IDC MarketScape

IDC MarketScape: Worldwide Agile Project and Portfolio Management 2020 Vendor Assessment — Enabling Business Velocity for Digital Innovation

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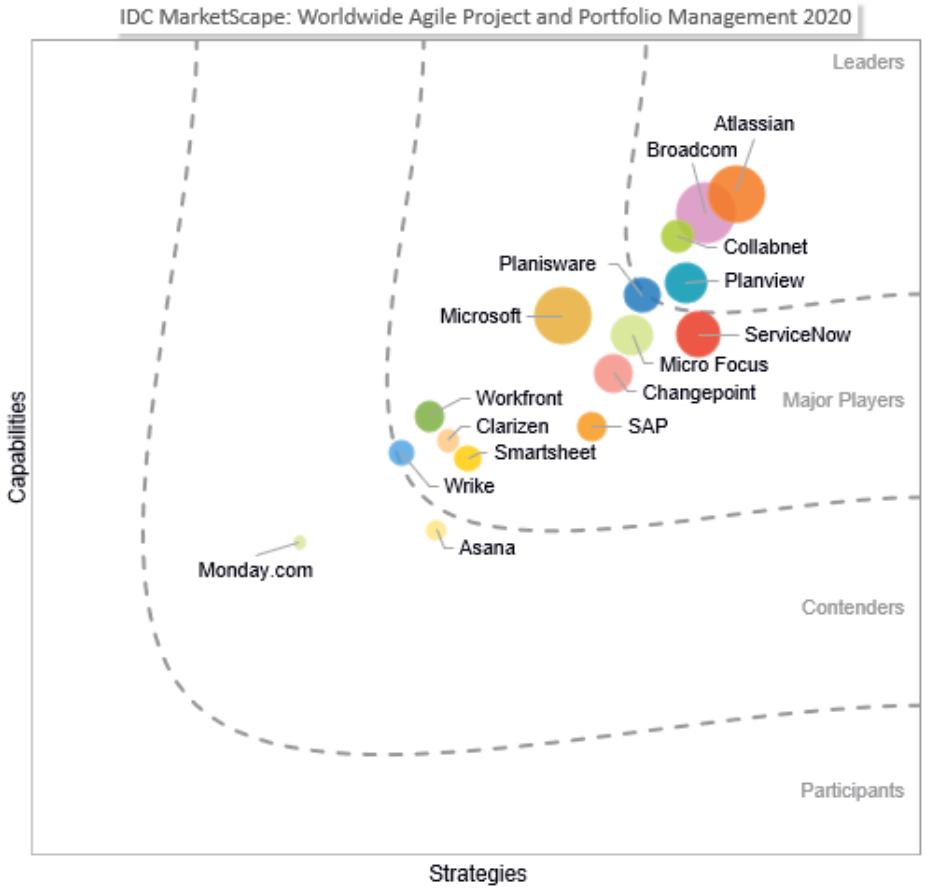
THIS IDC MARKETSCAPE EXCERPT FEATURES ATLASSIAN

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Agile Project and Portfolio Management Vendor Assessment



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Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Agile Project and Portfolio Management 2020 Vendor Assessment — Enabling Business Velocity for Digital Innovation (Doc # US44483219). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

Business dynamism and the drive to interweave digital innovation competitive execution demand adaptive, agile collaboration across business stakeholders, teams, product development, and software and systems engineering. As software drives competitive advantage at an increasing velocity along with overwhelming levels of deployment complexity, IDC sees increased interest in, demand for, and adoption of agile approaches for business initiatives for overall project, program, and portfolio management. Further:

