suite of application development life cycle management (ADLM) products covering the full life cycle.

Cautions

- IBM Engineering Workflow Management's support for regulated, high-control environments may reduce its suitability for those seeking a highly flexible solution.

- IBM Engineering Workflow Management lacks the modern user experience features of some of its competitors.

- IBM Engineering Workflow Management is part of a suite of tools that has been rebranded, and IBM's positioning of this suite relative to its other ADLM tools can be confusing.

IBM did not respond to requests for supplemental information. Therefore, Gartner's analysis is based on other credible and accepted public sources.

Inflectra

Inflectra is a Niche Player. Its EAP software product is SpiraPlan. Consider Inflectra if you are looking for a comprehensive ADLM solution for a regulated environment requiring traceability from requirements to tests.

Inflectra SpiraPlan appeals to highly regulated industries like healthcare, life sciences, finance, insurance, energy, industrial and public sectors. SpiraPlan is designed to be flexible and straightforward. It offers an extensible ecosystem via its integration capabilities, and supports hybrid approaches.

Strengths

- Inflectra supports several U.S. and European regulatory requirements and has a well-focused market strategy.

- Inflectra's integrated ADLM approach considers the different needs of testers, developers and managers.

- Inflectra offers multiple collaboration features and comprehensive integration with developer tools.

Cautions

- Inflectra SpiraPlan's functionality suits traditional project management organizations, and is still evolving in terms of comprehensive product management and agile practices, including SAFe.

- Most of Inflectra's customers are from the U.S. and Europe, and it has yet to scale its operations globally.

- Inflectra's reference customers surveyed for this Magic Quadrant reported initial stability problems on its latest software, but praised Inflectra for its ability to attend to customer needs quickly.

Micro Focus

Micro Focus is a Niche Player. Its EAP tools are ALM Octane and Project and Portfolio Management. Consider Micro Focus if you use a mixture of waterfall and agile processes, if you want a complete ADLM solution, or if you have a strong investment in this vendor's quality tools.

Micro Focus has a broad portfolio of assets for planning and requirements through to quality assurance and release. However, ALM Octane is still a relatively new product, one that generally enters organizations on the back of the vendor's legacy software for quality and test management. ALM Octane and Project and Portfolio Management provide a good solution for organizations focused on supporting compliance and traceability.

Strengths

- Micro Focus' products span the full range of software development activities, from requirements through to CI/CD. This enables a high degree of visibility across the software value stream.

- Micro Focus supports both agile and nonagile projects, which may help customers moving to agile.

- The foundation of ALM Octane is the product's focus on software quality. Unlike the majority of solutions, ALM Octane integrates testing capabilities.

Cautions

- Micro Focus has not significantly enhanced its reporting capabilities, which reference customers have in the past observed are immature.

- Micro Focus' support for enterprise agile processes and portfolio management lags behind that of the Leaders in this Magic Quadrant.

- Because Micro Focus' products provide more than just agile planning capabilities, they are more expensive than those of many others in this market. This may also make them less appealing to organizations that have other tools in place for the other aspects of ADLM.

Micro Focus did not respond to requests for supplemental information. Therefore, Gartner analysis was based on other credible and accepted public sources.

Microsoft

Microsoft is a Challenger. Its EAP tools are Azure DevOps and GitHub. Consider Microsoft if you are a Visual Studio or Azure user wishing to take advantage of native Microsoft integration, or if you want to use an open-source-inspired "innersourcing" model.

Microsoft offers two distinct EAP tools. Azure DevOps provides a broad suite available on-premises or in the cloud, committed support for open-source technologies, and integration with Git and DevOps tools. GitHub offers comparable functionality, but emphasizes an open-source approach to development.

Strengths

- Microsoft offers social streams and work item history in Azure DevOps to improve collaboration between, and traceability for, developers.

- Microsoft's focus is on supporting the work of individuals on development teams. It goes beyond planning and status reporting of items by enabling users to drill down into specific workflows and tying branch/merge actions and defects directly to story cards.

- Microsoft offers a broad range of developer training options and certifications, as well as a large ecosystem of product extensions.

Cautions

- Microsoft's support for a product-driven approach in Azure DevOps is still evolving.

- Microsoft does not support enterprise agile frameworks natively. Instead, it relies on partners for such support.

- Microsoft's strategy for Azure DevOps and GitHub is still unfolding. Customers deciding between the two should consult Microsoft for guidance.

