Critical Capabilities for Enterprise Agile Planning Tools

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Application and software engineering leaders seek enterprise agile planning tools that support both the work of their teams and portfolio management. This research evaluates and compares enterprise agile planning tools from 17 vendors across three use cases.

Overview

Key Findings

- Team-level agile work-tracking tools lack capabilities for managing value creation at the portfolio and product level and across the value stream. This significantly limits the benefits that these tools can deliver when scaling agile delivery.

- The functionality needed to support a product portfolio differs greatly from what is needed for a traditional project and program portfolio. Selecting a tool for the latter will not enable effective product management. Portfolio management requires both digital and hybrid project/product capability.

- Not all agile planning tools provide sufficient capability to support enterprise agile frameworks (EAFs). This is more evident when scaling with the processes and practices of the Scaled Agile Framework (SAFe). This often leads to challenges when delivering complex interdependent releases according to a cadence.

Recommendations

Delivering enterprise software using agile practices at scale requires that application and software engineering leaders:

- Select tools that support planning and tracking across the portfolio by shortlisting and evaluating enterprise agile planning (EAP) tools with good capabilities for engineering teams and also for portfolio management.

- Manage hybrid portfolios — or portfolios in transition from project to product — by implementing tools that support both parts of those portfolios. Transitioning organizations struggle unless they select EAP tools with sufficient coverage for both projects and products.

- Select a tool that supports multiple enterprise agile frameworks by reviewing this Critical Capabilities report and the companion Magic Quadrant. When scaling with SAFe, it is essential to support the framework by selecting a tool with specific and comprehensive SAFe support.

What You Need to Know

This document was republished on 16 May 2022. The document you are viewing is the corrected version. For more information, see the Corrections *page on gartner.com.*

EAP tools support customer-centric, collaborative and cooperative practices that are driven by business outcomes. They enable continual stakeholder feedback through visualization and reporting. They represent an evolution beyond project-centric agile tools and traditional application development life cycle management (ADLM) tools.

We define three use cases in this document:

- **Digital product portfolio —** This use case represents the portfolio structure used by most enterprise agile frameworks. In this model, the project and program layers are replaced by a single layer consisting of long-term teams that focus on products. A "product" in this context comprises a group of features or business capabilities that improve business outcomes for internal or external customers.

- **Hybrid project, program and product portfolio —** This use case supports a transition from the traditional way of managing, with the project as the primary container for work. This use case is important to organizations that are new to agile or transitioning from project to product management. Transitioning organizations require EAP tools with sufficient coverage for both projects and products.

