Magic Quadrant for Enterprise Agile Planning Tools

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Increasing disruptions are driving a rise in the adoption rate of agile and enterprise agile planning tools. This Magic Quadrant evaluates 16 vendors of enterprise agile planning tools and the growing market to help applications and software engineering leaders make the right choice.

Market Definition/Description

Gartner defines enterprise agile planning (EAP) tools as products that enable organizations to scale their agile practices to support a holistic enterprise view. These tools act as a hub for the definition, planning and management of work. Just as agile is an evolution of development methodologies, EAP tools are an evolution of project/team-centric tools to support a business-outcome-driven approach to managing agile software development. This evolution is highlighted by the fact that several of these tools also offer project portfolio management (PPM) and strategic portfolio management (SPM) capabilities. Value stream mapping is gaining in popularity, and this is reflected in EAP vendors now supporting the convergence of functionality with value stream management platforms (VSMPs) and value stream delivery platforms (VSDPs). See our recommended reading at the end of this research for more information on these adjacent markets.

Enterprise agile is a steadily growing mainstream practice. Organizations adopting enterprise agile development are challenged to coordinate the work of multiple agile teams and adapt their governance and leadership processes to support agile methodologies. EAP tools help with this by providing increased visibility into the delivery of work.

EAP tools in this market address organizational needs by combining data from multiple sources to support the delivery of:

- Monthly, weekly and even daily incremental value delivery based on business outcomes

- Support for enterprise agile frameworks like Scaled Agile Framework (SAFe)

- Product roadmapping

- Increased visibility into the flow of work

- Management of work backlogs

- Collaboration capabilities for individuals and teams

- Management of cross-team dependencies

- Release planning and forecasting

- Visibility into the financial aspects of the work being done

Some Niche Players within this Magic Quadrant provide optional capabilities, which for them become product differentiators. These capabilities include:

- Support for regulatory compliance processes

- Requirements analysis and management

- Cyber-physical development support

Magic Quadrant

Source: Gartner (April 2021)

Vendor Strengths and Cautions

Atlassian

Atlassian is a Leader in this Magic Quadrant. Its EAP tool is Jira Align, which focuses on helping large organizations improve software delivery at scale by providing a full-featured solution with built-in support for multiple enterprise agile frameworks. Atlassian's operations are geographically diversified, and its Jira Align clients range from large to the very largest global enterprises. Atlassian announced in October 2020 a shift to the cloud (or a much higher-priced data center offering) for its Jira Software tool. While Jira Align has primarily been sold as a cloud-based solution, there is also an on-premises version for customers with regulatory requirements.

On 26 February 2021, Atlassian announced the acquisition of cloud-based data visualization and analytics provider Chartio, which Atlassian intends to integrate with the Jira family of products.

Strengths
- Atlassian has one of the largest installed bases globally with its team-level Jira Software tool, which integrates with Jira Align for project or product portfolio management.

- Atlassian's Jira Align provides end-to-end visibility, traceability and insight into the flow of all product delivery processes, tying that all back through the value stream for efficiency.

- Atlassian supports enterprises driving toward collaboration between business and technology, with a focus on measurable improvements in customer outcomes.

Cautions
- Atlassian's announcement to end sale of and support for its Jira Software on-premises server offerings — requiring customers to migrate to the cloud

or use the Data Center offering, which may be significantly more expensive depending on your installation — has met with significant market backlash. This adds complication for customers considering Jira Align to manage their project or product portfolios.

- Atlassian's Jira Align is a premium offering and is priced accordingly. The vendor provides four Jira Software Integrated seats free of charge for each Jira Align seat purchased. However, customers must also commit to at least a full year of using Jira Align.

- Jira Align has a modern user interface (UI), but it is extensive and complex, and it may take some time to optimize the Jira Align implementation in an organization. Atlassian requires Jira Align customers to purchase configuration and training services to get them started.

Broadcom

Broadcom is a Leader in this Magic Quadrant. Its Rally and Clarity products focus on enterprise-scaled agile (Rally) supported by portfolio planning and management capabilities (Clarity). Broadcom continues to enhance its strong product offerings with improvements in capex tracking capabilities and integration with third-party tools. Rally and Clarity both support board, grid (spreadsheet) and timeline views to support a common set of visualizations for planning, from teams to portfolios. Broadcom's operations are geographically diversified and its clients tend to be large enterprises.

Strengths
- Broadcom not only understands the market requirements, but is also providing thought leadership. This is exemplified by the BizOps Manifesto, of which Broadcom was a co-author.