- As core benefits, agile strategies can enable prioritized, compressed, tighter, faster, and iterative cycles for business evolution, project and portfolio management (PPM), and software development. We see demand for agile strategies increasing significantly in those areas and also playing a role in the emerging market for ideation and product life-cycle management.
- All businesses benefit from the advantages of agile approaches, particularly in volatile geopolitical circumstances and a highly competitive, unpredictable global economy. But with increased agile engagement and adoption also comes a need for governance and management. IDC's analysis shows that initial and/or more systemic agile strategies are in place at over 85% of the organizations with which we interact.
- At the same time, hybrid approaches to agile dominate as organizations and businesses transition. We see agile PPM providers enabling mixed, hybrid approaches to facilitate a process shift with nuanced agile adoption for many (as companies seek to move toward systemic and scaled agile longer term). Exemplifying combined processes on the development side, IDC's PaaSView and the Developer 2019 research showed that 65% of developers were using agile or iterative, rapid prototyping and 30% were using waterfall approaches (out of 2,500 respondents).
- Pervasive uptake of agile approaches for software development is increasingly driving demand for agile automation, given business dependence on software velocity for competitive position across platforms. The focus for IDC's current IDC MarketScape for agile PPM is on the coordination between agile and project and portfolio management as we see agile adoption spilling into and transforming business and IT environments, which continue to drive adoption overall. We also see demand for and the emergence of improved analytics including AI/ML capabilities for agile PPM data such as proactive contextualization and predictive analytics.
- Product and software development are intertwined increasingly and also demand agile adoption and management (increasingly during 2020–2021). Continuous release (CR) and continuous integration (CI) and the role that agile plays as part of DevOps are subsidiary in this analysis, which focuses on agile project, portfolio, and program management primarily but

underlies agile initiation and adoption at many organizations. (While coordination with agile PPM and enablement of DevOps factors considered as part of this analysis, our IT PPM research targets that area more directly.)

- This IDC study provides a 2020 comparative vendor analysis and assessment for agile PPM. Project execution in brittle worldwide economic and political environments demands adaptive prioritization, and we saw demand for these capabilities driving strong engagement for all major and key innovative agile ALM vendors in 2019 moving into 2020–2022.
- The complexity of multimodal deployment/DevOps environments with mobile, social, cloud, and big data and analytics is a business necessity. And the complex sourcing needed for both business and IT projects also demands agile PPM automation as an adoption enabler to execute effectively. SaaS offerings for agile PPM by major providers and emerging from others to augment existing offerings is significantly contributing to a portfolio of solutions for agile PPM in the cloud and where needed, for on-premises and hybrid approaches.
- These capabilities are core to business execution; adaptability, resilience, and swiftness are imperatives, not merely "nice to have." As companies invest in projects, programs, products, and portfolios, we see a commensurate need for agile approaches to enable iterative, time-boxed, and speedier decision making and investment. Agile can help increase relevance and velocity at a time of fierce global competitive pressures and ongoing economic and political volatility and uncertainty (as well as opportunity).
- More generally, the increasing role and complexity of IT in the enterprise and the need to align IT with business needs, corporate governance, and a plethora of regulatory requirements have combined to support ongoing engagement with agile PPM.
- Agile vendors have been evolving their offerings, and we see an increasing crossover to the business from IT for agile processes and a role for agile across industries — from business, product, and marketing initiatives to embedded software and smarter project creation as well as obvious demand for agile application creation for software development. This began to have an impact earlier — with best-of-breed agile providers offering solutions and PPM vendors coordinating partnerships and/or acquisitions and building out offerings for agile and hybrid support. We expect improved and coordinated agile PPM tools along with the necessary process change to continue to play a role for increased user engagement and adoption at least through 2024.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

IDC evaluated 16 vendors for inclusion in this IDC MarketScape for agile PPM. Vendors needed to have deep, granular agile-specific functional capabilities available for excellence and/or partnerships to augment more limited agile process functionality. Vendors needed to appear in IDC discussions with end-user clients as part of RFP and other inquiry for agile PPM during 2019 moving into 2020 and should have minimum overall revenue of $20 million for CY18, with at least $5 million of that revenue as agile PPM revenue. Vendors evaluated are Asana, Atlassian, Broadcom, Changepoint, Clarizen, CollabNet, Micro Focus, Microsoft, monday.com, Planisware, Planview, SAP, ServiceNow, Smartsheet, Workfront, and Wrike.

IDC structured its approach to inclusion for vendors in the agile PPM category based on the strength of their products' agile capabilities complemented by portfolio management and/or collaborative work management (and in some cases, project and program management capabilities and partnerships), on revenue share in part (as indicators of agile adoption and longevity), and for differentiated agile position and capabilities in emerging markets of concern. The focus for IDC customers on agile-

specific functionality and existing and emerging support for scaled agile support via Scaled Agile Framework (SAFe) 4.6 (and plans for emerging SAFe 5.0 support targeted for 1Q20), and/or for Large Scale Scrum (LeSS) and/or Disciplined Agile Delivery (DAD), as well as process support for systemic adoption and engagement are key drivers for leadership. Not included in this research (which focuses on PPM as well as agile) but relevant for agile planning (and new product development) consideration would be providers such as Blueprint, GitLab, IBM, Jama Software, and Siemens, to cite examples.

