

# Magic Quadrant for Enterprise Agile Planning Tools

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The increased need for IT adaptability is driving a rise in the adoption rate of agile and enterprise agile planning tools. This Magic Quadrant evaluates 17 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 product delivery at scale. 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 streams are emerging as a popular way to optimize delivery from agile/DevOps teams. This is reflected in EAP vendors now supporting the value stream construct and the convergence of functionality with value stream management platforms (VSMPs) and value stream delivery platforms (VSDPs).

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 combine data from multiple sources to enable:

- Monthly, weekly and even daily incremental value delivery based on business outcomes
- Support for enterprise agile frameworks like Scaled Agile Framework (SAFe)
- Product roadmapping
- Management of strategy, investments and objectives
- 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 become product differentiators for them. These capabilities include:

- Support for regulatory compliance processes
- Requirements analysis and management
- Cyber-physical product development support

# Magic Quadrant

Figure 1: Magic Quadrant for Enterprise Agile Planning Tools

Source: Gartner (April 2022)



## Vendor Strengths and Cautions

### Apptio

Apptio is a Leader in this Magic Quadrant. Its EAP tool, Targetprocess, enables organizations to drive lean and agile development at scale. Apptio offers its solution for private, public or vendor-hosted clouds, and provides strong support for remote workers through collaboration tools. Targetprocess joins Cloudability and ApptioOne in the Apptio product line, previously focused solely on optimizing financial management, to link enterprise strategic objectives with business outcomes.

### Strengths

Source: <https://www.gartner.com/doc/reprints?id=1-29T8617I&ct=220422&st=sb>

- **Financial Management:** Apptio is an innovative financial product company with leading support in Targetprocess for both digital and hybrid portfolios, product roadmapping, objectives and key results (OKRs), investment and strategy dashboards, and budget tracking. Apptio's Targetprocess provides exceptionally strong value stream and capital expenditure (capex)/operating expenditure (opex) support for financial management and for lean portfolio management in SAFe.
- **Sales Growth:** The Apptio sales organization targets the top 20,000 global organizations, existing Apptio customers, Cloudability customers and midmarket organizations. Apptio markets Targetprocess to agilists and agile project management offices (PMOs) in midsize and large companies, and sells primarily direct, although expanding partner revenue is approaching 50% globally. Apptio is a steadily growing company with double digit year-over-year growth in customer acquisition, with more dramatic revenue growth due to an increased focus on larger customers.
- **Scaling Agile:** Through Targetprocess, Apptio supports organizations adopting lean-agile scaling frameworks such as SAFe, Scrum of Scrums, Disciplined Agile, LeSS, Nexus and hybrid scaling frameworks. Targetprocess has solid integration capabilities, more than 70 connectors, and bidirectional auto sync with Atlassian Jira Software and Microsoft Azure DevOps (ADO), supporting both native and tool-enabled integrations with DevOps pipeline tools.

#### Cautions

- **Technology Innovation:** Apptio's solution strategy has favored integration of Targetprocess with its financial capability over introducing features like artificial intelligence (AI)/machine learning (ML), or Monte Carlo simulation. Notably, several Leaders in this Magic Quadrant offer (and customers have come to expect) this type of innovation from leaders in this market. This is an area for Apptio to address.
- **Targetprocess Pricing:** Despite attractive pricing when compared with competing EAP tools from Atlassian, Broadcom and ServiceNow, Apptio has no third government General Services Administration (GSA) pricing schedule for Targetprocess, limiting access for some federal customers.
- **Asian Markets:** Despite a significant local sales presence in Asia/Pacific, the region accounts for only 4% of Apptio's customer base. There is a Japanese language version of Targetprocess, but nothing for the Chinese market.

#### **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 largest global enterprises. While Jira Align has primarily been sold as a cloud-based solution, there is also an on-premises version for customers with regulatory requirements. Atlassian continues to integrate visualization and analytics functionality into its products from the Chartio platform acquired last year.