- Broadcom offers strong support for SAFe, and is therefore a solid option for anyone using (or thinking of using) that framework. Broadcom is a Scaled Agile partner and the combined offering supports everything from lean portfolio management to team-level agile and DevOps.

- Broadcom's solution is competitively priced. Even with both Rally and Clarity subscriptions factored in, the solution matches the price of other leading EAP products. Rally also offers a fully featured starter edition for up to 50 users.

Cautions
- Broadcom focuses on large enterprises and, as such, the solution may be overwhelming for first-time users of an EAP tool. Small and midsize businesses may not have the time or resources to configure the tool to their needs.

- Broadcom Rally and Broadcom Clarity are separate products. Customers must assess which capabilities they require, as both are needed for full enterprise-scaled agile and portfolio planning and management.

- Broadcom Rally provides a free starter edition (up to 50 users), but Broadcom Clarity does not. Users looking to assess capabilities from both products will need to purchase Clarity to integrate with Rally.

Digital.ai

Digital.ai is a Leader in this Magic Quadrant. Its EAP tool, Digital.ai Agility, provides full support for enterprise agile frameworks such as SAFe, LeSS and DAD. It also provides strong visibility and insights into value streams. Since last year's merger of CollabNet VersionOne, XebiaLabs, Experitest, Numerify and Arxan Technologies to form Digital.ai, the vendor has made considerable improvements across its EAP tool capabilities and continues to be among the Leaders in the area of analytics, release forecasting, backlog management, risk management and predictability. Digital.ai has also expanded the Agility tool's native integration with many DevOps toolchains, and improved its collaboration capabilities. Digital.ai is a globally distributed company with a focus on large enterprise customers.

Strengths

- Digital.ai has a strong perspective on business agility and has executed well on its vision by combining innovations from leading platforms such as CollabNet VersionOne, XebiaLabs, Experitest, Arxan Technologies and Numerify. The Agility EAP tool has shown significant improvements in many capabilities in product roadmapping, program and portfolio tracking, and visibility into the value stream.

- Digital.ai provides a solid value stream platform with improved end-to-end visibility. It has expanded Agility's native integrations with many of the popular DevOps tools such as Azure DevOps, Chef, Jenkins, Atlassian Jira, ServiceNow and Selenium.

- Digital.ai's acquisition of Numerify has enabled it to add analytics and insights to the Agility platform. These capabilities provide visibility and metrics to help improve alignment between IT and business outcomes.

Cautions

- Digital.ai has grown significantly in the last 12 months due to the merging of five software organizations. Culture differences, resource alignment and product integration from the different companies may hinder the new entity's Ability to Execute on the strategy and product roadmap.

- Digital.ai Agility has extensive functionality, but proper implementation and customization often require considerable effort.

- Digital.ai falls short on its sales execution strategy and product marketing, as many clients fail to understand the vendor's value proposition compared with other EAP tool providers.

Digité

Digité is a Niche Player in this Magic Quadrant. Its SwiftKanban, SwiftEASe and SwiftEnterprise products are focused on providing support for SAFe with an emphasis on strong Kanban capabilities. Digité has a partnership with Lean Kanban and through it an association with David J. Anderson, one of the pioneers of the use of Kanban in software engineering. Digité is leveraging this partnership as a sales channel and its vision includes lean concepts such as visual work management. Its operations are mostly in India, though it is gaining customers in both the Americas and EMEA. Digité's clients are growing from its traditional base of service providers to include enterprise IT organizations.

Strengths

- Digité's geographic strategy has been successful, as evidenced by its growth outside of India.

- Digité's emphasis on lean and Kanban aligns well with the growth in the value stream management tools market.

- Digité's partnership with Lean Kanban provides access to a respected and influential authority in both the lean and Kanban practices.

Cautions

- Digité's Ability to Execute will depend on financial strength that it has not yet demonstrated.

- Digité's use of lean and Kanban may seem complex and unfamiliar to customers used to agile frameworks such as Scrum.

- Digité has not been very successful in communicating its vision or in influencing the market.

Favro

Favro is a Niche Player in this Magic Quadrant. Its EAP tool is also called Favro and is mainly focused on providing a flexible solution for enterprise-scale agile. Favro's flexibility supports different industry verticals, but it has found particular success within the SaaS and video gaming industries. This may be due in part to the user-friendly interface, which favors cards with configurable data fields and drag-and-drop functionality. Favro's customers are geographically diversified, with just over half of them located in EMEA and the

rest spread between the Americas and APAC.