Microsoft did not respond to requests for supplemental information. Therefore, Gartner analysis was based on other credible and accepted public sources.

Planview

Planview is a Leader. Its EAP tool is called Planview Lean and Agile Delivery. Consider Planview if you are adopting agile in an organization with a strong and mature PPM practice.

Planview has made notable improvements to its tool, mostly in the backlog management functionality. This enhances the tool's support for SAFe implementations and releases, and its epic forecasting capabilities. Its integration with third-party tools is through a partnership with Tasktop, which provides a multitude of options. There is good visibility to stories through the DevOps toolchain. The best-of-breed project and portfolio management (PPM) and Kanban functionality remains strong. The solution supports organizations starting an agile journey by linking strategic and product portfolios, programs and projects to agile teams. The Kanban portion of the tool can also support nondevelopment areas, such as operations, business strategy, portfolio management and education.

Strengths

- Planview's product provides strong program and portfolio support.

- Planview provides excellent Kanban support.

- Planview's product supports organizations with many differing degrees of agile competency.

Cautions

- Planview's solution has a steep learning curve, due to its complexity.

- Planview's strong support for PPM could lead some users to continue the use of legacy processes in organizations seeking to move to a product-based delivery model.

- Some reference customers reported not being satisfied with the quality of Planview's peer user community.

ServiceNow

ServiceNow is a Challenger. Its EAP tool is called IT Business Management (ITBM). Consider ServiceNow if you are a user of ServiceNow's Now Platform and want to leverage the planning, development and implementation functionality of the platform.

ServiceNow is an established vendor in the IT service management sector, where it provides infrastructure and operations organizations with leading solutions. Its EAP product is targeting the midsize to very large enterprise market. In 2019, it expanded its support for SAFe, extended its integration with third-party tools (such as Atlassian Jira Software and Microsoft Azure DevOps), and added good visibility to stories in the DevOps toolchain through the ServiceNow DevOps product integration.

Strengths

- ServiceNow ITBM provides a broad set of functionality, including agile portfolio, financial, agile development, enterprise architecture and team capabilities. It provides good agile program and portfolio-level planning and tracking functionality.

- ServiceNow ITBM is fully integrated with ServiceNow's Now Platform, and it integrates operational work with development work in a single, unified backlog.

- ServiceNow ITBM integrates well with ServiceNow's DevOps product and brings excellent visibility to stories through the DevOps toolchain.

Cautions

- ServiceNow ITBM's Scrum and Kanban support is average, though most essential features are supported.

- ServiceNow ITBM provides only basic product roadmapping capabilities.

- ServiceNow ITBM's SAFe support is average. Organizations implementing SAFe should ensure this level of functionality will meet their needs.

Siemens

Siemens is a Niche Player. Its EAP tool is Polarion ALM. Consider Siemens if you are creating systems in a quality-sensitive, regulated environment using agile methods.

Siemens offers a solution with an emphasis on quality engineering and traceability. Organizations in regulated environments, and whose processes are subject to audit, will find it appealing. Siemens is a Scaled Agile Partner and the product supports version 4.6 of the framework (the company will support SAFe 5.0 in its spring 2020 release).

Strengths

- Siemens has a significant global presence. It can serve customers in any region.

- Siemens' solution covers many aspects of the software development process.

- Siemens has a strong vision for "cyberphysical" and embedded systems, so organizations creating such systems may find its direction appealing.

Cautions

- Siemens' Polarion ALM has limited release-forecasting capabilities.

- Polarion ALM's SAFe functionality is currently limited, but Siemens will support SAFe 5.0 in its spring 2020 release.

- Siemens' solution has only basic product roadmapping functionality.

Targetprocess

Targetprocess is a Leader. Its EAP tool is also called Targetprocess. Consider Targetprocess if you are looking to apply lean and agile development at scale across your organization.

Targetprocess offers a flexible solution at the team level with excellent support for Kanban- and Scrum-based practices. Targetprocess enables both project and product portfolio management, as well as SAFe and several other scaling frameworks. It will appeal to organizations getting started with, or maturing, their agile capabilities and anticipating a shift from project-based to product-based practices.

Strengths

- Targetprocess provides extremely good support for Kanban. It also supports Scrum well and several enterprise agile frameworks, including SAFe. Targetprocess can support portfolio management on top of either Atlassian Jira Software or Microsoft Teams solutions. It can scale from team to enterprise level.