## Strengths

- **Market Understanding:** Atlassian continues to support enterprises that seek to optimize for outcomes and drive alignment between business and technology, while dealing with disruptions such as COVID-19, new ways of working and new cloud-native technologies. Atlassian is also investing in a third-party-first strategy to support its open toolchain concept and help organizations with challenges caused by DevOps tools fragmentation.
- **Sales Execution:** 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.
- **Product Strategy:** Atlassian's Jira Align provides a platform to optimize value delivery through end-to-end visibility, collaboration, traceability and insight into the flow of all product delivery processes, tying that all back through the value stream for efficiency.

## Cautions

- **Product Offerings:** Some reference customers are unhappy with the lack of integration between Jira Align and Confluence, especially as they are used to the seamless integration with Jira Software and Confluence.
- **Implementation Challenges:** Customers report implementation challenges due to the complexity of configuration and the requirement for training services to get started. Atlassian does provide a Jira Align implementation jump-start offering at a one-time charge of \$39,000.
- **Cloud Migration:** Customers are still unhappy with the end of support for Jira Software on-premises server offerings, requiring customers to migrate to the cloud or use the Data Center offering, which is significantly more expensive.

## **Bee360**

Bee360 (previously Clausmark) is a Niche Player in this Magic Quadrant. Its EAP product is called Bee360 Enterprise Agile Planning. Bee360's main operations are in EMEA, and it has a service center in Asia/Pacific, supporting clients worldwide. The majority of clients are in the manufacturing, financial and energy sectors. Bee360's roadmap focuses on improving process and product management capabilities and integration with DevOps toolchains.

## Strengths

- **Holistic Insights for Business and IT Roles:** Bee360 provides insights to business and IT roles on IT strategy and demand management, project execution, governance and budgeting in support of what the vendor calls "holistic IT management."
- **Invested in Improving Collaboration:** Bee360 has invested in integration with communication tools such as Atlassian Confluence and Microsoft Teams to improve team collaboration activities.

- Attention to Customer Experience: Bee360 includes dedicated training to reduce the learning and adoption time of the product and its features. It offers multilanguage support with dedicated customer experience resources.

#### Cautions

- Marketing and Product Strategy: Bee360's main focus is on supporting clients to maximize value from IT, not specifically product delivery. It has more clients in business roles than IT roles, as its focus is on providing a lightweight platform. This approach misaligns with what other EAP tools vendors bring to this market.
- Sales Execution: Bee360 is a small company that is mostly based in Europe. As the implementation requires consulting services from the vendor, it brings risks of capacity and responsiveness to support client engagements.
- Consulting Services Are Integral to the Offering: Bee360 offers consulting services inextricably linked with the product offering, which can become an overhead. Therefore, it may not be suited for organizations that are simply looking for a tool.

#### **Broadcom**

Broadcom is a Leader in this Magic Quadrant. The enterprise agile planning capabilities are provided by two of its applications — Rally and Clarity — working in conjunction. These products focus on enterprise-scale agile (Rally) supported by portfolio planning and management capabilities (Clarity). Broadcom's operations are geographically diversified, and its clients tend to be large enterprises. Broadcom continues to enhance its product offerings with a focus on creating a "ValueOps" platform by integrating its Rally and Clarity products.

#### Strengths

- Market Strategy: Broadcom has continued to support this market with participation and community support via webinars, summits and learning materials. This depth of involvement extends to its roadmap, where the vendor engages with customers on future features and provides a regular release cadence of new functionality.
- Framework Support: Support for SAFe continues to be one of Broadcom's strengths. As a Scaled Agile partner, the combined offering supports everything from lean portfolio management to team-level agile and DevOps.
- Global Partnerships: Broadcom offers a global support solution, with a partner network that can support both initial installation and expanding use of its products to other teams in the organization.

#### Cautions

- Complex Implementation: Clarity and Rally have a wealth of features that require careful implementation plans to overcome the complexity of choice.