Strengths

- Favro has a strong market understanding illustrated by its recognition of the need for business agility, hybrid ways of working, and enterprise-grade security and data governance for cloud tools. Favro also engages its user community and has an online system for submitting and upvoting feature requests.

- Favro's flexible card system supports many different use cases and this is reflected by its user base, which spans different industry verticals.

- Favro's integration with third-party tools is comprehensive, with out-of-the-box options to popular tools within the software development life cycle. Full flexibility is also provided with Favro's Webhooks and API, which allow for custom-made integrations to be built.

Cautions

- Favro's strong market understanding has not been paired with a diverse marketing strategy, which lacks variation and focuses mainly on social media. Favro does not have a partner network, did not attend any virtual conferences or events in the past year and does not have a reseller program.

- Favro has a small sales team and a bottom-up sales strategy that focuses on gaining traction at the team level with a free, two-week trial. Whether this strategy results in long-term growth or keeps Favro as a Niche Player remains to be seen.

- Favro's staff are predominantly located in EMEA, with limited staff in other geographies. This should be taken into consideration based on the level of direct support required.

GitLab

GitLab is a Leader in this Magic Quadrant. Its EAP tool is GitLab and is developed with an extensive user and contributor community. GitLab's solid Completeness of Vision and Ability to Execute support EAP from its experience in remote operations throughout the world. GitLab offers good support for organizations managing a product portfolio. It demonstrates good market understanding and is investing in its platform approach to tie together multiple tools in the value stream. GitLab's marketing strategy is well coordinated around communities, events and partners, with good sales and pricing strategy to assist its execution.

Strengths

- Gitlab's "all-remote" company philosophy has helped it continue operations seamlessly in 2020, as well as understand the new digital workplace that is upon us now.

- GitLab's community-based model provides amplification of its vision and strong technical support.

- Gitlab listens to its user base and responds to their feedback. This is demonstrated by Gitlab being selected as one of two vendors to receive the Gartner Peer Insights "Voice of the Customer" Customer Choice award in 2020.

Cautions

- Gitlab's sales strategy emphasizes community engagement and groundswell adoption. However, it has a less-defined direct enterprise sales strategy.

- GitLab's support of SAFe is very limited and users will struggle to implement and educate staff on its use without proper training partners. Limited change has been made in the product to accommodate the SAFe terminology and structures such as Agile Release Trains.

- GitLab has a large number of features, similar to other Leaders in this Magic Quadrant, that support legacy project-based features. This may lead to a complex tools experience to implement GitLab in an organization.

IBM

IBM is a Challenger in this Magic Quadrant. Its EAP tool is IBM Engineering Workflow Management, which is part of its Engineering Lifecycle Management (ELM) suite. IBM offers a wide range of products and services for product development. Its global presence and service arm enable it to serve customers in any region. IBM's enterprise agile strategy centers on providing a range of templates, including supporting SAFE at the enterprise level, with an emphasis on organizations building cyber-physical products or operating within regulated industries.

IBM provided limited support to our requests for supplemental information. Therefore, Gartner's analysis is complemented by credible and accepted public sources.

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

- IBM's commitment to the enterprise tool market is evident in its comprehensive suite of products covering the full product development life cycle.

- The vendor's extensive support and online documentation help onboarding and adoption.

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

- The tool lacks the modern user experience features of the market leaders. IBM is making investments to improve this.

- IBM Engineering Workflow Management is typically used as part of the ELM suite of tools and may be less valuable implemented separately.

Inflectra

Inflectra is a Niche Player. Its suite of products includes SpiraTest (team), SpiraTeam (project) and SpiraPlan (enterprise). Inflectra provides a solution for a regulated environment requiring traceability from requirements to tests. Inflectra appeals to regulated industries like healthcare, life sciences, finance, insurance, energy, and the industrial and public sectors. The software suite demonstrates improvements from last year in SAFe support, Kanban support and visibility into value streams.

Strengths
- Inflectra has had good growth in partnerships and works well with solution integrators across the globe. This has resulted in several large, new customers this year.

- SpiraPlan integrates with other tools in Inflectra's product suite, as well as other vendors to cover the different needs of testers, developers and managers. These integrations have enhanced Inflectra's visibility into the flow of work throughout the value stream.

- Inflectra stepped up its marketing efforts, despite the pandemic, by attending virtual shows and hosting online gatherings. It has built into its offerings several collaboration features and integration with different developer tools.