- **Scaled Agile Framework (SAFe) —** The SAFe use case requires support for a distinct portfolio management approach associated with value streams and product lines. SAFe is the most popular agile scaling framework, [1] and requires a tool supporting its terminology and processes.
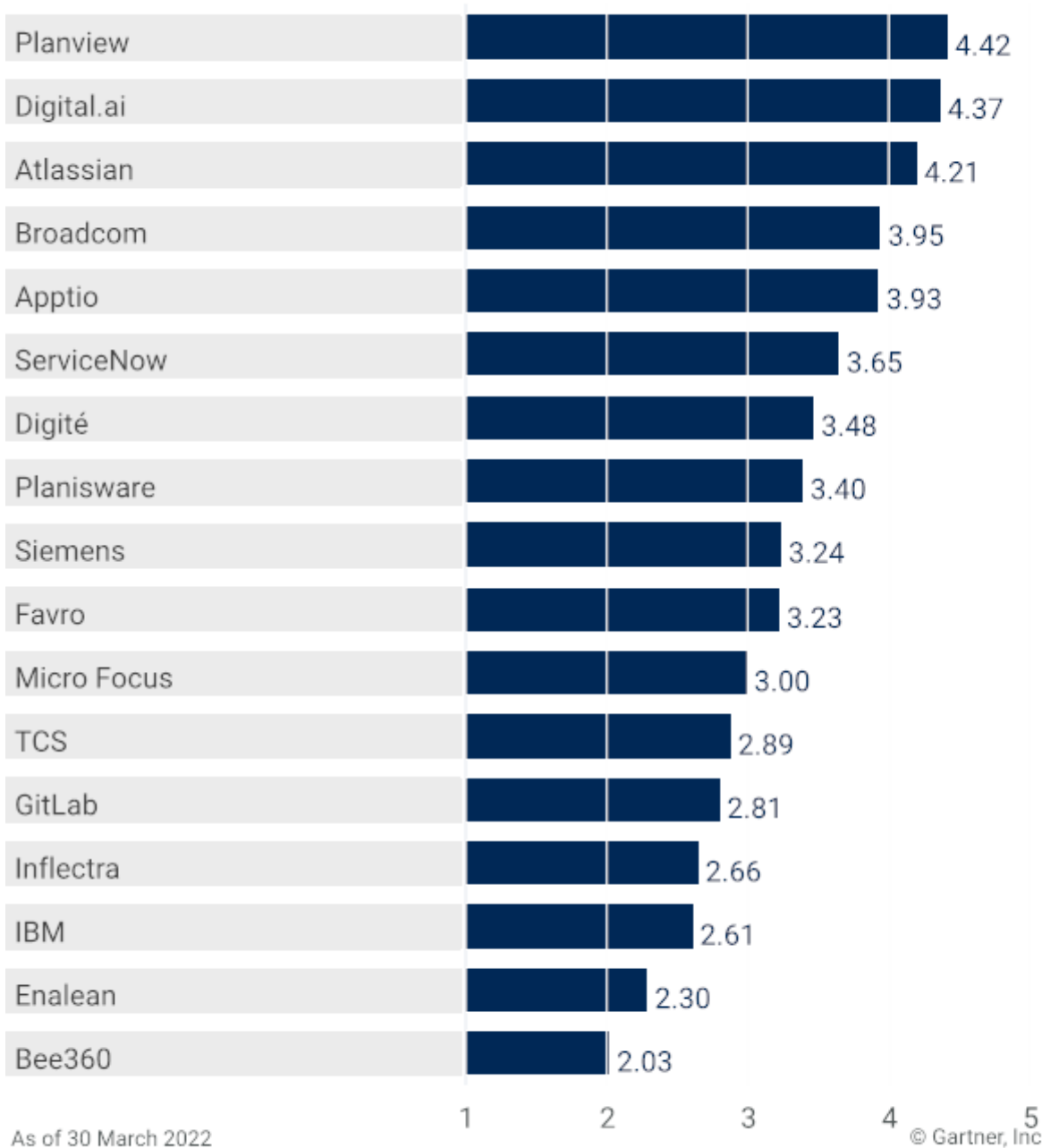
Analysis

Critical Capabilities Use-Case Graphics

Vendors' Product Scores for the Digital Product Portfolio Use Case   ⬇

Product or Service Scores for Digital Product Portfolio

Vendor	Score
Planview	4.42
Digital.ai	4.37
Atlassian	4.21
Broadcom	3.95
Apptio	3.93
ServiceNow	3.65
Digité	3.48
Planisware	3.40
Siemens	3.24
Favro	3.23
Micro Focus	3.00
TCS	2.89
GitLab	2.81
Inflectra	2.66
IBM	2.61
Enalean	2.30
Bee360	2.03