- Portfolio and Funding Functionality Main Focus: Broadcom's ValueOps product strategy is focused on filling gaps in its support for funding/planning execution. This strengthens current functionality at the expense of investing in capabilities such as AI, ML or robotic process automation (RPA) that would make Broadcom's offerings more competitive in the long term.
- Licensing Differences: Both Rally and Clarity are required to support this market. Pricing options of the applications vary. Clarity continues to require a minimum license spend where Rally supports an initial free version for the first 50 users.

## **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. Its operations are global and geographically diversified, with the largest customer base in the Americas. Its target customers are large, global 5000 companies. Digital.ai is heavily investing to evolve its AI/ML-powered value stream delivery and management platforms to help businesses with customer-facing products meet their business objectives and improve value delivery.

### Strengths

- Market Understanding: Digital.ai provides a scalable platform that provides end-to-end visibility across value streams and enables cross-functional teams to collaborate, innovate and improve value delivery from concept to cash.
- Innovation: The Digital.ai platform provides analytics across multiple phases of delivery and leverages AI/ML to derive insights. This helps organizations make data-driven decisions to improve value delivery flow and stay on course with business strategy.
- Established Vendor: Digital.ai is a well-established vendor and continues to build on a unified value stream platform by combining five leading software companies merged in the last two years including CollabNet VersionOne.

### Cautions

- Product Complexity: Digital.ai Agility has extensive functionality, but proper implementation and customization often require considerable effort and training.
- Sales Execution and Product Marketing: Digital.ai has combined five software organizations and created a unified product line, but customers still struggle to understand the vendor's value proposition compared with other EAP tool providers. Many still inquire about old product tools from XebiaLabs and CollabNet.
- Geographic Strategy: Digital.ai Agility has limited local support in Asia/Pacific with only a handful of offices and partners. The tool is also not localized for Asia/Pacific languages.

## **Digité**



Digité is a Niche Player in this Magic Quadrant. Its SwiftKanban, SwiftEASe and SwiftEnterprise products are mainly focused on providing support for SAFe with an emphasis on strong Kanban capabilities. Its operations are mostly focused in India, and its clients tend to be service providers and enterprise IT organizations. Digité plans to add more project and portfolio management, financial management, and resource management capabilities to its products. Digité also aims to improve its products' usability and collaboration features.

### Strengths

- **Innovative use of AI/ML:** Digité has incorporated AI/ML into its chat-based user interface, allowing for natural language search and navigation. The use of AI/ML in its scenario planning capability helps to identify and potentially mitigate risks.
- **Lean and Kanban:** Digité's strength in Lean and Kanban is well-aligned with industry practices based on value stream management. Digité has a partnership with Kanban University that provides access to a respected and influential authority in Kanban practices.
- **Portfolio Management Strategy:** Digité's increased emphasis on portfolio management and related features should help it appeal to a wider audience. It will also help to meet the needs of customers working in a mix of project- and product-based ways.

### Cautions

- **Financial Strength and Growth:** Digité has not yet demonstrated the financial strength it will need to execute on its strategy. Digité's growth in terms of new customers does not align with its revenue growth targets.
- **User Experience:** Digité's solution combines multiple products, each with a slightly different user experience, which makes the overall customer experience inconsistent. Many of Digité's product features make heavy use of Kanban, which may make them complex and unfamiliar to some customers.
- **Complex Setup:** Both Digité and its customers report that the implementation of Digité's products, though generally successful, can be complex and lengthy.

## **Enalean**

Enalean is a Niche Player in this Magic Quadrant. Its open-source EAP tool, Tuleap, targets digital product delivery with support for end-to-end traceability. Enalean supports collaboration and control over the application product life cycle. Deployed as a cloud or on-premises solution, Tuleap is fully in compliance with European regulations, including GDPR, and ISO certification. Enalean is a privately held company based in France; 86% of Tuleap customers are in Europe.

### Strengths

- **Cyber-Physical Focus:** Among its capabilities, Enalean is focused on cyber-physical systems and supports regulatory compliance and traceability.