ADVICE FOR TECHNOLOGY BUYERS

The increasing complexity and criticality of competitive organizational execution, related product and software systems, and unrelenting business pressures for software relevance, business project and program adaptability, compliance, cost savings, and faster time to market across distributed teams, partners, and service providers with complex sourcing demand agile approaches to software and business development and to project, portfolio, and program management. We see agile adoption carrying over increasingly to business initiatives as well. Key trends for agile adoption include coordination with process and organizational change (establishing and mentoring strong practices for consistent agile engagement), applying agile not merely in traditional development and business environments but also in emerging areas such as ideation for product development, coordination with embedded systems for "smarter products," and a starting point for "systems of systems" and Internet of Things (IoT) environments, which can benefit significantly from agile process approaches. (Agile adoption in these areas and for product development overall is increasing substantively since our last analysis of this market.)

Users need to assess both agile automation and their ability to create organizational and process change for effective adoption. While cultural barriers are a problem with any new technology, agile necessitates significant process change — a paradigm shift for companies — that is fundamental to both initial uptake and to enable evolution to systemic agile adoption and strategy over time. So as mentioned previously, we observe adaptive, hybrid agile approaches helping organizations make successful transitions.

IDC sees agile functionality coming from four key IDC functional market areas — software change, configuration, and process management (SCCPM); automated software quality (ASQ); project and portfolio management; and work management/team collaborative applications (TCA). This IDC MarketScape focuses on agile PPM, but it is helpful to understand the range of functional capabilities that feed into agile. SCCPM is where core agile processes and methodology content and automation lie (as well as encompassing code management, requirements, and the emerging DevOps market, including areas such as continuous integration and continuous release). Modernizing engagement with work via intuitive, engaging automation necessitates collaborative, agile approaches to work management. Coordination across all these areas with agile approaches is a requirement for users increasingly (and an opportunity for providers to meet demand). Also, agile quality and testing are key aspects of shipping secure, better-quality, better-performing code with continuous test (CT), as well as higher-quality products and initiatives overall. As electrical, mechanical, systems, and software engineering increasingly coordinate with one another, quality becomes a common focus along with ideation, portfolio, and value-based prioritization, and agile approaches to quality are key for software across environments, although for this study, overall PPM is our principal focus. Similarly, we see PPM providers offering agile process support and partnering with targeted agile providers to sustain and underlie agile approaches to project, program, and portfolio management; prioritization; compliance;

and execution. Leveraging all of these functional areas sets the stage for combined agile PPM adoption, with a primary emphasis on agile PPM coordination.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Atlassian

Atlassian is positioned in the Leaders category in the 2020 worldwide IDC MarketScape for agile PPM, due to its combined agile strategy and depth of agile capabilities with Jira Align and breadth of Jira Software adoption (along with additional collaboration and DevOps capabilities).

Atlassian's products related to this IDC MarketScape series for PPM include Jira Software, Jira Align, Portfolio for Jira, Confluence, Trello, Jira Service Desk, Bitbucket, and Bamboo.

With a pragmatic strategy that interweaves sufficiently broad and deep agile and other capabilities into the Jira platform without "overkill" to enable adoption by Atlassian's broad Jira user base, Atlassian, headquartered in Sydney, Australia, and founded in 2002, provides collaboration software to help teams organize, discuss, and complete shared work. Its product portfolio includes the widely adopted Jira Software. Relevant companion products for this analysis include Jira Align (formerly AgileCraft, acquired in 2Q19; see *Atlassian Acquires AgileCraft for a Strategic Perspective,* IDC #IcUS44942119, March 2019), Portfolio for Jira, Confluence, Trello (acquired in 1Q17) and, more tangentially, Bitbucket, Bamboo, and Jira Service Desk, as well as the recently announced (3Q19) Cloud Premium offerings for Jira, Confluence, and Service Desk. In addition, Atlassian's extensive marketplace has over 4,000 add-ons available from 1,000+ partners to augment product capabilities as of 4Q19. This vibrant marketplace, combined with 573+ solution partners, is a key aspect of Atlassian's ongoing growth and expanded adoption, which we expect to continue as the company takes advantage of its combined portfolio. We expect Atlassian to make further strides in supporting marketplace participants to enable easier access and improve Atlassian support platform capabilities for application development with upcoming product releases.