Cautions
- Inflectra's understanding of the EAP market does not encompass all the trends that Gartner sees developing. This may come from its focus on a niche set of regulated industries, testing and data security.

- The Inflectra product suite lacks advanced features in a few areas such as product roadmapping, Kanban and Scrum team support. The functionality

suits traditional project management organizations and is still evolving.

- Inflectra's solution is marketed toward the regulated industry and its adoption is low among the larger market of organizations delivering software products. The vendor may choose to focus on the regulated niche instead of broadening its solution to suit the larger market.

Micro Focus

Micro Focus is a Niche Player in this Magic Quadrant. Its ALM Octane and Project and Portfolio Management (PPM) tools are focused on providing a complete application development life cycle solution in conjunction with its quality assurance tools. The vendor's operations are geographically diversified and its clients tend to be larger organizations in industries that demand regulatory compliance and quality management traceability. Micro Focus has shifted its strategy and, as such, EAP is no longer a key area of investment.

Micro Focus provided limited support to our requests for supplemental information. Therefore, Gartner's analysis is complemented by credible and accepted public sources.

Strengths
- Micro Focus is a large, established vendor with the ability to serve the largest clients around the world.

- Micro Focus has a solid understanding of regulatory compliance and quality assurance in software engineering.

- Micro Focus provides support for both legacy and agile processes, which may appeal to customers working with hybrid methods.

Cautions
- Micro Focus does not have a vision for EAP that reflects the current trends described in the Market Overview section of this document.

- Micro Focus' EAP tools show their greatest strength when used in conjunction with the vendor's other tools. As a consequence, this requires a large commitment to the vendor from its customers, compared with other vendors in this Magic Quadrant.

- Micro Focus has shifted its strategy toward a focus on continuous quality and strategic portfolio governance capabilities, and as such has not emphasized EAP tools as a key area of investment.

Microsoft

Microsoft is a Challenger in this Magic Quadrant. Its EAP tool is Azure Boards, which is part of the Azure DevOps suite of development services oriented toward the Microsoft ecosystem. Azure Boards also integrates with GitHub Enterprise, giving GitHub developers an EAP alternative to the developer-focused Issues and Projects capabilities native to GitHub. Microsoft has indicated an intent to invest in agile planning tools directly within GitHub Enterprise, which may impact which tools deliver EAP functionality down the road. Microsoft is a global company with a strong presence across all geographies.

Microsoft provided limited support to our requests for supplemental information. Therefore, Gartner's analysis is complemented by credible and accepted public sources.

Strengths
- Microsoft is seen as a committed vendor in this market, with the ability to service customers throughout the world.

- Azure Boards leverages other products in the Azure DevOps suite to connect the planning aspects well with the whole "ideation to deployment" value stream for both Microsoft products and popular third-party tools. For example, a feature can be connected to code merges, the code build and deploy pipeline, and into Azure cloud instances.

- Azure Boards does a good job of agile-team-level work management, which

is rooted in the long-standing experience of Microsoft's support of the developer community. This history will play well into the next era of applying machine learning to large databases of EAP data.

Cautions

- Microsoft's EAP offering continues to undergo changes and there is uncertainty over which solution will prevail. Customers are still waiting for a clear strategy and consistent track record of EAP feature buildout. Until this is clarified further, some EAP competitors will have stronger positions.

- Microsoft is still building out the portfolio and enterprisewide features for oversight and governance currently being provided by third-party extensions or competitors.

- SAFe configuration is limited in Azure Boards. As such, customers may consider pairing other EAP tools with it to achieve better SAFe oversight and implementation.

Planisware

Planisware is a Niche Player in this Magic Quadrant. Its Planisware Enterprise and Planisware Orchestra tools are focused on a project and portfolio management (PPM)-based approach to enterprise-scale agile. Its operations are in both EMEA and North America, with a majority of its revenue from EMEA. Strategically, Planisware has successfully concentrated on expanding its customer base in the Americas. Though privately owned, the vendor shows solid financial strength. Planisware's product vision includes innovative approaches to funding, strategic planning and team coordination.

Strengths

- Planisware has achieved a very high level of customer retention while growing its customer base.

- Planisware has bolstered its partners and staff in the Americas in support of its growth in that region.

- Planisware combines an effective vision for EAP with a realistic strategy to evolve into it from its roots in PPM.

Cautions

- Planisware is a new participant in this Magic Quadrant, so Gartner has yet to see evidence that clients consider its track record as a PPM vendor applicable to EAP.

- Customers taking a product model or value stream approach to enterprise agile may find Planisware's PPM-based approach unfamiliar.