- **Competitively Priced:** Tuleap is competitively priced and has installations ranging up to several thousand users. It may be a viable option for midsize and smaller enterprises or as a tool for use in business roles such as finance or marketing. The availability of both a free and commercial open-source edition further simplifies customer adoption, making it easy to opt in for enterprise support and other features available in the commercial version.
- **Product-Oriented:** Enalean sees itself and its Tuleap solution as more product-development-oriented than IT-oriented. Tuleap may also be applied to business uses such as planning for marketing events, agile business planning or citizen development.

### Cautions

- **Third-Party Integration:** Enalean offers a limited set of third-party native integrations, unlike other vendors in this market. The limited number of integrations impedes Enalean's ability to provide visibility to the complete software development value stream.
- **Partner Networks:** Enalean has a limited partner network that drives 20% of sales in Europe, 5% in the Americas and 5% in APAC. While Enalean has 20 partners in Europe, there are only two in the Americas and one in APAC. To ensure viability, Enalean must expand this network.
- **Low Market Visibility:** Enalean lacks the market visibility it would like and plans investment to increase global awareness through partnerships in APAC and the Americas, social media presence, and industry tradeshows, conferences and other marketing events.

### **Favro**

Favro is a Niche Player in this Magic Quadrant. The Favro tool is a flexible, card-based solution for enterprise-scale agile. Its operations are geographically diversified, and its clients tend to be within the SaaS and video gaming industries. Favro continues to invest heavily in mobile capabilities to accompany its SaaS offerings to bring "a truly mobile experience" to the digital workplace.

### Strengths

- **User Interface:** Favro's flexibility and user-friendly interface ease adoption within its chosen industry verticals, appealing to both gamer and application users with its high use of images and graphics.
- **Customer Support:** Favro's support is customer focused, with favorable customer feedback on its support team and engagement with its user community. The engagement extends to its own product roadmap, which is enhanced by an online system for submitting and upvoting feature requests.
- **Third-Party Integrations:** Implementing Favro into existing application suites is made easier through its out-of-the-box integration with third-party tools. Full flexibility is also provided with Favro's Webhooks and API, which allow customers or partners to build custom integrations.

## Cautions

- **Limited Market Penetration:** Favro has a bottom-up sales strategy that focuses on gaining traction at the team level with a free, two-week trial. Recently, Favro raised funding from venture capitalists to expand its sales and marketing operations, but results are still to be proven.
- **Unproven Sales and Marketing Support:** Favro's investment in its Lithuanian subsidiary to support its sales and marketing strategy is yet unproven. The initial focus of this team is on Favro's core target industries.
- **Limited Investment in the Company:** Favro's new investors are strong venture capital brands in northern Europe. However, these are relatively small, early-stage investments, and Favro lacks the financial muscle of many of the other companies in this Magic Quadrant.

## GitLab

GitLab is a Challenger in this Magic Quadrant. Its EAP tool, GitLab, is mainly focused on providing end-to-end visibility to the software development value stream, the software development life cycle and collaboration among stakeholders. Its operations are geographically diversified. Clients tend to be DevOps practitioners, many of whom contribute to the product's codebase, because it also provides DevOps automation functionality. GitLab's integration ability with other tools has been one of its key features, and the vendor continues to focus on growth with inputs from its user community.

## Strengths

- **Easy to Start:** GitLab provides clear pricing and easy onboarding for new customers to deploy its tools in self-managed or SaaS configurations. While it supports many methodologies, it is primarily focused on the value delivery aspects for agile teams.
- **Leveraging Connections:** The marketing strategy is seeing results from GitLab's alliances and partners. GitLab is also leveraging its established users and communities, who tend to favor open-source-based solutions.
- **Responsive in Execution:** GitLab offers features in value stream delivery and to enhance delivery efficiency. The vendor has been quick to introduce small features to address different transformation needs in various stages of working, team forming, visibility, values and outcomes.

## Cautions

- **Market Functionality Disconnect:** Despite reported positive experiences from users with the current DevOps platform focus, GitLab has yet to fully support the market trends of software product portfolio management, portfolio financial management, strategic alignment and tracking, and enterprise agile frameworks, including SAFe. However, the product can be configured to meet several of these use cases. Customers need to determine if GitLab's feature set and direction match their needs.

