

Magic Quadrant for Enterprise Agile Planning Tools

Published 18 April 2019 - ID G00361074 - 40 min read

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As organizations mature their enterprise-scale agile capabilities, established vendors refine their offerings and new providers emerge. This Magic Quadrant evaluates 17 vendors of enterprise agile planning tools to help you make the right choice for your organization.

Market Definition/Description

This document was revised on 26 April 2019. The document you are viewing is the corrected version. For more information, see the [Corrections](#)

(http://www.gartner.com/technology/about/policies/current_corrections.jsp) page on gartner.com.

Enterprise agile planning (EAP) tools help organizations make use of agile practices at scale to achieve enterprise-class agile development. This is achieved by supporting practices that are business-outcome-driven, customer-centric, collaborative and cooperative, in conjunction with continual stakeholder feedback. These tools represent an evolution from project-centric agile tools and traditional application development life cycle management (ADLM) tools. The majority of products in the EAP tool market play into the overall ADLM product set, acting as hubs for the definition and management of work item tracking.

There is a relationship between EAP tools, project portfolio management (PPM) tools and product roadmapping tools. Traditional PPM tools provide the high-level planning and resource management enterprises demand, but may lack enterprise-class agile development support. EAP tools, for their part, may not support project management outside agile frameworks. (Gartner has a separate Magic Quadrant for PPM, the latest being “Magic Quadrant for Project Portfolio Management, Worldwide”). Meanwhile, the shift from project-based to product-based software development is making product roadmapping an important capability (see “Market Guide for Product Management and Roadmapping Tools”). Vendors are responding to their customers’ needs for solutions that include PPM, EAP and product roadmapping through acquisitions, new development, integration and partnerships.

This Magic Quadrant evaluates vendors of tools focused on the development of software through the use of agile methodologies. Overall, we see several trends driving procurement decisions for these tools:

- Agile is the leading type of software development methodology, and enterprise agile framework adoption remains strong, as shown by the 2018 Gartner Agile in the Enterprise

Survey (see the Evidence section).

- Experience with enterprise agile frameworks such as the Scaled Agile Framework (SAFe), Large-Scale Scrum (LeSS), Disciplined Agile (DA), Nexus and Scrum at Scale is growing.
- Clients with a legacy mix of tools are examining their tool strategies with a view to managing licensing, controlling costs, and creating a well-integrated toolset that meets 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.

Agile development methodologies are highly accelerated, iterative development processes. They 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

The principles of collaboration, continuous integration, refactoring and promoting ownership also become key product capabilities. As enterprises scale up their use of agile, they also need products to help them manage dependencies between teams and coordinate the timing of their deliverables.

Tools in this category should 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”). Thus, 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. That said, the relative focus and strength on the team level versus the enterprise varies from product to product.

Successful tools will also function as part of an overall DevOps toolchain, serving as a hub for information that will be used for planning and creating measurements of value delivery (see