- Targetprocess provides strong support for remote workers through collaboration tools and for private, public or vendor-hosted clouds.

- Targetprocess has excellent integration capabilities. It supports both native and tool-enabled integration with DevOps pipeline tools.

Cautions

- Targetprocess is a steadily growing company, but remains small relative to its leading competitors.

- Targetprocess' sales strategy is primarily direct, which limits its sales presence. The company intends to increase its channel sales.

- Targetprocess' geographic coverage remains weaker than that of other vendors in this Magic Quadrant. It has a much smaller presence in the U.S. than the other Leaders have, and most of its employees are based in Europe.

TCS

TCS is a Niche Player. Its EAP tool is Jile. Consider TCS if you are adopting agile and want a low-cost SaaS solution.

Jile is a relatively new product that supports a product-team-centered approach to the delivery of solutions, and the management of teams and products via a portfolio-based approach. As with others in this market, the product has expanded its functionality significantly in the past year. TCS has improved its user interface and has configurability that supports different agile ways of working using templates (including SAFe, Disciplined Agile, LeSS and more) that teams can configure based on where they are in their agile transformation journey. Reference customers are generally happy with their experience of the product and with the availability of 24/7 support. Usage tends to be at a departmental level, or smaller.

Strengths

- TCS Jile's integrated support for persona development is helpful for a customer-centered approach to product planning.

- TCS Jile has improved its user interface and has nice configurability for different ways of working, including SAFe, disciplined agile and LESS.

- TCS offers value-based pricing at $9 per user, per month before volume discounts.

Cautions

- TCS continues to expand its third-party partnerships and integration options, but has fewer options than vendors of leading tools.

- TCS Jile is available only as a service. There is no on-premises option.

- Although organized with a product portfolio approach, TCS Jile's portfolio-level functionality is limited, compared with that of the Leaders in this market.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

- Favro

Dropped

- AgileCraft

- Panaya

Inclusion and Exclusion Criteria

Inclusion criteria for each vendor were as follows:

- The vendor must have at least two customers with 500 or more licensed, paid users of at least one of its product(s).

- The vendor must have at least 10,000 licensed, paid users of at least one product.

- The vendor must provide services including support and training for, as well as implementation of, the product(s).

- The vendor must have a direct presence (that is, at least one office) in each of the following regions: EMEA, Asia/Pacific and the Americas.

- The product(s) must be provided to customers via the cloud.

- The product(s) must include a RESTful integration API and a capability to integrate with a DevOps toolchain.

- The product(s) must support one of the following use cases, which the vendor had to demonstrate during the Magic Quadrant process, and which it had to offer and actively market as of 1 October 2019:

  - **Single Scrum team:** The tool is used to plan and track the activities of a single Scrum team doing time-boxed development.

  - **Single Lean/Kanban team:** The tool is used to track and coordinate the activities of a single lean/Kanban team doing continuous development.

  - This must include the following work item tracking functionality:

    - Management of a prioritized backlog with at least one level above story (for example, epic, theme or feature).

    - Tracking of WIP in a Scrum or Kanban board.

    - Tracking and visualization metrics using burndown/burnup charts for Scrum.

    - Calculation of cycle time and support for WIP limits for Kanban.

- In addition, the product(s) must support at least one of the following use cases, which the vendor had to demonstrate during the Magic Quadrant process, and which it had to offer and actively market as of 1 October 2019:

  - **Product portfolio:** The tool is used to plan and track a set of tribes, each made up of two to nine teams assigned long-term to a single product set.

  - **Project and program portfolio:** The tool is used to plan and track a large set of 10 or more teams working on a portfolio of projects and/or products.

  - **Scaled Agile Framework (SAFe):** The ability to plan and track work using Portfolio SAFe, as documented in version 4.6. This use case does not cover Essential SAFe.