- **Developer-Centric Experience:** GitLab's simple user interface focuses heavily on the efficiency of software delivery, with limited insight to product delivery of business value. The interface lacks a rich visual oversight of financial investment and business outcomes.
- **Marketing and Growth:** Recent marketing pushes and customer lead innovation continues to align to GitLab's jump-start DevOps platform focus. GitLab has taken a different approach from other EAP vendors, which may limit growth into businesses with incumbent EAP solutions.

## **IBM**

IBM is a Challenger in this Magic Quadrant. Its EAP products include Engineering Workflow Management, part of its Engineering Lifecycle Management (ELM) suite, and UrbanCode Velocity. 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 provides templates supporting SAFe, and it has an emphasis on cyber-physical products and regulated industries. IBM's roadmap includes forecasting using AI/ML, user-interface modernization and improvements in lean portfolio management.

### Strengths

- **Consulting Support:** IBM can scale up to meet the needs of large, complex technology and business transformation initiatives in any region through IBM Consulting.
- **Product Viability:** IBM's commitment to the enterprise tool market is evident in its comprehensive suite of products covering the full product development life cycle.
- **Product Support:** The vendor is connecting prospects with IBM experts as they evaluate the solution, and provides tutorials and in-product walkthroughs, as well as extensive online documentation to help onboarding and adoption.

### Cautions

- **Product Suitability:** IBM's product-offering focus on regulated, high-control environments may reduce its suitability for those seeking a less complex solution.
- **User Experience:** The toolset lacks the modern user experience features of the market leaders. Organizations that are used to modern user interfaces may find it a challenge to introduce this tool. IBM is planning to invest in modernizing the user interface to improve the user experience.
- **Product Offering:** IBM's solution in the EAP tools market requires two separately licensed products, Engineering Workflow Management and UrbanCode Velocity, which have to be implemented together to cover all the required EAP functionality.

## **Inflectra**

Inflectra is a Niche Player in this Magic Quadrant. Its EAP products include SpiraTest, SpiraTeam (small business) and SpiraPlan (enterprise), and focus on organizations requiring traceability from requirements to bugs and tests. Its operations appeal to regulated industries, and its clients tend to be financial services, energy and industrial, healthcare, biotech, government, and defense. Inflectra announced its extension of data hosting and global cloud hosting. This will make applications and websites accessible across cloud resources and on-premises, and help Inflectra focus on improving utilization in its platform and ecosystem.

### **Strengths**

- **Aiming at Regulated Industries:** Inflectra functionality supports agile teams that must meet regulatory, compliance and audit needs. Inflectra is also focused on the engineering side of the EAP market, especially cyber-physical systems and risk management.
- **Customer Experience and Business Model:** Inflectra is focused on a good out-of-the-box experience, relying on a simple user interface, along with onboarding and implementation services.
- **Continued Expansion:** Inflectra has started to invest in the expansion of partner networks and in growing enterprise sales internationally. These networks are beginning to build regional capability to support the product and capture new markets.

### **Cautions**

- **Niche Appeal:** Inflectra is doing well to serve the needs of a smaller market segment that requires strict quality, compliance and security-sensitive use cases with both hybrid cloud and on-premises options. However, the company needs to accelerate the marketing of its broader solutions to appeal to different business stakeholders and larger markets.
- **Ability to Scale:** Inflectra has great focus and execution, but is limited by a very small team in a private company with a small client base.
- **Evolution and Synergy:** It is easy for potential customers to get confused by multiple products that target different size organizations. Inflectra has limited features to support growing needs such as enterprise agile frameworks including SAFe, value streams and portfolio financial management.

## **Micro Focus**

Micro Focus is a Niche Player in this Magic Quadrant. Its ALM Octane and Project and Portfolio Management (PPM) tools are mainly focused on portfolio-level management of software engineering work executed using multiple tools and methods. 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 aims to move its products toward

value stream management and high-level portfolio management while maintaining its emphasis on quality management.