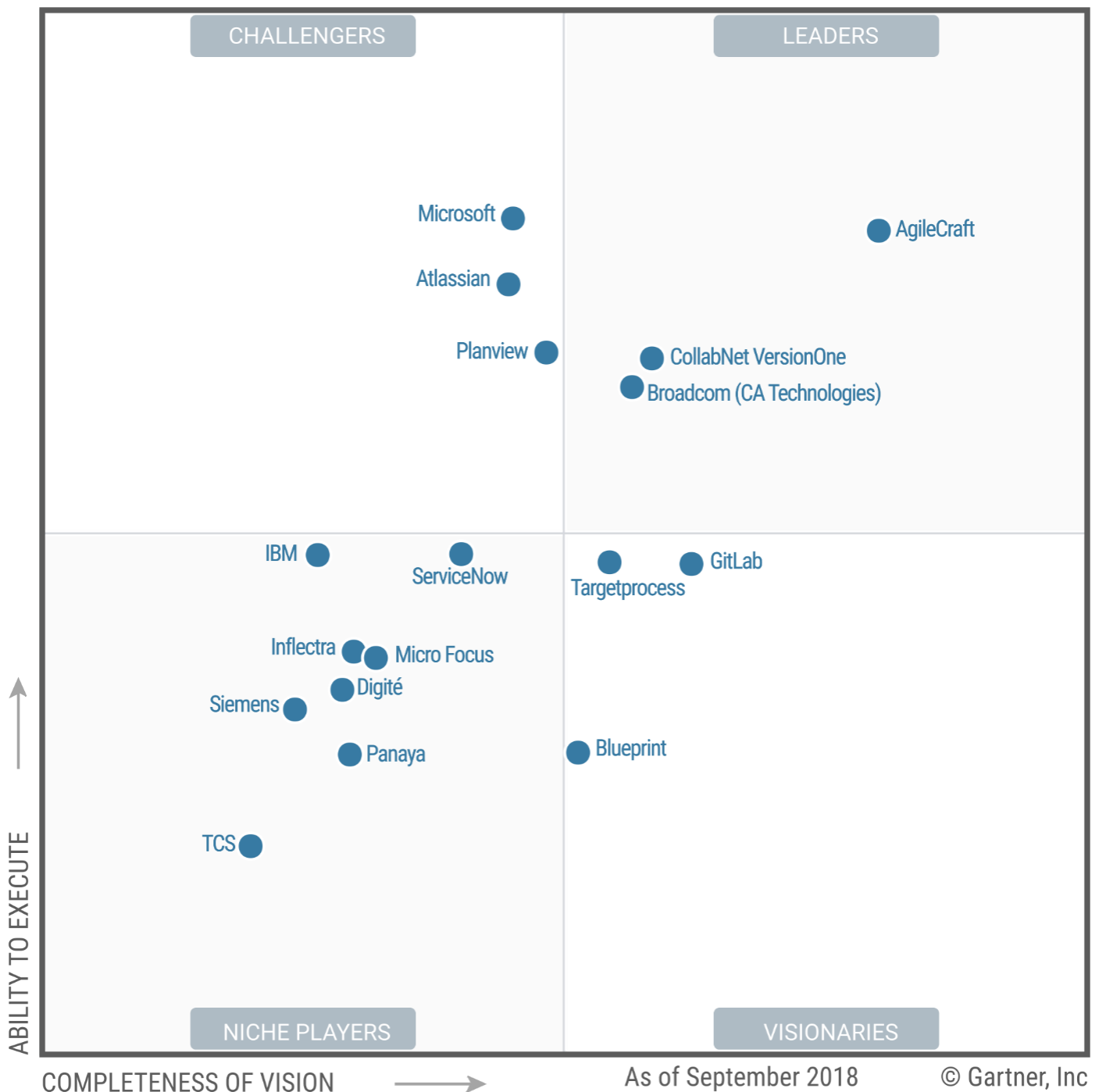
“Avoid Failure by Developing a Toolchain That Enables DevOps”). Some tools and customers may apply this information to machine learning. We expect customers to monitor key metrics using, for example, a key performance indicator (KPI) dashboard that includes:

- 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

We expect such a KPI dashboard to be made available to all stakeholders (see “Use the Right Metrics in the Right Way for Enterprise Agile Delivery”).

Magic Quadrant

Figure 1. Magic Quadrant for Enterprise Agile Planning Tools



Source: Gartner (April 2019)

Vendor Strengths and Cautions

AgileCraft

AgileCraft is a Leader. Its EAP tool is also called AgileCraft.

Consider AgileCraft if: you are looking for a full-featured solution with framework support.

AgileCraft 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. AgileCraft can combine data from many teams using varying methodologies and team-level tools. It can track software changes from roadmap through DevOps toolchain to release.

Atlassian announced on 18 March 2019 that it has entered into a definitive agreement to acquire AgileCraft. The content of this Magic Quadrant has not changed in any way due to this pending acquisition. We recommend considering each vendor's offering independently for now, as it will be a considerable time before it is possible to evaluate the combined company or its product lines.

Strengths

- AgileCraft provides a comprehensive solution that satisfies many use cases.
- AgileCraft's product can seamlessly support teams using AgileCraft, Atlassian Jira and Microsoft Team Foundation Server for story tracking.
- AgileCraft has a modern, simple and elegant UI.

Cautions

- Although its UI is elegant, the AgileCraft solution is very extensive, so it may take some time and analysis to find the best way to use it in your organization.
- AgileCraft is one of the newer vendors in this market. It does not have as long a track record as some of its competitors.
- AgileCraft 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.

Atlassian

Atlassian is a Challenger. Its EAP tools are Jira, Confluence and Portfolio.

Consider Atlassian if: you are looking for a team-level solution for both agile and traditional development, when advanced portfolio-level functionality is not essential.