  The following SAFe artifacts must appear by name in the product(s):

  - Release trains

  - Program increments

- Value streams

- Lean portfolio

Honorable Mentions

Several vendors did not meet our requirements for inclusion in this Magic Quadrant. These vendors may have strong product functionality but not the required revenue or product distribution. Some of these vendors may work well for SMBs and offer a better corporate fit for such companies, but they do not target large enterprises or portfolio approaches. We will continue to evaluate the following vendors, some of which may justify inclusion in your evaluation process now or in the future:

- Agile Cockpit

- Axosoft

- Clubhouse

- DevFactory

- Panaya

- Perforce

- Scrumwise

- TechExcel

- VMware

Evaluation Criteria

Ability to Execute

There are three key aspects to a vendor's Ability to Execute:

1. Its product(s)

2. Its ability to convey a persuasive message

3. The customer experience it provides.

We measure these aspects partly by studying responses to surveys, reviewing our client interactions, and consulting online materials such as social media posts. Together, this evidence tells a story about how well a vendor is getting its product to market, evolving it in a consistent way, and responding to market change. It also helps us see whether a vendor's message is resonating with prospective customers, and whether existing customers are likely to stay with that vendor because they are satisfied with it and its direction.

Also significant are differences in the size of vendors, their growth rates, the frequency with which Gartner clients mention them, and the size of their user communities.

Of the Ability to Execute criteria weighted "high," the most variation in scores is seen in customer experience (see Table 1). This makes it an important differentiating factor.

Table 1: Ability to Execute Evaluation Criteria

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

Source: Gartner (April 2020)

Completeness of Vision

The key Completeness of Vision criteria are market understanding and offering (product) strategy, which are therefore weighted "high" (see Table 2).

Market understanding encompasses a vendor's understanding of how the market is evolving, how to build a position that resonates with users and, especially, how to approach the use cases, as well as support enterprise agile and user pathways toward DevOps. We found that most vendors want to position themselves as servicing all the use cases, even though many could benefit from a narrower focus. Scores for both these criteria cover a wide range, which contributes to much of the spread in vendors' positions.

We also weighted the innovation criterion "high." In this area, we consider how vendors are applying technologies such as machine learning to their tools. There is considerable spread in the scores for this criterion, which suggests that some vendors are differentiating themselves through innovation.

We weighted geographic strategy "low" as many EAP tools are delivered via the internet. Support and services are also handled in this fashion. However, if geography is important to you, it is

important to evaluate a vendor's options, including its sales and support personnel and those of its partners.

Note that Completeness of Vision includes a variety of other elements. "Vision" is more than just a vision for the market with respect to products — it is also a vendor's ability to approach the market via its go-to-market strategy, with differentiation and so on.

Table 2: Completeness of Vision Evaluation Criteria

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

Source: Gartner (April 2020)

Quadrant Descriptions

Leaders

Leaders have shown they have a strong vision, either by leading agile thought or combining agile practices with developer collaboration and DevOps. Leaders have broad market reach and adoption (as evidenced by Gartner client inquiry and survey data, as well as their growth and market presence). Leaders are safe choices for large-scale adoption and we expect them to continue to have a solid market presence. Leaders have established marketplaces that provide them with extended functionality via partners. They also have strong networks for training and implementation, and the ability to operate well globally.

Challengers

Challengers have a broad market reach and large deployments. They have strong execution capabilities (as evidenced by financial resources) and a significant sales and brand presence. In

general, however, Challengers are not seen as driving the market as strongly as Leaders or Visionaries.

Visionaries

Visionaries have an established customer base, but they may encounter execution challenges as they continue to grow and develop products with ambitious roadmaps. They may also be under threat from larger competitors, should those competitors change their plans and product strategies. They will be attractive to organizations with mature enterprise agile practices that are looking to use agile as part of a digital business strategy.

Niche Players

Niche Players offer solid products, but are limited in their market reach or breadth of use-case coverage. They often have very solid customer satisfaction and, depending on your particular needs, may offer very solid functionality. However, they typically have fewer integrations and partners, and lack overall global market presence. They are solid choices for team/product use or for enterprises that are self-sufficient.

Context

Organizations selecting vendors and products in this market must have clear strategies for targeted use and support. EAP tools provide important functions, but they must be aligned with and supported by the culture and practices of the organization that uses them. Different organizations will have different requirements (such as regulatory compliance) that may constrain them to specific practices, or they may face cultural barriers that affect commitments and collaboration.

Organizations are at different levels of maturity in terms of the adoption of agile practices. They also have different constraints and goals.

There are a few things to keep in mind when selecting an EAP tool vendor:

- Choose tools that suit your company's culture and compliance needs. Some cover a much broader array of functions (requirements management and test management, for example), which leads to a stronger single platform when traceability and compliance are important. Each company should evaluate potential vendors and tools against its specific use cases.