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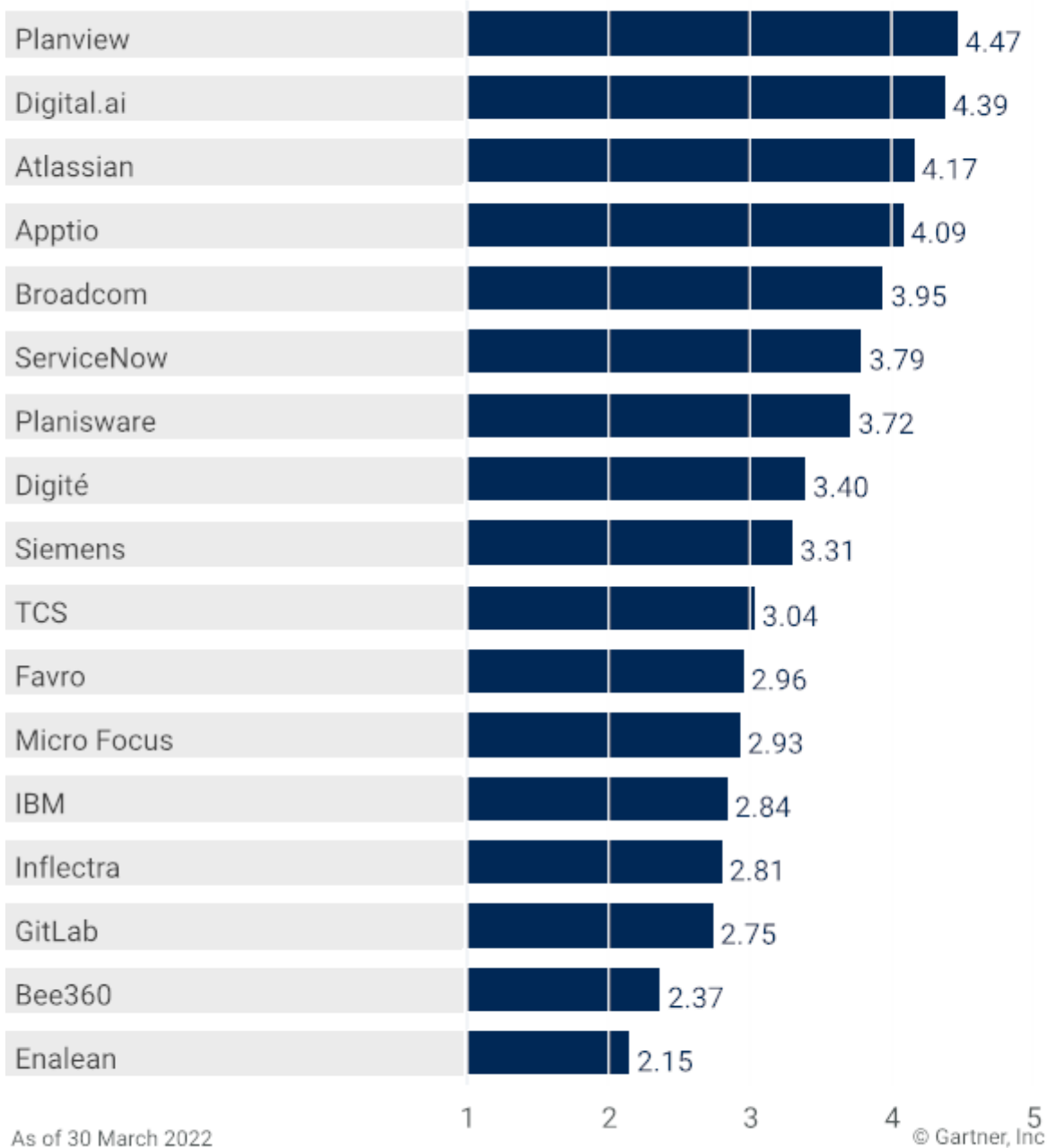
Gartner

Source: Gartner (April 2022)

Vendors' Product Scores for the Hybrid Project, Program and Product Portfolio Use Case