- Planisware has fewer integration capabilities with third-party tools compared with the Leaders in this Magic Quadrant. However, Planisware provides an open API for integrations and has a strong consulting capability to build needed integrations.

Planview

Planview is a Leader in this Magic Quadrant. Its EAP solution consists of two products: Planview Enterprise One and Planview LeanKit. Its operations are geographically diversified and its clients tend to be located in the Americas and EMEA regions. Planview's acquisition of Aptage, its own acquisition by private equity investors TPG Capital and TA Associates, and partnership with Tasktop are significant events setting the vendor up to be a strong competitor in this market going forward. Its acquisitions of Changepoint and Clarizen in 1Q21 add more PPM options. Planview's functionality has strong support for the remote collaboration and planning prevalent in 2020. In 2021, it plans to keep pace with other Leaders in this Magic Quadrant by increasing support for collaboration, objectives and key results (OKRs), product roadmapping and product-based dashboards.

Strengths

- Planview's EAP solution offers strong program, portfolio and SAFe support. The vendor is a good choice for organizations with differing degrees of agile

competency.

- Planview's acquisition of AI/ML firm Aptage has been integrated to provide predictive delivery risk assessments, something only a few other Leaders have done.

- Planview's acquisition by private equity investors TPG Capital and TA Associates this year has led to a solid backing of its mission for the foreseeable future.

Cautions

- With an aggressive roadmap for the year ahead and significant acquisition activity, Planview may risk some operational quality in the short term against other vendors in the Leaders quadrant.

- Planview supports public sector software acquisition models, but otherwise does not target its products to specific industries or verticals.

- Planview is diversifying its portfolio through mergers and acquisitions. This portfolio of products will require clients to evaluate their own software landscape to ensure they eliminate overlaps and avoid redundancy as they implement Planview.

ServiceNow

ServiceNow is a Leader in this Magic Quadrant. Its EAP tool is called IT Business Management (ITBM) and is built on the vendor's Now Platform. ServiceNow is an established vendor in the IT service management sector, where it provides organizations with leading solutions. Through acquisitions, it is also expanding its AI/ML capabilities. Its EAP product targets the midsize to very large enterprise markets. During the past year, it has continued to expand its support for SAFe and has extended its integration with third-party tools such as Azure Pipelines and GitLab. ServiceNow has operations worldwide.

Strengths

- ServiceNow ITBM is built on the Now Platform, providing integration of operation work with development work in a single unified backlog.

- ITBM provides a broad set of functionality, including idea management, roadmapping, project and program portfolio management, and visibility into the value stream.

- ITBM benefits from ServiceNow's extensive support and geographical presence.

Cautions

- ITBM's capabilities are part of the Now Platform, and may not have the same appeal to organizations with significant investments in other tools and platforms.

- ITBM's Scrum, Kanban and forecasting support is average, so ensure this level of functionality from ServiceNow meets your needs.

- Some clients report challenges with the initial configuration and customization of ServiceNow's EAP tool, and with the user interface and user experience.

Siemens

Siemens is a Challenger in this Magic Quadrant. Its EAP tool, Polarion, provides strong support for cyber-physical systems by bridging software delivery at scale with the tools used for a product's life cycle. The Polarion product is available in two offerings: Polarion ALM, as an on-premises version; and Polarion X, as the SaaS option. Polarion is well-suited for creating systems in a quality-sensitive, heavily regulated environment using agile methods. Organizations in regulated environments, and whose processes are subject to audit, will find Polarion appealing as it's a solution with an emphasis on quality engineering and traceability. Siemens has added to Polarion support for SAFe 5.0 and has improved many of its capabilities for the framework.

Strengths

- Siemens has a strong vision to support complex products in complex environments, especially for cyber-physical and embedded systems. Its digital twin capability will allow organizations to create a digital representation of their environments and enable them to model, plan and simulate.

- Siemens has significant support for regulated environments with strict quality and safety requirements.

- Siemens bridges the gap between tools used for physical product life cycles and software delivery toolchains, enabling collaborative work and visibility across both domains.

Cautions
- Siemens' strategic focus on cyber-physical and regulated environments may reduce its innovation in other areas of software delivery.

- The Polarion product lacks advanced features in several areas such as product roadmapping, Kanban and Scrum team support.

- Siemens' marketing campaigns continue to focus on specific industry sectors, which impacts adoption among organizations focused solely on software products.