Atlassian's solution focuses on task management, including work item management, defect tracking, team-level collaboration, and options for integration with a wide range of other tools. The vendor offers its solution both on-premises and in the cloud, but does not have an enterprise sales team — instead, it offers online purchasing via credit card. Atlassian's large installed base helps ensure that customers ready access to experienced users and support for best practices globally.

Atlassian announced on 18 March 2019 that it had entered into a definitive agreement to acquire AgileCraft. The acquisition was completed on 1 April 2019. The content of this Magic Quadrant has not changed in any way due to this acquisition.

Strengths

- Atlassian Jira is the leading team-level tool. It offers easy-to-learn and easy-to-use Scrum team functionality at an attractive price.

- A large customer base for Jira ensures a strong third-party market via the Atlassian Marketplace. Atlassian also has nearly 500 channel partners.
- External orchestration for Git and continuous integration (CI) solutions through the Bitbucket and Bamboo add-ons positions Atlassian to attract organizations implementing DevOps practices.

Cautions

- Partly due to its limited portfolio capabilities, Jira does not provide native support for SAFe or other leading scaling approaches, although Atlassian's partners do offer solutions.
- Jira's reporting capabilities are complex to set up and not straightforward to access, but some reports are provided out-of-the-box, and the Atlassian Marketplace offers options to use partners' solutions.
- Some of Atlassian's collaboration features were formerly provided by Atlassian HipChat and Stride, which have been discontinued. Instead, collaboration is now provided via Confluence, and through partnerships with vendors such as Slack, Zoom and Microsoft.

Blueprint

Blueprint is a Visionary. Its EAP tool is Storyteller.

Consider Blueprint if: you are looking for an EAP solution based on visual modeling.

Blueprint's offering is unique in this market in that Storyteller starts with a visual model of the planned software and maps that model to stories, test plans and deployment automation. The visual metaphor is a high-level flowchart, which offers the ability to drill down into each element. Elements can be tracked throughout the development and release process. This focus on the visual model can make Storyteller a good choice for regulated industries.

Strengths

- Blueprint's product 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.

Cautions

- The visual model is key to Blueprint Storyteller, so it will not be effective if the model view is not seen as compelling.

- Blueprint's focus on regulated industries can make product planning cumbersome for some agile organizations.
- Blueprint Storyteller addresses a diverse range of user roles, but this can make usability suboptimal for some users.

Broadcom (CA Technologies)

CA Technologies is a Leader. Its EAP tool is CA Agile Central.

Consider CA if: you want best-of-breed agile project, program and portfolio management. CA Agile Central blends team-level functionality with PPM features. It has strengths in SAFe support, collaboration and portfolio management.

In 2018, CA was acquired by Broadcom. Henceforth, the company will focus its direct sales, marketing and support efforts on the largest enterprises, in keeping with Broadcom's strategic direction, while using partners to serve smaller accounts.

Strengths

- CA offers strong functionality for agile project, program and portfolio management.
- CA shows a good understanding of the enterprise agile market and has a history of responding well to market changes.
- CA has a large product portfolio with support for enterprise-scale agile and DevOps.

Cautions

- Broadcom's stated intention is to focus its direct efforts on its enterprise clients and to keep CA Agile Central as part of its product line. Potential customers should ensure they understand the product's development roadmap.
- CA has several integrations between CA Project & Portfolio Management and CA Agile Central. Customers who are using the former need to consider how the two are used together when moving to product-focused development.
- Broadcom has announced that CA's agile transformation services will be handled by its preferred service partner, HCL Technologies. The effect, if any, on the quality of these services remains to be seen.

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.

Prior to its acquisition by CollabNet, VersionOne led the market with a number of innovations, notably scaling support via enterprise agile frameworks and integration with DevOps pipelines. Since the acquisition, CollabNet VersionOne has focused investment in its VersionOne product on value stream management, templates for lean business cases and portfolio integration with TeamForge. 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.

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 enable companies to deploy value stream management.
- CollabNet VersionOne fully supports Scrum, Kanban, XP and SAFe methodologies and the Spotify model.
- CollabNet VersionOne has prebuilt integrations with, as well as orchestration support for, DevOps solutions, such as Jenkins, Chef and Selenium, through Continuum.