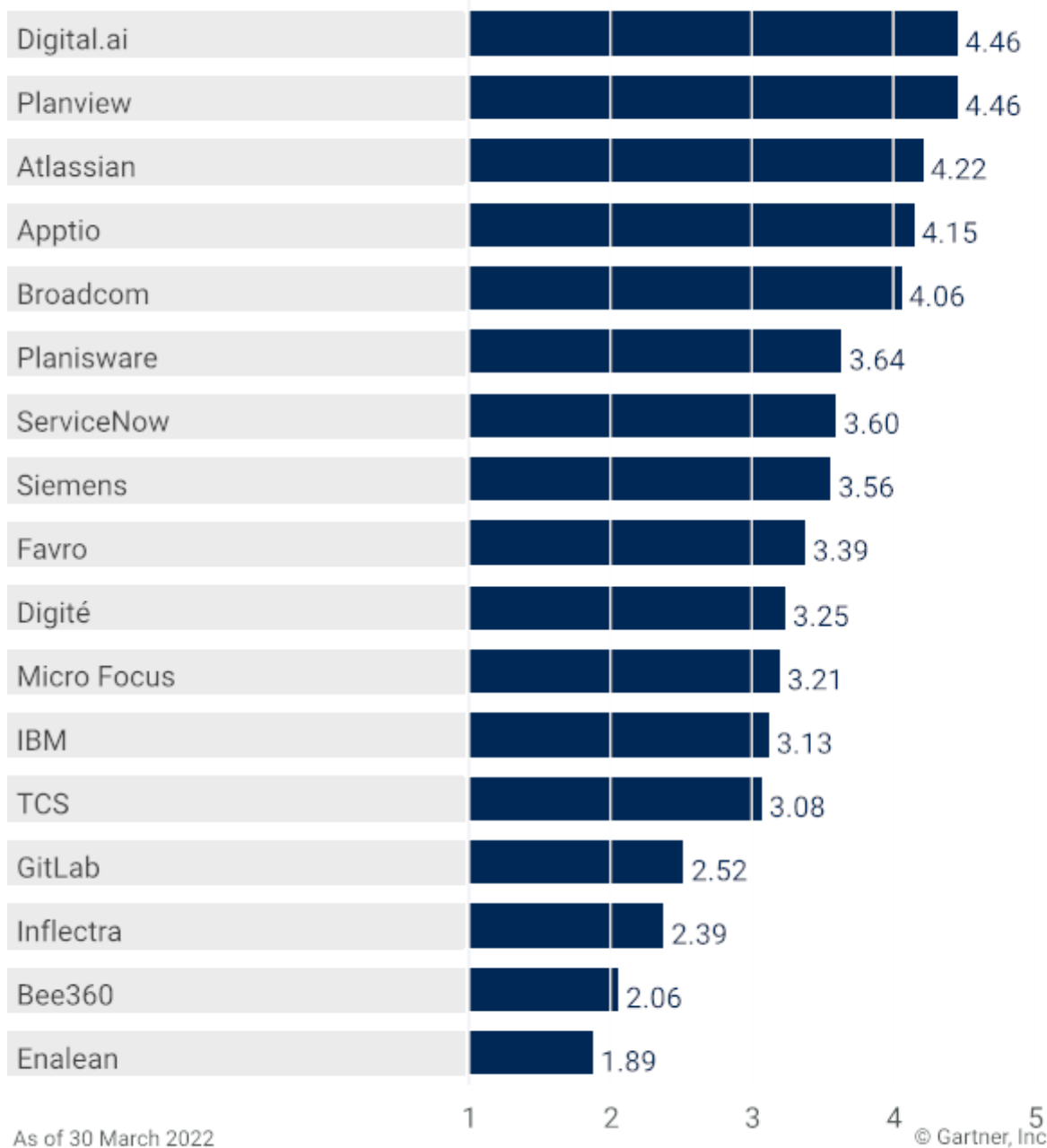## Product or Service Scores for Hybrid Project, Program and Product Portfolio

Vendor	Score
Planview	4.47
Digital.ai	4.39
Atlassian	4.17
Apptio	4.09
Broadcom	3.95
ServiceNow	3.79
Planisware	3.72
Digité	3.40
Siemens	3.31
TCS	3.04
Favro	2.96
Micro Focus	2.93
IBM	2.84
Inflectra	2.81
GitLab	2.75
Bee360	2.37
Enalean	2.15

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Vendors' Product Scores for the Scaled Agile Framework (SAFe) Use Case

Product or Service Scores for Scaled Agile Framework (SAFe)

Vendor	Score
Digital.ai	4.46
Planview	4.46
Atlassian	4.22
Apptio	4.15
Broadcom	4.06
Planisware	3.64
ServiceNow	3.60
Siemens	3.56
Favro	3.39
Digité	3.25
Micro Focus	3.21
IBM	3.13
TCS	3.08
GitLab	2.52
Inflectra	2.39
Bee360	2.06
Enalean	1.89

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Vendors

Apptio

Apptio's EAP tool is called Targetprocess. Apptio continues as a leading vendor in this market. Targetprocess enables organizations to drive lean and agile development at scale and appeals to organizations that are transitioning from project to product portfolios. Apptio's acquisition of

Targetprocess promises significant enhancement of its financial management capability, linking software delivery with enterprise strategic objectives and measured business outcomes. Already, the Targetprocess offering provides excellent visualization throughout and particularly when representing financial information at the portfolio level, most notably for capital expenditure (capex) tracking.