Targetprocess

Targetprocess is a Leader in this Magic Quadrant. Its EAP tool, also called Targetprocess, allows organizations to drive lean and agile development at scale. Targetprocess is a steadily growing company at about 10% annually, but slower growing and smaller relative to its leading competitors. Targetprocess focuses its marketing on midsize and large companies, largely through direct sales, although Accenture is a key partner.

On 11 February 2021, Apptio announced the completion of its acquisition of Targetprocess and its intent to integrate the Apptio technology business management (TBM) capability with Targetprocess's support for enterprise agile frameworks.

Strengths
- Targetprocess offers its solution for private, public or vendor-hosted cloud and provides strong support for remote workers through collaboration tools. Targetprocess is a highly innovative company with leading support for product roadmapping, OKRs, an automation rule engine and many native integrations with other tools and platforms. Targetprocess also provides strong value stream/opex support for financial management.

- Targetprocess delivers excellent visualization for both project and product portfolio management. It will appeal to organizations getting started with, or maturing, their agile capabilities and anticipating a shift from project-based to product-based practices. Targetprocess can deliver its portfolio, product and program management capabilities on top of Atlassian Jira Software and Microsoft Azure DevOps team-level solutions.

- Targetprocess supports scaling frameworks such as SAFe, Scrum of Scrums, Disciplined Agile, LeSS, Nexus, Spotify and, notably, hybrid scaling frameworks. Targetprocess has solid integration capabilities, supporting both native and tool-enabled integrations with DevOps pipeline tools.

Cautions
- Targetprocess's geographic coverage is weaker than that of other leaders in this Magic Quadrant. It lacks a global sales strategy and has a much smaller presence in the U.S. than the other Leaders. It also has no coverage in Asia. Most of its employees are based in Europe. Targetprocess's sales strategy is primarily direct, which limits its sales presence. The company intends to increase its use of channel sales.

- Targetprocess, despite excellent support for capex/opex tracking, has only above-average support for release and Epic-based forecasts — and no AI/ML capability or Monte Carlo simulation, as several of the Leaders offer. This is an area for Targetprocess to improve.

- Targetprocess continues to deliver product innovation at a reasonable price. However, it has not successfully built brand awareness in this space. Partnering with Accenture may help raise its visibility, but for many buyers, Targetprocess is under the radar when compared with other vendors in the Leaders quadrant.

TCS

TCS is a Niche Player in this Magic Quadrant. Its EAP tool is Jile, which is mainly focused on enabling agile transformations. Jile supports those adopting agile or scaling agile who want a value-priced SaaS solution. TCS Jile's operations are mainly APAC focused and its largest installed base is in EMEA. Usage tends to be at specific divisions, regions or business units, and in some cases, companywide. TCS's product roadmap for Jile is ambitious, encompassing enhanced portfolio management, Jile marketplace, Jile community and the incorporation of cognitive and other AI technologies.

Strengths

- TCS offers a competitively priced product for the level of features that Jile provides. This may be ideal for clients operating on a budget and not looking to invest heavily in their EAP solution.

- TCS continues to expand its third-party partnerships and integration options through the marketplace. The TCS Jile marketplace offers plug-ins for integration with continuous integration/continuous delivery (CI/CD), testing tools, DevOps tools and utilities.

- TCS has partnered with Kovair to build APIs for Jira and ServiceNow, has integration with GitHub and plans many more integrations in the future.

Cautions

- Jile is available only as a service. There is no on-premises option. It is a simple, value-priced tool sold over the web and through direct sales with a marketplace for supplementary apps available only as SaaS products.

- Jile's portfolio-level functionality is limited compared with that of the EAP tools of Leaders in this Magic Quadrant.

- TCS Jile's web marketing and social media presence — together with tradeshows (when they resume), communities, webinars and online sales — have not yet raised awareness much beyond its focus in TCS engagements in APAC and EMEA. However, there has been progress in the past year in this area.

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.

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Added

- Planisware

Dropped

- **Blueprint —** Blueprint originally declined to participate in this Magic

Quadrant. Upon further investigation, we discovered that although its underlying platform still supports EAP, the company focus has shifted toward robotic process automation (RPA).

Inclusion and Exclusion Criteria

Gartner's Magic Quadrant research identifies and analyzes the most relevant providers and their products in a market. Gartner uses, by default, an upper limit of 20 providers to support the identification of the most relevant providers in a market.

To qualify for inclusion, each vendor needed to meet the following criteria:

- The vendor must have at least two customers with 500 or more licensed, paid users of at least one of the products.

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

- The vendor must provide services including support and training for, as well as implementation of, the products.