- Select tools that suit the rest of your software delivery suite and DevOps toolchain. Alternatively, be prepared to pay extra for integration facilities.

- Grow into your tools. Don't "turn on" every feature and try to build complex workflows and reports right from the start. Too often, you will miss out on the benefits of agile by replicating the complex workflows and reports of waterfall governance. Start simply and add features as needed.

- Many organizations have more than one product in use. This may be because of the different needs of various lines of business, because of a bimodal approach to IT, or because merger and

acquisition activity has brought in well-functioning teams with tools different from the current standards. Results are more important than uniformity, but uniformity can be addressed by implementing a "roll-up" strategy from team-level tools to stronger, portfolio-focused offerings.

- Lean tools have applicability beyond the IT organization. Our focus in this Magic Quadrant is on the needs of agile development organizations. But some of these needs also apply to teams outside the IT organization, for which there are many products not covered in this Magic Quadrant.

Market Overview

The effect of new entrants to the market, which we originally saw in the 2018 edition of this Magic Quadrant, has reached its full impact. Three of this year's Leaders are new — one (Atlassian) because of its acquisition of a past Leader, and two more through growth and increased maturity. Meanwhile, many past Leaders continue to struggle.

Broadly speaking, vendors in this market fall into four categories:

1. Traditional application development life cycle management (ADLM) vendors that have added team-level agile and EAP features to their existing products.

2. Vendors whose products began as team-level agile tools, and that have added EAP capabilities to their products.

3. Native EAP tool vendors. These tend to be newer entrants, reflecting the fairly recent emergence of enterprise agile.

4. Vendors from adjacent markets that have acquired enterprise agile products, or that have built enterprise agile capabilities into their existing products.

In general, traditional ADLM vendors struggle, perhaps because of the significant differences between agile and older development approaches. Native EAP tool vendors often have a strong vision and good product capabilities, but may struggle with execution as they enter a market dominated by incumbents. Vendors originating as team-level tool providers are often established in the market and tend to be Leaders (a status sometimes achieved, in part, by having acquired a native EAP tool vendor). Some adjacent market vendors are gaining prominence as they draw on their existing customer base and mature their EAP products.

We see the following trends driving this market:

- Agile continues to be the leading software development methodology. One in five organizations have implemented an enterprise agile framework, as shown by the 2019 Gartner Agile in the Enterprise Survey. [1]

- Experience with enterprise agile methodologies — such as the Scaled Agile Framework (SAFe), the "Spotify model," Large-Scale Scrum (LeSS), Disciplined Agile (DA), and Nexus — is growing.

- Clients with a legacy mix of tools are examining their tool strategies with a view to managing licensing, controlling costs, and creating well-integrated toolsets that meet the needs of teams and leaders alike.

- Public-sector and regulated industries, many of which have lagged behind in terms of agile adoption, are showing increased interest in developing enterprise-scale agile capabilities.

- The increasing use of DevOps and its extension into the business means that parallel strategic commitments to agile development and governance are required.

- The drive to provide continuous value has led enterprises to shift from a project-based software delivery approach to one that treats applications as products. The corresponding shift to product management places new demands on EAP tools. The product model takes many different forms, further driving custom demand for product flexibility.

Tools in this category must enable the use of agile in the enterprise, which means supporting agile practices that span the organization and that encompass the largest software development efforts (see "Market Guide for Enterprise Agile Frameworks"). The tools evaluated in this Magic Quadrant have capabilities for planning and collaborating at a team level, but also provide functionality that enables scaling across multiple teams. The relative degree of focus on a team level, rather than an enterprise level, varies from product to product.

Historically, these tools have represented an evolution from team-level and project-centric agile tools and traditional ADLM tools, though newer tools are built for enterprise agile from the ground up. Most products in the EAP tool market integrate with the whole software development value stream, acting as hubs for the definition and management of work items all the way from inception to production.

There is a relationship between EAP tools, project portfolio management (PPM) tools and product management tools. Traditional PPM tools provide the high-level planning and resource management that enterprises demand, but may lack enterprise-class agile development support. EAP tools may not support project management outside agile frameworks (Gartner has a separate "Magic Quadrant for Project and Portfolio Management").

Meanwhile, the shift from *project*-based to *product*-based software development is making product management and roadmapping an important capability (see "Market Guide for Product Management and Roadmapping Tools").