Targetprocess is deployed either in the cloud or on-premises. Targetprocess facilitates remote collaboration with in-built notifications, and extensive integrations with complementary tools such as Miro. Targetprocess has solid integration capabilities, more than 70 connectors, bidirectional autosync with Atlassian Jira and Microsoft Azure DevOps (ADO), and supports both native and tool-enabled integrations with DevOps pipeline tools.

Targetprocess received its highest use-case score for SAFe, and appears in the top four, just behind Atlassian, Planview and Digital.ai, due to its comprehensive support for scaling. Targetprocess supports several other enterprise agile frameworks, including Disciplined Agile and Large-Scale Scrum (LeSS), as well as hybrid frameworks. It offers strong support for both project and product portfolio management. Its team-level solution offers excellent support for Kanban-based and Scrum-based practices and can also work in conjunction with other team-level tools. Targetprocess scored in the top five for all use cases.

Buyers looking for a leading EAP tool with world-class integration and portfolio management should consider Apptio's Targetprocess.

Atlassian

Atlassian's EAP tool is Jira Align. Jira Align remains a leading product in the market. It is a full-featured solution with built-in support for multiple agile frameworks. It supports enterprises keen to foster collaboration between business and technology teams, with a focus on customer outcomes and optimizing for efficiency through value streams.

Jira Align can combine data from many teams using varying methodologies and team-level tools. It has great integration with other tools in the Atlassian ecosystem, such as Jira Software, and integration extends to other popular tools, such as Microsoft Azure DevOps. Atlassian's decision to end sales of and support for its on-premises Server offering signals a long-term shift to cloud-based offerings, which may not be appropriate for some clients.

Jira Align received the highest score for the SAFe use case, due to its comprehensive support for the framework, including multitier value streams, program room for Program Increment (PI) Planning, and checklists to guide users through tasks. It also received excellent scores in all other use cases, scoring in the top third for everyone, with excellent roadmapping and backlog management capabilities.

Buyers looking for a leading comprehensive EAP tool with modern UI, rich support for SAFe, end-to-end (E2E) visibility to the value stream, and strategy alignment should consider Jira Align.

Bee360

Bee360's EAP product — Bee360 Enterprise Agile Planning — focuses on improving process and product management capabilities and integration with DevOps toolchains. Bee360 positions its product to support what it calls "holistic IT management" by providing insights to business and IT roles on IT strategy and demand management, project execution, governance and budgeting.

Bee360 has its main operations in EMEA and a service center in Asia/Pacific (APAC) supporting clients worldwide, with the majority of clients in the manufacturing, financial and energy sectors. Although the largest share of revenue is from Europe (40%), we see greater growth in APAC and the Americas.

Bee360's main features and capabilities are focused on maximizing value from IT. It offers limited portfolio and product planning capabilities, as its focus is on providing a lightweight platform. Bee360 has invested in integration with communication tools such as Atlassian Confluence and Microsoft Teams to improve team collaboration activities. 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.

Bee360 scores very low in the three use cases. Bee360 scored near the bottom (16th of 17) in both hybrid portfolio and support for scaling frameworks, and at the bottom for the digital product portfolio use case.

Bee360 includes consulting services in its product offering, with 60% of revenue from services, so it may not be suited for organizations that are simply looking for a tool.

Broadcom

Broadcom offers two applications to satisfy all the critical capabilities and use cases within this market; Rally Software for scaled enterprise agile and Clarity for portfolio and program management. Both applications support multiple methodologies, allowing both projects and products to coexist with Gantt charts and Kanban boards as required. Broadcom continues to offer both products to this market, and buyers will have to consider whether to become skilled in both. Offered as both SaaS and on-premises solutions, both applications integrate with other tools to enrich their functional offerings.

Broadcom's Rally and Clarity remain strongest in their ability to support both the digital product portfolio and the SAFe use cases, where they feature in the top third. With strong capabilities around support for scrum and Kanban teams, the addition of supporting features such as sensed patterns for WIP and retrospective support tools make them clear leaders. A Scaled Agile partner, the combined Broadcom offering supports SAFe 5.1. Despite that, innovation related to enriching these capabilities has been overdue, and Broadcom has announced its intention to invest in them.