#### Strengths

- **Size and Presence:** Micro Focus is a sizable organization with a global presence, enabling it to serve large international clients.
- **Regulated Industries:** Micro Focus's knowledge of regulatory compliance and quality assurance makes it well-suited for clients in regulated industries.
- **Hybrid Method Support:** Micro Focus supports a range of software engineering practices, including, but not limited to, agile, enabling its clients to employ hybrid methods.

#### Cautions

- **Value Stream Centricity:** Micro Focus emphasizes DevOps value stream management over enterprise agile planning in its product roadmap, making it less well-suited to clients focused on agile at scale.
- **Responsiveness to Market:** Micro Focus has been slow to respond to changes in this market in terms of its vision and product strategy.
- **Marketing Effectiveness:** Micro Focus has been ineffective in reaching and influencing this EAP market.

### **Planisware**

Planisware is a Challenger in this Magic Quadrant. Planisware Enterprise and Planisware Orchestra are mainly project-and-portfolio-management-based approaches to enterprise-scale agile. Its operations are geographically diversified, and its clients tend to be midsize to large organizations across various sectors. Planisware's product vision includes portfolio and team-level planning and execution, enhanced collaboration features, value stream management capabilities, and support for OKRs.

#### Strengths

- **Established Vendor:** Planisware is well-established as a PPM vendor and has been successful in entering the EAP market.
- **Geographic Growth:** Planisware has expanded its geographic presence beyond its roots in EMEA into the Americas and the Asia/Pacific region.
- **Customer Experience:** Planisware has demonstrated high customer retention, with an emphasis on customer success and customer engagement. The vendor received positive customer feedback.

#### Cautions

- **PPM Approach:** Customers using a digital product organization model may find it difficult to adapt to Planisware's PPM-based approach.

- **Private Ownership:** While Planisware shows strong financial health, its commitment to private ownership may make it more difficult to take advantage of opportunities such as growth through acquisition.
- **Industry Focus:** Though Planisware has shown good levels of satisfaction among its broad customer base, only in the past five years has its focused expertise been broadening beyond its new product development base.

## **Planview**

Planview is a Leader in this Magic Quadrant. Its EAP solution consists of Planview Enterprise One and Planview LeanKit. Its operations are geographically diversified, and its clients tend to be located in the Americas and EMEA regions. After a prior year of acquisitions, alliances and new owners, which positioned the vendor strongly for the future, Planview has strongly invested in customers and features this past year. Planview is investing in, among other items, outcome roadmapping, machine learning insights to delivery, and connecting agile program planning and delivery with portfolio management.

### Strengths

- **Tasktop Partnership:** Planview has strengthened its partnership with Tasktop, which enhances its ability to cover the value stream management aspects of EAP. It also created Planview Labs, which is a fast turnaround customer engagement model to innovate new ideas aligned to customer needs.
- **Hybrid Portfolio Management:** Planview's EAP solution offers strong hybrid portfolio and SAFe support. The vendor is a good choice for organizations with differing degrees of agile competency and a combination of agile and waterfall methodologies. Its vision is to connect planning and delivery with strategy and results, which will help customers get better oversight.
- **Improved Agile Expertise:** Planview has invested in strengthening its agile expertise and engaging more with customers on their agile transformations. This includes hosting sandbox builds and multiday agile workshops.

### Cautions

- **Brand Recognition:** Planview's brand recognition is below others in the Leaders quadrant. The vendor needs greater marketing emphasis to adequately compete and build market share against larger players in this market.
- **Agile Transformation Sales Model:** With agile adoption on the rise in Gartner inquiry calls, helping customers with transformations is a key sales model for EAP vendors. Planview needs to strengthen its agile transformation sales model to keep up with other vendors in this market.
- **Roadmapping:** Planview's roadmapping capabilities are weaker than other top vendors in this Magic Quadrant. If roadmapping is critical to your needs, you need to consider this.