Jira Software is a platform that is quite intuitive, engaging, relatively inexpensive, flexible, and ubiquitous and to which most (if not all) key software companies integrate their products while also competing with Atlassian in other areas. Atlassian – through its acquisition of AgileCraft resulting in Jira Align – is positioned with excellent capabilities for agile PPM and, with additional products in the portfolio along with partner integrations, can support many aspects of ALM, DevOps, and other areas.

Atlassian has nearly 4,000 employees and around 160,000 distinct clients as of 4Q19. Atlassian is well positioned with exceptional execution and has experienced high double-digit growth for multiple, consecutive years (and a successful public offering in December 2015). We believe these successes resulted from its innovative sales approach; an intuitive, synergistic product set; and an engaging go-to-market strategy with an adaptive product portfolio that also leverages and augments open source technologies (e.g., Git with Bitbucket). This has benefitted both Atlassian and its customers. We believe the company is strategically positioned moving into 2020-2021 due to its responsiveness to changing dynamics in software development environments with a well-targeted solution set and its

acuity with regard to acquisitions and implementation of a combined portfolio. (Significant recent acquisitions are AgileCraft, along with Trello.)

Company Strategy

IDC's IT PPM analysis primarily focused on Jira Align and Jira Software (along with the broader Atlassian portfolio for DevOps). With the acquisition of AgileCraft in 2Q19, Atlassian deepened its positioning for enabling a transition to agile for the broad Jira Software user base, along with better coordinated Jira instances. (Jira's flexibility has resulted in disparate implementations by many organizations and resulting challenges with multiple Jira instances across teams. Jira Align, during its time as AgileCraft, honed experience, processes, and capabilities to help address Jira deployment disparities and to help unite previously splintered Jira workflows and instances.)

Atlassian's overall portfolio complements Jira Software to provide capabilities across work management including Trello and Confluence (team content creation and collaboration tool), Team Calendars (scheduling coordination add-on for Confluence), and the IT PPM and DevOps life cycle with Bitbucket (team code review sharing and management tool), Bamboo (release management tool), and for operations, with Jira Service Desk (IT service desk and customer service tool).

For IT PPM specifically, Atlassian has been evolving its agile capabilities and began to incorporate project portfolio management, complementing its existing functionality with agile capabilities from the AgileCraft acquisition in 2Q19 (as a follow-on to its much earlier acquisition of an Austria-based start-up vendor in the Jira Marketplace in 4Q14, which formed the basis for Portfolio for Jira). Jira Align (via AgileCraft) augments Atlassian's prior execution with granular functionality for enterprise agile execution, including extensive Scaled Agile Framework 4.6 capabilities, as well as support for Disciplined Agile Delivery, Large Scale Scrum, and other methodologies. For the DevOps aspect of the IT PPM analysis, Atlassian's Jira is integrated across the pipeline, and Atlassian also offers related capabilities with Bitbucket, Bamboo, and Jira Service Desk for operations support.

Jira Align helps link team actions directly to value, outcomes, and objectives and key results (OKRs). The product provides users with admin screens to integrate data with bidirectional synching from other tools (such as Jira, Microsoft's TFS, Broadcom's Rally, CollabNet's Version One, and IBM's RTC) using a "federated" approach with Jira Align's Team Reconciliation Engine (T-Rex). Jira Align augments basic "what if" analysis and forecasting with value engineering that can enable visibility into investment impact and value with feedback loops to teams and stakeholders to support portfolio decisions. Jira Align's 120+ out-of-the-box reports include work trees, status reports, road maps, and the ability to report on the combination of both agile and traditional work, for instance. Missing, however, is the ability to customize reports (which requires an additional expense to access Leo, Jira Align's data mart with OLAP cubes for analysis that can then be used in conjunction with business intelligence (BI) tools, such as PowerBI or Tableau). Also requested by users (and not yet available) is support for Jira Query Language (JQL) within Jira Align. Capabilities for ideation and collaboration include mind mapping, microservice collaboration rooms, gamification, and collective success criteria. Jira Align also enables lean/agile financial reporting, an area of increasing challenge for organizations as they evolve to systemic agile adoption (and as more conservative financial teams lag behind other parts of the company in their shift to agile, typically). Companies can establish budgets at a business level and can allocate across portfolios, programs, and value streams. For capex/opex, Jira Align users can leverage traditional time sheet and task-based approaches and/or lean/agile based on epic/feature flags associated with dollarized story points and related teamwork. To align work, Jira Align supports multitiered backlog management – portfolio, solution, and team levels; Program