Cautions

- Although the VersionOne product has built-in scorecards, dashboards and reports — plus a report generator capability — some customers want greater flexibility in customization.
- Despite most reference customers for CollabNet VersionOne reporting ease of implementation, some indicated that its implementation training and materials could be improved.
- The VersionOne product will require investment in both product innovation and marketing execution to flourish under CollabNet VersionOne, which otherwise serves an adjacent market.

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 for product development or consulting engagements, when complete enterprise portfolio-level functionality is not essential.

Digité is a new entrant to this Magic Quadrant (it 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 rules for sorting cards, and visualizes developer workloads for managing deadlines. 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, 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 announced a new focus on marketing and media engagement to expand its reach.
- Through SwiftSync, Digité's products integrate with over 50 application life cycle management (ALM), CRM and DevOps tools, including Atlassian Jira, CA Agile Central, CollabNet VersionOne, Microsoft Azure DevOps and Slack.

Cautions

- Digité is not well-known outside India, but has partnered with Lean Kanban Inc. for training support.
- SwiftEASe provides a SAFe 4.5/4.6 solution and excellent support for dependencies across release trains, but with Digité's card-based look and feel.
- Digité's tools have evolved largely in support of Kanban service providers and product development companies, though they are also used in a variety of large and small enterprises.

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 is a new entrant to this Magic Quadrant. It offers a modern product that is well-integrated with Git. It offers solid support for teams doing Scrum- or Kanban-based development and 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's product offers strong collaboration support, including integration with Slack, Mattermost and others.
- GitLab's product roadmap reflects a strong vision for DevOps.

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 is new to this market and its product is only just beginning to fulfill its promise.

IBM

IBM is a Niche Player. Its EAP tool is IBM Rational Team Concert.

Consider IBM if: you are a large-enterprise customer using SAFe in a regulated industry.

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. IBM has a comprehensive suite of ADLM products covering the full life cycle.

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.

Cautions

- IBM Rational Team Concert's support for regulated, high-control environments may reduce its suitability for those seeking a highly flexible solution.
- IBM Rational Team Concert lacks the modern user experience features of some of its competitors.
- Of the reference customers surveyed for this Magic Quadrant, IBM's reported the lowest overall satisfaction with their vendor.

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. Inflectra's solution is well-suited to organizations looking for the ability to support traceability from requirements to tests. This includes organizations in regulated industries.

SpiraPlan is designed to be flexible in terms of approach — it supports Scrum and Kanban, as well as waterfall and hybrid approaches.

Strengths

- Inflectra is one of the few vendors in this market to offer support for compliance with several U.S. and European regulatory processes, as well as with International Organization for Standardization (ISO) standards.
- Inflectra offers an integrated ADLM approach. This makes it one of the few vendors with a focus on requirements and testing, which supports the traceability noted above.
- Inflectra offers strong integration with developer tools such as integrated development environments.

Cautions

- Although Inflectra SpiraPlan has strong traceability and formal-process support, it does not support SAFe.
- Inflectra SpiraPlan's portfolio functionality is very project-oriented. This makes it less suitable for organizations shifting to product-centric development.
- Of the reference customers surveyed for this Magic Quadrant, Inflectra's reported the lowest satisfaction with their vendor's ability to understand their needs.

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 in software quality and test management. ALM Octane is a good solution for organizations focused on supporting compliance and traceability.

Strengths

- Micro Focus' approach spans the full range of software development activities, from requirements through 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 company's focus on software quality. Unlike the majority of solutions, ALM Octane integrates testing capabilities.

Cautions

- Although reference customers are happy with the general direction of MicroFocus' product, they observe that it is still young and immature in areas such as reporting and metrics.
- Micro Focus' support for enterprise agile processes and portfolio support lag behind that of the Leaders in this Magic Quadrant.
- Because Micro Focus' products provide more than just agile planning capabilities, they carry a relatively high price tag. This extensiveness may also make them less appealing to organizations that have other tools in place for the other aspects of ADLM.

Microsoft

Microsoft is a Challenger. Its EAP tools are Azure DevOps Services and Azure DevOps Server.

Consider Microsoft if: you have a combination of agile and nonagile work or are looking primarily for a strong foundation for managing team-level work and collaboration.

Microsoft's approach involves offering a broad suite available on-premises or in the cloud, committed support for open-source technologies, and integration with leading open-source repository Git and DevOps tools. Azure Boards improves the overall usability of the products and their flexibility.