Broadcom is also in the top third in the use case scores for hybrid project, program and product portfolio. Clarity relies upon data from Rally or other source system integration such as with JIRA. Its

strong portfolio and program management functionality is wholly dependent upon this symbiotic relationship, which weakens its performance in this use case.

Mature, large organizations looking to scale agile or expand SAFe across the enterprise should consider Broadcom's Rally and Clarity as suitable EAP tools.

Digital.ai

Digital.ai's EAP tool is Digital.ai Agility.

Digital.ai Agility remains a leading product in this market, and provides an AI-powered value stream delivery and management platform to help businesses with customer-facing products meet their business objectives and improve value delivery.

The product provides strong visibility across the development value stream, with the integration of its Digital.ai AIOps solutions' (formerly Numerify's) artificial intelligence (AI)/machine learning (ML)-based platform for change risk prediction. It incorporates the application release orchestration capabilities of what was formerly XebiaLabs DevOps and intelligent value stream management. Its collaboration capabilities have improved over the past year, with team rooms and remote program increment (PI) planning room support for SAFe.

Digital.ai Agility received the highest scores in the SAFe use case (tied with Planview) and scored second in digital product portfolio and Hybrid portfolio support — due to its excellent roadmapping, backlog management, predictive analytics and probabilistic forecasting capabilities.

Large organizations looking for a leading EAP tool with analytics, end-to-end value stream visibility and insights to support a highly advanced agile enterprise should consider Digital.ai Agility.

Digité

Digité's EAP solution consists of three products: SwiftKanban, SwiftEASe and SwiftEnterprise.

Digité has strong Kanban features not only in its SwiftKanban product, but throughout SwiftEASe and SwiftEnterprise as well. Many features of those products use Kanban as their foundation. For example, product roadmapping and backlog management employ Kanban; even the process of backlog management, not just the backlog itself, is represented as a Kanban flow. For most features, this works fairly well. SAFe support is average.

Digité's EAP suite has improved in most respects year over year. Digité has plans to enhance its project and portfolio management (PPM), financial management and resource management capabilities. Usability and collaboration are also areas that Digité has targeted for improvement. The products continue to be relatively weak in the visibility they provide into the overall value stream.

Digité's EAP suite received its highest score for the digital product portfolio use case. It scored in the middle third for all use cases.

Buyers looking for an EAP tool for use in a digital product organization that makes heavy use of Kanban in its software engineering practices should consider Digité.

Enalean

Enalean's EAP tool is Tuleap. Enalean is a new player in this market, with ambitions to deliver support for cyber-physical systems, business agility and SAFe. However, Tuleap is not currently configured to support Portfolio SAFe 5.0 fully. Through templates, it is possible to manage an agile release train in Essential SAFe. Tuleap does support regulatory compliance and traceability and intends to evolve full capabilities for managing cyberphysical systems.

Deployed as a cloud or on-premises solution, Tuleap complies fully with EU regulations, including General Data Protection Regulation (GDPR) and ISO certifications. Some medical, automotive and manufacturing customers use Tuleap to ensure their ISO compliance.

Enalean's Tuleap scores very low in the three use cases. Tuleap scored near the bottom (16th of 17) in the digital product portfolio use case and at the bottom in both hybrid portfolio and SAFe.

Buyers looking for an EAP tool for small-to-midsize businesses, particularly in Europe where Enalean focuses, may consider Tuleap, as its functionality will deepen and improve over time.

Favro

Favro is the enterprise agile planning tool from the company of the same name.

Its card-based solution is customized and supported for use by agile coaching partnerships, and is able to support various agile frameworks including SAFe 5.1. Favro is available as a SaaS enterprise-grade platform that integrates with other SaaS tools to enrich its functional offerings to gaming and SaaS industry clients.

Favro features in the middle third of the hybrid project, program and product portfolio use case. It relies upon integrations with applications such as Slack, Google, Dropbox and OneDrive to enhance the application's built-in messaging and collaboration capabilities. Two-way JIRA integration allows data to be synced seamlessly between the two applications, providing support for both agile and nonagile methodologies. While its ability to produce visually enriched dashboards is a clear differentiator, Favro lacks any advanced capabilities to support financial or resource management at the portfolio level.