Increment (PI) and sprint-level ranking for solutions, programs, and teams — sharing features to multiple programs to contribute to delivery (to help manage backlogs and plan); aligning backlog views to operation value stream processes and/or work states; and using velocity calculations to help rank, prioritize, and load balance across programs and teams within a single PI or across multiple PIs. The addition of Jira Align with its technical consulting resources also gives Atlassian the opportunity to incorporate knowledgeable services staff internally for execution across strategic, enterprise agile deployments potentially, depending on Atlassian's combined execution strategy as it continues to invest in Jira Align and surrounding R&D and support staff.

High-end, traditional project portfolio management has not been a target for Atlassian; however, now with Jira Align, Atlassian provides portfolio management with a lean/agile focus. Atlassian has focused on ease of use and quick adoption to enable a speedy on-ramp for users. Customers with whom IDC spoke referred to ease of adoption and cost savings as drivers for bringing in Jira Software rather than higher-end PPM competitors. This also fits the corporate model for Atlassian that provides a majority of needed, intuitive capabilities without "overkill." For enterprise agile support, Atlassian has Jira Align. For collaboration, customers can use Confluence, Atlassian's content collaboration software, and Trello, an intuitive platform to enable work that complements Confluence, Jira, and Jira Align. (Integration between Jira Align and Trello and between Jira Align and Confluence is not direct at this point and happens via Jira Software integration.) Recent Trello announcements in 4Q19 include template additions to jump-start adoption with templates for boards and cards and access to community gallery templates; inclusion of Butler (acquired 2018) as a core product offering to automate repetitive tasks for all Trello users and propose customized automation commands based on an individual's own usage patterns; and Suggested Actions, which learn common actions in Trello to propose comparable actions in similar circumstances. According to Atlassian, Trello also reached the 50 million registered user milestone (up from 20 million in 2017 when it was acquired). During 1Q19, Trello released a series of capabilities targeting broad organizational visibility and permissions and admin capabilities with Trello Enterprise. Confluence has broadened search capabilities with filtering by contributor, spaces, type of content, and labels, and it also enables visibility across product info and notifications for the Atlassian portfolio. Atlassian is also investing in learning from user behavior patterns to contextualize personal content and create other recommendations to help enable efficient usage, collaboration, and execution with functionality via Confluence.

Strengths

Atlassian's strengths include wide adoption of Jira Software with integration across Atlassian's product portfolio including Jira Align, Confluence, and Trello. Partnerships and an expansive Atlassian Marketplace provide a rich set of add-on options for users, and services via solution providers. We expect Atlassian to evolve its marketplace strategy further as part of its platform portfolio to engage developers and partners moving into 2020. Integration with a range of cross life-cycle tools enable positioning for Atlassian across related ALM areas of importance for development teams such as testing and quality management. Agile support (with Jira Align) is also a benefit in the context of development environments and emerging continuous deployment and DevOps. Cost-effectiveness, coupled with an intuitive interface, enables a quick on-ramp for adoption, which must be accompanied with strong process, cultural, and organizational support and training as well as scaffolding to establish consistent workflow and Jira instances. Atlassian's most recent cloud platform announcements (3Q19), including the launch of its premium plan, enable a strategy to help move on-premises Jira and Confluence customers to the cloud, targeting greater platform and customer experience consistency as adopted over time, improved client support, and the means to better unify a variegated Atlassian portfolio.

Challenges

Atlassian's expansive portfolio is challenging to market and sell as a combined solution, along with the need to unite a range of acquired products. For instance, consistent messaging and communication from the combined company for customers is key for existing larger Jira Align customers that rely on both the technical architects and the services resources (from what was AgileCraft) for larger deployments and also predictability about Jira Align as part of the Atlassian portfolio. Atlassian has invested significant resources in Jira Align already and presents it as a cornerstone for its agile strategy. Yet some (few) users adopted AgileCraft to enable a "one platform" approach; as Jira replaces the team capabilities of Jira Align with Jira, Atlassian must handle that transition as well as it is handling the overall inclusion of AgileCraft's assets with Jira Align.