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

- The product(s) must be provided to the customer 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 must demonstrate during the Magic Quadrant process. These use cases need to be offered and actively marketed (via the vendor's website, white papers, etc.) as of 20 October 2020:

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

  - **Single lean/Kanban team:** 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, feature).

    - Tracking of work in progress (WIP) on either a Scrum or Kanban board.

    - Track and visualize metrics using burndown/burnup charts for Scrum.

    - Calculate 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 must demonstrate during the Magic Quadrant process. These use cases need to be offered and actively marketed (via the vendor's website, white papers, etc.) as of 20 October 2020:

  - **Product portfolio:** The EAP tool is used to plan and track an organizational group made up of two to nine teams assigned long term to a single product line or family.

  - **Project and program portfolio:** The EAP 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 Portfolio SAFe as documented in SAFe version 5.0 This use case does not cover essential SAFe. The following SAFe artifacts must appear by name in the product:

    - Release trains

    - Program increments

- Value streams

- Lean portfolio

Honorable Mention

Vendors may have had strong enterprise-level capabilities such as product and roadmapping functionality, but failed to meet the required inclusion criteria for this Magic Quadrant. We will continue to evaluate the following vendor, which may justify inclusion in your evaluation process now or in the future:

- Agile Cockpit — Agile Cockpit provides an EAP tool also called Agile Cockpit. It is a low-cost, on-premises or SaaS solution with support for Scrum, Kanban and SAFe. Agile Cockpit's customer base is mostly in India. The vendor did not qualify for this Magic Quadrant as its product does not have at least two customers with 500 or more licensed, paid users and at least one customer with 10,000 licensed, paid users.

There is a large number of team productivity SaaS tools available in the market with basic Kanban and Scrum functionality. These low-cost tools do not provide full coverage of the critical capabilities and enabled use cases. We will continue to evaluate these tools to see if they meet the inclusion criteria to be added into this Magic Quadrant in future editions.

Evaluation Criteria

Ability to Execute

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

1. Its product(s).

2. The viability of the company or product group.

3. Its ability to convey a persuasive message.

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.

This year, we have decreased the weighting of customer experience as we have less data to guide our ratings. Instead, we have emphasized the product and enterprise viability relative to other vendors in the market (see Table 1).

Table 1: Ability to Execute Evaluation Criteria

Enlarge Table ⬏

Evaluation Criteria ↓	Weighting ↓
Product or Service	High
Overall Viability	High
Sales Execution/Pricing	Medium

Evaluation Criteria	Weighting
Market Responsiveness/Record	Medium
Marketing Execution	High
Customer Experience	Low
Operations	Low

Source: Gartner (April 2021)

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. This is key to remaining a Leader in this market. 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

Enlarge Table

Evaluation Criteria	Weighting
Market Understanding	High
Marketing Strategy	Medium
Sales Strategy	Medium
Offering (Product) Strategy	High

Evaluation Criteria ↓	Weighting ↓
Business Model	Medium
Vertical/Industry Strategy	Low
Innovation	High
Geographic Strategy	Low

Source: Gartner (April 2021)

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 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.

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, DevOps and value stream 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 value stream toolchain. Having good integration with your tools will provide increased ability to govern and optimize your entire value stream. Alternatively, be prepared to purchase additional tools to provide integration. The value stream concept is increasing in popularity. Further information can be found in Market Guide for DevOps Value Stream Delivery Platforms and Market Guide for DevOps Value Stream Management Platforms.

■ 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. Leverage any provided templates and guides to ease out-of-the-box use.

■ Many organizations have more than one EAP product in use. This may be because of the different needs of various lines of business, because of a hybrid methodology 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.

■ We see enterprises increasingly adopting agile practices throughout the entire enterprise, not just inside of IT. EAP 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 capabilities and products not covered in this Magic Quadrant.

Market Overview

The enterprise agile planning (EAP) market has seen strong growth over the past year with a continuing group of market leaders. The COVID-19 pandemic has driven many IT leaders to seek out better organizational adaptability, oversight of the remote workforce and cost efficiencies. As a result, they have reached for agile, DevOps and value stream methodologies and thus are looking for EAP tools. In addition, with data and analytics providing a much better ability to assess the delivery of value to customers, and digital giants disrupting long existing businesses, we are seeing greater adoption of the product model. The product model helps bridge the business-to-IT gap and instills a culture of learning and customer focus.