## **ServiceNow**

ServiceNow is a Leader in this Magic Quadrant. Its EAP tool is called IT Business Management (ITBM, soon to be renamed Strategic Portfolio Management [SPM]), built on the vendor's Now Platform. ServiceNow is an established vendor and has operations worldwide. Its EAP product targets midsize to very-large-enterprise organizations. During the past year, it expanded its financial management support and extended its integration with third-party tools such as Azure Pipelines and GitLab. In March of 2022, ServiceNow delivered a large enhancement release called San Diego, which included significant user experience improvements.

### Strengths

- **Platform Ecosystem:** ServiceNow ITBM (soon to be SPM) is built on the Now Platform, providing integration of strategic operations with development work in a single unified backlog.
- **Vendor Viability and Commitment:** ServiceNow is a profitable, growing enterprise with substantial commitment to the enterprise agile planning tools market and a regular cadence of product features and functionality.
- **Product Support:** The tool benefits from ServiceNow's extensive support and geographical presence.

### Cautions

- **Market Responsiveness:** The ServiceNow ITBM (soon to be SPM) product trails behind other EAP market leaders in releasing innovative functionality and offering a modern user interface and user experience. With ServiceNow's new quarterly release model this may improve.
- **Product Offering:** The tool is underpinned by the ServiceNow Now Platform, which gives a consistent look and feel across the ServiceNow product line. Organizations with an investment in ServiceNow solutions will find this attractive. Those with another ITSM solution may not see it as financially appealing.
- **Customer Experience:** Some clients report challenges with the initial configuration and customization of the tool.

## **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, an on-premises version; and Polarion X, a SaaS option. Its operations are global and geographically diversified. Siemens continues to focus investments on standards for software and cybersecurity for cyber-physical systems and heavily regulated industries by automating traceability, reporting and compliance.

### Strengths



- **Cyber-Physical Focus:** Siemens has a strong platform and vision to support cyber-physical and embedded systems. Siemens bridges the gap between tools used for physical product life cycles and software delivery toolchains, enabling collaborative work and visibility across both domains.
- **Support for Complexity:** Siemens Polarion supports complex products in complex environments, especially for cyber-physical and embedded systems. Its digital twin capability allows organizations to create a digital representation of their environments and enables them to model, plan and simulate.
- **Support for Regulated Industries:** Siemens has significant support for regulated environments with strict quality and safety requirements. Polarion is well-suited for creating systems in a quality-sensitive, heavily regulated environment using agile methods.

### Cautions

- **Market Strategy:** Siemens' strategic focus on cyber-physical and regulated environments will impact its innovation in other areas of software delivery, which impacts adoption among organizations focused solely on software products.
- **Customer Experience:** Some customers find the UI antiquated, and struggle to implement and take advantage of features offered by the product.
- **Market Understanding:** Polarion reflects a niche perspective that focuses on offering SAFE support for cyber-physical systems and is project-based. The product lacks advanced features in several areas such as product roadmapping, Kanban and Scrum team support.

### TCS

TCS is a Niche Player in this Magic Quadrant. Its EAP tool capability consists of Jile, which is focused on agile planning and delivery, and TCS MasterCraft DevPlus, which supports multimodal deliveries. The majority of its users are drawn from TCS consulting engagements. Jile is cloud-only, hosted in the U.S., U.K. and India, while TCS offers MasterCraft DevPlus on-premises or on the India-based TCS Cloud. Seventy percent of TCS customers are in APAC, 14% are in the Americas and 16% are in EMEA. The TCS offering strategy for Jile and MasterCraft DevPlus encompasses enhanced portfolio management, the Jile Marketplace, the Jile community, and incorporation of cognitive and other AI technologies.

### Strengths

- **Jile Marketplace:** TCS continues to expand its third-party partnerships through its marketplace. The TCS Jile Marketplace offers complementary tools and plug-ins for integration with continuous integration/continuous delivery (CI/CD), testing tools, DevOps tools and utilities.
- **MasterCraft Academy:** TCS offers training and certification in MasterCraft DevPlus, as well as agile assessments, through its MasterCraft Academy.

- Third-Party Integration: TCS has partnered with Kovair to build over 100 integrations, and APIs for Jira, ServiceNow, and GitHub. It plans more integration in the future, consistent with its strategy to drive sales through TCS engagements.