Strengths

- Microsoft offers social streams and work item history in Azure DevOps Services to improve collaboration between, and traceability for, developers.
- Microsoft's focus is on supporting the work of individuals on development teams. It therefore supports more than the 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 breadth 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.
- Customers choosing between Azure DevOps Services (cloud) and Azure DevOps Server (on-premises) should understand that new functionality is delivered to Azure DevOps Server customers typically three to six months after it is available in Azure DevOps Services.
- Microsoft does not support enterprise agile frameworks natively. Instead, it relies on partners for such support.

Panaya

Panaya is a Niche Player. Its EAP tool is Release Dynamix.

Consider Panaya if: you want a tool for agile delivery of an ERP solution.

A new entrant to this Magic Quadrant, Panaya brings strong ERP impact analysis capabilities to this market. Panaya is an established vendor in the enterprise agile testing market. Its entry into the EAP market offers a unique advantage for organizations customizing and extending enterprise solutions. In addition to basic EAP functionality, Panaya can use its impact analysis software to determine the impact of a software change. This capability enables Release Dynamix to inform development teams what tests need to be run or created in order to ensure the quality of a release.

Strengths

- Panaya's Release Dynamix provides a unique impact analysis of releases. This is made possible by Release Dynamix's focus on ERP and packaged software development.
- Panaya Release Dynamix supports static analysis of ERP customizations and extensions.
- Panaya Release Dynamix enables test management informed by the impact of a specific change.

Cautions

- Release Dynamix may not be appropriate for leading-edge agile practitioners. Panaya targets organizations that are using agile for ERP and packaged software customization. Most users of this software are at an early stage in their agile journey.
- Panaya's impact analysis feature currently supports only a limited number of ERP vendors and modules. Prospective customers must check that the product supports their most important work.
- Although Panaya's Release Dynamix can be used to plan any agile software development, it has little to distinguish it in this regard.

Planview

Planview is a Challenger. Its EAP software product is the Planview Lean and Agile delivery solution.

Consider Planview if: you are adopting agile in an organization with a strong and mature PPM practice.

Since acquiring LeanKit, Planview has made good progress merging the best-of-breed PPM and Kanban functionality of the two companies. This has resulted in an offering that has a powerful mixture of portfolio management and team-level work-tracking support. The solution supports organizations starting an agile journey by linking existing program and project support to agile teams, as well as strategic and product portfolios. It also supports the most advanced agile organizations with strong Scrum and Kanban support. 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 strong PPM support could become a crutch, one that impedes an organization's efforts to move to a product model.
- Planview's solution is complicated. It can require time to learn and use most effectively.
- There is still some tension evident in Planview's product between traditional project management and agile product development.

ServiceNow

ServiceNow is a Niche Player. Its EAP tool is the IT Business Management (ITBM) suite.

Consider ServiceNow if: you are a user of ServiceNow's Now Platform and want to branch into the planning, development and implementation stages of the software value stream.

A new entrant to this Magic Quadrant, ServiceNow brings nascent capabilities to this market. ServiceNow is an established vendor in the IT service management sector, where it provides infrastructure and operations organizations with leading solutions. Its entry into the enterprise agile planning market offers unique advantages for midsize enterprises customizing and extending enterprise solutions. At the time of evaluation, ServiceNow's SAFe support was limited to the Essential SAFe configuration. In addition to basic EAP functionality, ServiceNow has good integration with Jenkins.

Strengths

- ServiceNow's ITBM suite provides a broad set of functionality, including portfolio, financial, agile development, enterprise architecture and team capabilities.
- Organizations using ServiceNow's Now Platform will find that the ITBM suite is fully integrated with the Now Platform and that it integrates operational work with development work in a single, unified backlog.
- The ServiceNow ITBM suite provides good release-planning functionality, integrated with project and product portfolios.

Cautions

- ServiceNow's Scrum and Kanban support is still evolving, though the majority of essential features are for the most part supported. Notable exceptions are WIP limits and swim lanes in Kanban.
- The project portfolio functionality of ServiceNow's ITBM suite is not integrated with the team and program levels of SAFe and does not support Portfolio SAFe, Large Solution SAFe or Full SAFe. The ITBM suite does, however, provide Essential SAFe capability and may be appropriate for small-scale team-of-teams support.
- As ServiceNow's ITBM suite provides only basic EAP support, organizations 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 whose processes are subject to audit will find it appealing. Its SAFe support is evolving.