We see certain trends driving the 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]

■ IT leaders are increasingly looking to optimize their overall concept to cash software development life cycle or development value stream. EAP tools are responding to provide better visibility and interconnections to all the tools along the value stream. These include ideation, roadmapping, agile planning and management, testing, packaging, release and monitoring. Connecting these tools also provides direct feedback loops at each level and is beginning to expose true customer value realization feedback.

■ The COVID-19 pandemic has driven many IT organizations to work remotely. As a result, the EAP market has responded with increased collaboration capabilities. Some EAP tools support these functions natively, while others interface to leading industry tools in email, instant messaging and virtual whiteboarding.

■ Experience with enterprise agile methodologies — such as the Scaled Agile Framework (SAFe), Large-Scale Scrum (LeSS) and Disciplined Agile (DA) — is growing. Several vendors provide support for multiple models. SAFe has

especially seen significant improvement in its support across EAP tools. Many EAP tools support SAFe with terminology, templates and collaboration mechanisms such as PI planning boards.

- The first signs of artificial intelligence (AI) and machine learning (ML) are being deployed in a few EAP tools. AI/ML is primarily being applied to forecasting delivery for epics and stories based on historical information in the EAP tool.

- Adoption of objectives and key results (OKRs) as a mechanism for setting strategy and tracking execution has increased. Several tools have begun supporting management of OKRs for agile enterprises. The tracking of OKRs is the feedback loop connecting delivery of customer value back into product strategy and prioritization.

- Atlassian announced in October 2020 a shift to the cloud, requiring customers to migrate to the cloud or use the Jira Software Data Center offering, which may be significantly more expensive depending on the installation. This strategy has impacted many clients in the market. Customers are considering alternatives, especially if they have security or regulations that lead them to choose on-premises software solutions.

- 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.

- A group of vendors is forming around the cyber-physical development life cycle, including IBM, Inflectra, Micro Focus and Siemens. A cyber-physical system is a computer system in which a mechanism is controlled or monitored by computer-based algorithms.This developing market is more evidence of the continued inroads that agile is making in traditional businesses, especially those that are tied to physical entities such as chemical processes and assembly lines. Due to the high risks involved in failure of these cyber-physical systems, there is increased need for EAP tools to support compliance and auditing.

- 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.

As agile spreads beyond the individual Scrum team, the value stream concept is the unifying theme that many EAP vendors are leaning toward. With the EAP tool at the center of this value stream, there are many other tools along this stream. Many of the leading vendors in this EAP Magic Quadrant are investing heavily to provide a single solution to manage the entire value stream for modern digital enterprises. Gartner has several Magic Quadrants and Market Guides that advise clients on the various tools in this space. In the near future, we envision a consolidation of these markets into fewer unifying markets.

Here's a description of the adjacent markets:

- Traditional project and portfolio management (PPM) tools provide the high-level planning and resource management that enterprises demand. These have evolved into strategic portfolio management (SPM) tools, which Gartner defines as a set of business capabilities, processes and supporting portfolio management technology required for successful digital business transformation and scaling. These SPM tools may lack enterprise-class agile development support. Also, EAP tools may not support project management outside agile frameworks (Gartner has a separate Magic Quadrant for Strategic Portfolio Management).

- 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).

- The increased interest in the unifying theme of value streams brings two new markets into adjacency with EAP tools. Value stream management platforms (VSMPs) enable organizations to optimize end-to-end product delivery lead time (see Market Guide for DevOps Value Stream Management Platforms). Value stream delivery platforms (VSDPs) provide a fully integrated set of capabilities to enable continuous delivery of software. These capabilities may include project or product planning, build automation, continuous integration, test automation, continuous deployment and rollback, release orchestration, and automated security policy enforcement. They may also provide visibility into key value stream metrics (see Market Guide for DevOps Value Stream Delivery Platforms). These new value stream-based tools evolved from DevOps and CI/CD automation concepts and primarily focus on managing and optimizing the development value stream. By contrast, EAP tools evolve from the center of agile work management for the enterprise and are extending the management of work beyond previous boundaries into the whole value stream. Although many EAP tool vendors are going in this direction, it's unclear how these three markets will evolve and potentially merge in the next few years.

Evidence

[1] Gartner Agile in the Enterprise Survey 2019:

- Gartner's Agile in the Enterprise Survey was conducted via an online survey from 3 June through 25 June 2019, with 130 Gartner Research Circle Members — a Gartner-managed panel composed of IT and IT-business professionals.

- Qualified participants included business end users with either an IT or IT-business focus as a primary role. Eighty-seven percent of qualified participants use agile for at least some of their application development.

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

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.