Vendors are responding to customer demand for solutions that include PPM, EAP and product management through acquisitions, new development, integration and partnerships. Machine learning, while still promising, is a less pronounced component of the product visions of some vendors. We expect that vendors will continue to seek mergers, acquisitions and partnerships to enhance their coverage of the software development value stream, although these opportunities will naturally decrease.

Adoption and Decision Criteria

EAP software continues to serve a wide variety of end users, but team-level users still outweigh management-level users. Reference customer survey results show that team-level roles, such as development team lead or Scrum Master (82% of installations), developer (81%), tester/QA (77%), and product owner (81%) are the most common.

Management users are slightly less prevalent. Product managers (70%), project managers (74%) and middle management (54%) are the most widely seen. The reference customers of Atlassian, Broadcom (CA Technologies) and CollabNet VersionOne reported average user counts above 500 users per installation. Other vendors range from a low of about 50 (TCS) to a high of about 360 (Digité).

There was a slight decrease in newer users among the reference customers surveyed (55% have been using their EAP tool for less than three years, versus 62% last year), possibly as a result of fewer new vendors emerging. Core agile practices continue to be widely used by reference customers (over 75%), though. XP practices, such as pair programming, refactoring and test-driven development, remain at or below 50% adoption. New practices such as behavior-driven development and exploratory testing have yet to reach even 25% of reference customers.

Changing the development culture was the most commonly reported challenge to agile adoption again this year (65% of reference customers reported it as a challenge). This corresponds to the results of Gartner's 2019 Agile in the Enterprise survey. We expect that customers will begin to look for culture-related insights from EAP tools.

The list of other significant challenges is similar to those seen in the past. It includes:

- Building consistent practices (63%)

- Working with teams using traditional development methods (52%)

- Training (42%)

- Expanding agile outside the developer core (42%)

- Management expectations or lack of management support (42%)

- Implementing nonintrusive governance (39%)

Users continue to choose tools for a broad range of reasons, but the most often identified are:

- Driving practice adoption (57%)

- Coordinating teams (54%)

- Creating internal/external operational efficiencies (51%)

- Increasing product/project visibility (49%)

- Improving business process agility (49%)

Most organizations consider several tool providers before making their decision. Atlassian remains the most frequently identified as being "under consideration," followed by Microsoft and ServiceNow.

Product functionality and performance remain the major factors driving purchase decisions. Customer focus, along with product roadmap and future vision, is also significant.

Satisfaction

In general, surveyed users were relatively satisfied with their vendors. On a five-point scale:

- Overall experience satisfaction scores ranged from a high of 4.89 to a low of 4.00, with an average of 4.51. This is slightly above last year's average of 4.41.

- Ratings of the value received rose slightly again this year (to 4.28 from 4.18), with 1% dissatisfied and 9% neutral.

- Satisfaction with ease of integration using standard APIs and tools remained somewhat low (average 3.95, versus 3.89 last year).

- Overall service and support satisfaction increased slightly (an average of 4.54, versus 4.45 last year).

Acronym Key and Glossary Terms

ADLM	application development life cycle management
ALM	application life cycle management
CI/CD	continuous integration/continuous delivery
DA	disciplined agile
DAD	disciplined agile delivery
DSDM	dynamic systems development method

Evidence

[1] 2019 Gartner Agile in the Enterprise Survey:

This survey was conducted online from 3 June through 25 June 2019, among Gartner Research Circle Members — a Gartner-managed panel of IT and IT-business professionals.

- In total, 130 members participated, of which 87% used agile for at least some of their application development.

- Qualified participants included business end users with an IT or IT-business focus to their primary role.

- The survey was developed by a team of Gartner analysts, and reviewed, tested and administered by Gartner's Research Data and Analytics team.

This Magic Quadrant reflects a broad-based research effort involving:

- Discussions with users of Gartner's client inquiry service about agile and application development project management tools.

- Many in-person discussions and other interactions with the vendors featured in this Magic Quadrant.

- A detailed vendor survey requiring responses to more than 200 questions.

- A Gartner survey of organizations using online tools, conducted from October through December 2019. The survey participants were reference customers nominated by each of the vendors in this Magic Quadrant. These customers were asked 40 questions about their experiences with their vendors and solutions. The results were used to support our assessment of the EAP market and its vendors. We obtained 95 full responses representing companies headquartered in several different regions of the world.

- Insights into each vendor's ability to support specific functions and use cases gained from live product demonstrations.

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

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: 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.