Jira Software's flexibility has also led to inconsistent adoption across enterprises, with differing workflows and fractured instances that can require significant effort to bring together. For that reason, many organizations using Jira Software look to other PPM tools to enable Jira coordination (and/or to provide overall governance), though Jira Align now enables an in-house alternative (up to a point). Also, Atlassian's product portfolio has lesser functionality for enterprise project and portfolio management and for organizations focusing on traditional high-end PPM. This necessitates partnerships, which is an Atlassian strength (e.g., Planview and others, as well as the marketplace). Given the breadth of adoption of Atlassian's Jira Software, most software companies provide integrations for Jira Software, which also feeds a rich partner strategy for Atlassian. Data analytics with customizable reporting and consistent availability of JQL across all products were mentioned by some customers as a needed focus and opportunity. Machine learning and artificial intelligence are core emerging areas for which Atlassian's overall strategy remains opaque, although there are emerging capabilities for Trello (with Suggested Actions) and, potentially. Confluence in the search area.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard

characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

The agile project and portfolio management (PPM) market resides under IDC's application life-cycle management (ALM) software market, a "competitive" market with primary revenue from the software configuration, code, and process management (SCCPM) functional market and additional revenue from the project and portfolio management functional market and the automated software quality (ASQ) functional market (for agile testing and quality management) and now also team collaborative applications (for collaboration, an intuitive on-ramp and ease of engagement with team management capabilities). IDC's analysis in this IDC MarketScape on PPM provides visibility into agile-specific use of PPM, including scaled agile support, which is important as organizations mature significantly and are evolving systemic agile adoption across enterprises.

As context, it is helpful to surface the traditional definition of agile.

Agile development is a group of software development techniques based on iterative and incremental development where requirements and solutions evolve through collaboration between self-organizing cross-functional teams. It promotes adaptive planning, evolutionary development and delivery, and a time-boxed iterative approach and encourages rapid and flexible response to change.

IDC sees agile approaches moving beyond software development increasingly and being applied to non-IT business and other projects (including continuous flow). Sample agile methodologies include Kanban and lean, Extreme Programming (XP), Scrum, Agile Modeling, Feature-Driven Development (FDD), Dynamic Systems Development Method (DSDM), and Crystal.

Agile ALM and agile PPM automated software can be used for automating, managing, estimating, tracking, optimizing, and reporting on initiatives that incorporate time-boxed, iterative approaches to completion. Boundaries to define the automated, sample functional capabilities and approaches of agile PPM and agile ALM products in this market include:

- Fast feedback loops, the ability to manage projects, software change and test quality with feedback loops, and the ability to deploy quickly with continuous builds
- Iterative development and iterative project management and sprints, adaptive planning, and the ability to manage burndown rates, processes and workflows, and user stories and epics
- Automated build and continuous backlog management
- The way the work is done — having acceptance criteria drive development and pulling off highest-priority stack items — in other words, in agile environments, developers prioritize business value with a notion of completeness versus functional tasks completed (e.g., "whole requirement" creation)
- Support for agile processes, such as Scrum, XP, and Kanban — a continuous flow process that relies on Kanban boards, with policies and limits for how users move from one column to another with work-in-progress limits

- WIP limits — being able to manage the project in progress (x number of items) by setting the maximum amount of work that can exist in each status of a workflow (to help identify and reduce inefficiency)
- Cycle time or throughput, agile metrics, burn charts, and cumulative flow visibility and reporting also exemplify agile automation
- Leverage, visibility, and integration across agile and non-agile PPM systems for transitioning organizations
- Scaled agile support that is increasingly important to organizations as they mature in agile adoption; for that reason, we consider both certified support of and contribution to key scaled agile standards such as Scaled Agile Framework (SAFe) as well as support for other scaled agile methodologies such as Disciplined Agile Delivery (DAD) and Large Scale Scrum (LeSS) as part of our agile PPM definition

In addition to PPM and business evolution of related products, we see agile playing a key role to fully incorporate agile DevOps automation, bringing in additional providers, and broadening revenue allocation to encompass continuous release and continuous deploy. As is a focus for this agile PPM IDC MarketScape, beyond development, agile is increasingly used cross-industry to enable more adaptive and collaborative development and business approaches. Agile PPM enables agile project execution as a key aspect of that trend.