Strengths

- Siemens has a significant global presence. It can serve customers in any region.
- Siemens' solution is comprehensive, covering 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' scores from reference customers for support and service were lower than those for other vendors in this Magic Quadrant.
- Siemens' support for SAFe is currently limited to SAFe 4.0, whereas other vendors in this Magic Quadrant who support SAFe support version 4.5 or 4.6.
- Siemens' solution does not offer direct integration with any service desk tools, but does integrate with several such tools via Tasktop.

Targetprocess

Targetprocess is a Visionary. Its EAP tool is also called Targetprocess.

Consider Targetprocess if: you are looking to apply lean and agile techniques at any scale across your organization.

Targetprocess offers a flexible solution with support for Kanban- and Scrum-based practices. It will appeal to organizations getting started with, or maturing, their agile capability.

Targetprocess continues to grow and expand its product's capabilities.

Strengths

- Targetprocess provides very strong support for Kanban. It also supports Scrum and several enterprise agile frameworks, including SAFe. It can scale from team level to enterprise level.
- Targetprocess is very flexible and customizable, which makes it applicable to an entire organization — that is, both within and outside the IT department.
- Targetprocess has improved its integration capabilities. It received higher scores from reference customers for satisfaction with its ease of integration than did other vendors in this Magic Quadrant.

Cautions

- Targetprocess is a growing company, but remains small relative to its competitors.
- Reference customers reported that the flexibility of Targetprocess' product can make it harder to learn to use.
- Targetprocess' geographic coverage remains weaker than that of other vendors in this Magic Quadrant. It has a smaller presence in the U.S. than the Leaders have, and no staff or offices in Asia/Pacific. It is strongest in Europe, where it is headquartered.

TCS

TCS is a Niche Player. Its EAP tool is Jile.

Consider TCS if: you are considering adopting agile and want a low-cost SaaS solution, or if you work with TCS as a service provider.

Jile is a 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. So far, 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 department level or smaller.

Strengths

- TCS Jile's integrated support for persona development is helpful for a customer-centered approach to product planning.
- TCS focuses on the development of its vision and has a solid monthly release cadence.

- TCS offers value-based pricing at \$9 per user, per month.

Cautions

- Currently, TCS has few partnerships and integration options, compared with vendors of leading tools.
- TCS Jile is available only as a service and there is no on-premises option.
- TCS Jile's Kanban support is a new feature and less well-developed than others.

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

- Digité
- GitLab
- Panaya
- ServiceNow
- Siemens
- TCS

Dropped

- None

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 products.
- 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.
- 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 2018:
 - 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 WIP limits for Kanban
- In addition, the product(s) must offer 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 2018:
 - 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.
 - SAFe: The ability to plan and track work using the full three to four layer SAFe functionality. This use case does not cover Essential SAFe. The following SAFe artifacts must appear by name in the in product(s):
 - Release trains
 - Program increments
 - Value streams
 - Lean portfolio or solution trains

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
- DevFactory
- Favro
- Perforce
- Pivotal
- Scrumwise
- TechExcel

Evaluation Criteria

Ability to Execute

There are three key aspects to a vendor’s Ability to Execute: its product(s), its ability to convey a persuasive message, and 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 sizes of vendors, and in their growth rates, the frequency with which Gartner clients mention them, and the sizes of their user communities.

Of the Ability to Execute criteria rated as “high,” the most variation in scores is seen in Customer Experience. This makes it an important differentiating factor.

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓

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 2019)

Completeness of Vision

The key Completeness of Vision criteria are Market Understanding and Offering (Product) Strategy, which are therefore weighted as “high.” 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 vendor positions.

We also weighted the Innovation criterion as “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 as “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 own 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 2019)

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 shown from Gartner's client inquiry and survey data, as well as from their corresponding growth and market presence. Leaders are safe choices for large-scale adoption and we expect them to have a continued solid market presence. Leaders tend to have established marketplaces that provide them with extended functionality via partners. They also tend to 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 typically 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 both continue to grow and develop products with an ambitious vision. They may also be under threat from large competitors, should those competitors change their vision and product strategy. They will be attractive to organizations with mature enterprise agile practices who are looking to use agile as part of their 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 tools cover a much broader array of ADLM functions (requirements management, test management and so on), which leads to a stronger single platform when traceability and compliance are important. Evaluate tools against your use cases.
- **Select tools that suit the rest of your ADLM 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 happen 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

Agile adoption has traditionally been driven from the bottom up, and enterprise-class agile development is a natural evolution of project-level agile to support the needs of large-scale software management. Often, the needs of the agile teams themselves have differed from those of their management, which has led to the use of a variety of tools.