#### Cautions

- No Capex-Opex: Jile's portfolio-level functionality is limited compared with that of the EAP tools of Leaders in this Magic Quadrant. TCS offers lean portfolio management features, reports, and value delivered versus spend, but no capex-opex tracking.
- Deep Discounting: Analysis of TCS customer growth versus revenue growth shows that "paying" customers grew 20% in the most recent year reported (from 72 to 90 customers), but revenue from software grew only 9.2%.
- Low Visibility: Even in its large MasterCraft customer base, Jile awareness/adoption is low. TCS Jile's web marketing and social media presence — together with tradeshow (when they resume), communities, webinars and online sales — have not yet raised awareness much beyond its focus in TCS engagements in APAC and EMEA.

### **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**

- Bee360
- Enalean

#### **Dropped**

Microsoft — Microsoft provides two independent EAP tools called Azure Boards and GitHub Enterprise. They are SaaS solutions with a high focus on developer and team productivity. The Azure Boards and GitHub Enterprise customer base is worldwide. The objectives and priorities of the developer tools at Microsoft, including these two tools, no longer align to Gartner's definition of this market.

## 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 2021:
  - Digital 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.
  - Hybrid 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 are 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
Market Responsiveness/Record	Medium
Marketing Execution	High
Customer Experience	Low
Operations	Low

Source: Gartner (April 2022)

## 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 or the location of your data 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 2022)

## 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.

Source: <https://www.gartner.com/doc/reprints?id=1-29T8617I&ct=220422&st=sb>

## 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 been strong over the past year with a continuing group of market leaders. There is a convergence of capabilities underway with adjacent markets including strategic portfolio management and value stream management platforms. As enterprises continue their adoption of agile, they are increasingly looking to a single tool to manage the strategy, investments, work being done and the resulting outcomes of value. Leading EAP tools support these needs and will become the foundation of continuous agile governance and improvement of business and customer value through iterative experimentation.

We see the following four key trends driving this market:

- **Convergence on the Value Stream:** IT leaders are increasingly looking to optimize their overall concept-to-cash software development life cycle or DevOps value stream. EAP tools are responding to provide better visibility and interconnections to all the tools along the value stream. Connecting these tools provides oversight starting with strategy and investments leading to work in the system and finally the feedback of the customer value realized by it. This full cycle feedback loop is instrumental in agile adaptive governance. This also results in a convergence with the adjacent VSMP market.
- **The Hybrid Future of Work:** The future of work post the COVID-19 pandemic has evolved into an increasingly hybrid work model. The EAP market continues to respond with increased online collaboration capabilities. Some EAP tools support these functions natively, while others interface to leading industry tools in email, instant messaging and virtual whiteboarding.
- **The Project and Product Hybrid:** We are seeing greater adoption of the product model to enable greater adaptability to IT customer needs. IT leaders need to govern hybrid waterfall, and agile work and teams, from a single tool. The product model helps bridge the business-to-IT gap and instills a culture of learning and customer focus. This results in a convergence with the adjacent SPM market.
- **Scaled Agile Support:** The EAP tools are gravitating toward richer support for SAFe over other agile scaling frameworks, which aligns to our increased call volume on SAFe implementations.

Several other trends are showing up in this market, including:

- **Objectives and Key Results —** Adoption of OKRs as a mechanism for setting strategy and tracking execution has increased. Several tools have begun supporting management of OKRs as a mechanism to organize strategy and objectives for agile enterprises.

- AI/ML — The first signs of machine learning are being deployed in EAP tools. It is primarily being applied to predictability of delivery for epics and stories based on historical information in the EAP tool, which is increasingly becoming the single source of truth. As the EAP tools integrate with more data, more insights can be derived.
- Cyber-Physical Systems — A group of vendors are established in the cyber-physical development life cycle space, including IBM, Inflectra, Micro Focus and Siemens. Due to the high risks involved in failure of these cyber-physical systems, there is an increased need for EAP tools to provide rich support of compliance and auditing.

## 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.