LEARN MORE

Related Research

- *IDC MarketScape: Worldwide Work Management and Project and Portfolio Management 2020 Vendor Assessment — Engaging a Dynamic Workforce* (IDC #US45940620, January 2020)
- *CollabNet and XebiaLabs Are Merged to Create a New Agile and DevOps Company* (IDC #lcUS45944520, January 2020)
- *IDC MarketScape: Worldwide IT Project and Portfolio Management 2019-2020 Vendor Assessment — Coordinating Adaptive DevOps for Digital Innovation* (IDC #US44483519, December 2019)
- *IDC MarketScape: Worldwide Cloud Project and Portfolio Management 2019-2020 Vendor Assessment — Agile Deployment Enables DX Management* (IDC #US44483419, December 2019)
- *Market Analysis Perspective: Worldwide Agile Application Life-Cycle Management, Quality, and Portfolio Strategies, 2019 — Driving Digital Optimization* (IDC #US44636919, September 2019)
- *Worldwide Project and Portfolio Management Software Market Shares, 2018: Evolving and Scaling Agile Execution for Projects and Programs* (IDC #US43883519, July 2019)
- *Worldwide Project and Portfolio Management Software Forecast, 2019-2023* (IDC #US44637419, June 2019)
- *Application Life-Cycle Management Competitive Market Forecasts, 2019-2022* (IDC #US44974219, March 2019)
- *Application Life-Cycle Management Competitive Market Share Pivot Table* (IDC #US44972619, March 2019)
- *Atlassian Acquires AgileCraft for a Strategic Perspective* (IDC #lcUS44942119, March 2019)

Synopsis

This IDC study uses the IDC MarketScape vendor assessment model to evaluate the agile project and portfolio management (agile PPM) market. This research enables analysis of quantitative and qualitative characteristics to provide metrics and context for users evaluating solutions in this area and to help analyze a vendor's current comparative success in the marketplace and to anticipate vendor evolution. Main user focus areas for this market include agile-specific capabilities in the context of coordination with project and portfolio management functionality, with support of highly iterative approaches across business initiatives, IT, and product development. We are seeing the coupling of agile processes to enable innovation and business execution in highly dynamic competitive environments, as well as ongoing PPM leverage for DevOps and end-to-end application life-cycle management capabilities with strong analytics for scaled, systemic agile PPM automation and adoption. These emerging capabilities help support iterative processes and growing demand for complex, multimodal deployments from cloud to mobile and embedded and the emerging systems of systems and IoT markets. Metrics with analytics based on this data (with the emergence of ML/AI capabilities) can help provide visibility and iterative collaboration to understand and improve internal and external services execution on IT projects, programs, and portfolios. Also included are in-depth vendor profiles for the 16 vendors assessed. This analysis complements the IDC MarketScape evaluations for IT PPM, PPM cloud, and work management being published concurrently, which enable four weighted IDC MarketScape views for PPM. This current agile PPM analysis includes assessment of agile-specific functionality within a PPM context, such as agile processes, agile-specific functionality (work in progress, burndown charts, backlog, agile metrics, etc.), and agile frameworks.

"IDC continues to see adoption of agile PPM solutions for dynamic execution and innovative decision making via automation to enable speedy responsiveness and invocation for dynamically changing initiatives," said Melinda Ballou, research director for IDC's Agile ALM, Quality and Portfolio Strategies service. "Complementing these capabilities, increasingly, we observe coordinated agile and project and portfolio management approaches for businesses and technology teams with agile PPM, helping focus teams with targeted execution, cutting delays to benefit, and improving metrics. It is in part due to these trends that IDC has chosen to prioritize this area as one of several areas of focus for our IDC MarketScape series for PPM. Leverage of agile to facilitate the handoff from project inception to execution, for business initiatives and from development to deployment (as well as DevOps for IT software project portfolios) brings key benefits. Coupling appropriate automation choices with organizational and process change for systemic agile PPM adoption is key."

About IDC

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