Top-down, strategic adoption of agile is now growing, however, driven by digital business initiatives that demand quick delivery of solutions to new types of problems. Top-down adoption is also being accelerated by growing client awareness of enterprise agile frameworks, although it should be noted that scaling of agile can happen in many different ways.

In 2018's edition of this Magic Quadrant, we noted that mergers and acquisitions, combined with the entry of new visionary players, were disrupting the EAP tool market. This trend is continuing. Vendors that have remained focused on legacy products are fading. Customers who are experiencing the reality of enterprise agile transformation are demanding tools that combine guidance and framework support with flexibility. Machine learning is proving difficult for some vendors to deliver, but remains a promising technology, especially as the volume of data available for analysis grows. We continue to expect that vendors will seek mergers, acquisitions and partnerships that enable them to provide solutions that meet the needs of all participants in the software development value stream.

Adoption and Decision Criteria

EAP software continues to serve a wide variety of end users, but team-level users are overtaking management-level users. Reference customer survey results show team-level roles, such as development team lead or Scrum Master (86% of installations), developer (84%), tester/QA (81%), and product owner (78%) are the most common. Management users are slightly less prevalent: product managers (77%), project managers (76%) and middle management (58%) are the most widely seen. Reference customers of Atlassian, Broadcom (CA Technologies), CollabNet VersionOne, Digité, IBM and Microsoft all report average user counts above 500 users per installation. AgileCraft, Micro Focus, Planview and Siemens have averages in the 400s, and other vendors range from about 150 to about 350.

Most (62%) of the reference customers surveyed have been using their EAP tool for less than three years. This is in contrast to last year's results, which saw over 50% with at least three years of use. This reflects the entry of new vendors into the market. Many agile technical practices, such as daily standups, backlog grooming, retrospectives and unit testing, are widely used by reference customers (over 75%). However, other practices long associated with agile, such as pair programming, refactoring and test-driven development, remain below 50% adoption.

Although changing the development culture remains the most prominent challenge to agile adoption (66% of reference customers reported it as a challenge), it is less prominent than last year (81%). The list of other significant challenges is similar to those seen in the past:

- Building consistent practices (63%)
- Working with teams using traditional development methods (60%)
- Training (44%)
- Expanding agile outside the developer core (42%)
- Implementing nonintrusive governance (41%)

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

- Coordinating teams (61%)
- Driving practice adoption (60%)
- Increasing product/project visibility (57%)
- Creating internal/external operational efficiencies (49%)
- Reducing time to market (46%)

Most organizations consider a number of tool providers when making their decision, although Atlassian is most frequently identified as under consideration, followed by CA, CollabNet VersionOne and Microsoft.

The dominant decision factors are product functionality and performance, but product roadmap and future vision also weigh heavily, as does overall cost.

Satisfaction

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

- Overall experience satisfaction scores ranged from a high of 5.0 to a low of 3.71, with an average of 4.41. This is almost identical to last year’s average of 4.44.
- Users rated the value they received slightly higher than in last year’s survey (an average of 4.18, versus 4.13 last year), with 4% dissatisfied and 14% neutral.
- Satisfaction with ease of integration using standard APIs and tools dropped significantly (an average of 3.89, versus 4.36 last year).
- Overall service and support satisfaction remained steady (an average of 4.45, versus 4.44 last year).

Acronym Key and Glossary Terms

ADLM	application development life cycle management
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ALM	application life cycle management
CI/CD	continuous integration/continuous delivery
DA	Disciplined Agile
DAD	Disciplined Agile Delivery
DSDM	dynamic systems development method
ISO	International Organization for Standardization
EAP	enterprise agile planning
ITBM	IT Business Management (ServiceNow)
KPI	key performance indicator
LeSS	Large-Scale Scrum
PPM	project portfolio management
SAFe	Scaled Agile Framework
WIP	work in progress
XP	Extreme Programming

Evidence

2018 Gartner Agile in the Enterprise Survey:

- This survey was conducted online from 20 June through 4 July 2018, among Gartner Research Circle Members — a Gartner-managed panel of IT and IT-business professionals.
- In total, 200 members participated, of which 88% 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 collaboratively 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 2018. 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 100 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.

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