Favro's strength lies in its ability to support digital product portfolios across a multitude of agile frameworks, such as SAFe. Its placement in the middle third in the SAFe use case was its highest score. Its ability to support multiple teams and methodologies with team-level planning and scheduling is enabled by the flexibility of its drag-and-drop cards. This flexibility, coupled with its numerous webhooks and APIs, allows teams to customize their shared workspaces or boards. This places Favro firmly in the mid ranges of both of these use cases.

Favro specifically targets midsize enterprises, business technology teams and game developers. However, any organization looking for an EAP tool with proven flexibility and gamer-style interfaces to encourage enterprisewide adoption should consider Favro.

GitLab

GitLab's EAP tool is also called GitLab.

The tool continues to resonate with developer-led organizations looking for support for continuous integration/continuous delivery (CI/CD) and benefits from end-to-end value stream capabilities. Its user interface is simple, with most navigation through browsing folders, search function and keyboard shortcuts. Some tasks can also be carried out by entering quick action commands in comment or description fields.

GitLab's "open core" development model encourages inputs from the developer community, leading to periodic releases. The tool features a built-in wiki, with good collaboration features like integrated commenting on flow objects, discussion threads and other communication needs. It supports product roadmapping and backlog management, and focuses on optimizing workflows for software delivery which provides good integration with third-party tools. GitLab provides limited support for digital product portfolios and hybrid portfolios, and does not natively support SAFe. These constraints should be a factor in the evaluation of GitLab as an EAP tool.

Due to its focus on software engineering, GitLab scored in the bottom third for all three use cases.

Buyers looking for an EAP tool for developer-led activities should consider GitLab.

IBM

IBM's EAP product offering includes Engineering Workflow Management, part of its Engineering Lifecycle Management (ELM) suite, and UrbanCode Velocity.

The suite offers a good solution for organizations building cyber-physical products or operating within regulated industries. However, it lacks the modern user experience features of products from the market leaders.

IBM Engineering Workflow Management's support for SAFe has evolved over the past year. It supports full SAFe configuration through the use of templates. Specific SAFe support also includes dependencies visualization, value streams and a risk management board. There is support for multimethodology work at the team level in the same ART. There is comprehensive online documentation to ease adoption of the tool. The portfolio management capabilities could be improved to support organizations maturing in agile practices. Its collaboration capability is centered on commenting on work items, with external integration to Cisco Jabber. UrbanCode Velocity provides a data lake that collates data from tools across the DevOps value stream and displays a value stream dashboard, but it requires referring the data to another tool for analysis.

IBM Engineering Workflow Management and UrbanCode Velocity received their highest score for the SAFe use case, in the middle third. IBM scored in the bottom third for the other two use cases, due to limited capabilities for roadmapping, Kanban team support, financial management and forecasting.

Inflectra

Inflectra's EAP products include SpiraTest, SpiraTeam (small business) and SpiraPlan (enterprise). Inflectra's EAP suite appeals to organizations operating within regulated industries requiring traceability. It has good functionality for tracking requirements, defects and tests.

The Inflectra solution continues its good integration with third-party tools, but SAFe support is through a program management module and mapping to SpiraPlan artifacts. It supports product roadmapping and backlog management, with collaboration capability centered on instant messaging and document management systems.

It scored in the bottom third for all three use cases. It has very basic portfolio financial management functions, along with limited delivery forecasting capabilities.

Buyers in regulated industries seeking robust compliance and auditing capabilities should consider Inflectra among their shortlist of EAP vendors.

Micro Focus

Micro Focus' EAP solution consists of two products: ALM Octane and Micro Focus Project and Portfolio Management.

Micro Focus' solution focuses on regulatory compliance, traceability and quality management. Accordingly, it supports a range of software engineering methods in addition to agile, making it suitable for a hybrid environment. It offers good portfolio management capabilities, including financial management. Its SAFe support in particular has improved; its implementation demonstrates a good understanding of the framework, and the result is a solid set of portfolio-level features. Collaboration, however, remains a weak point, despite its increasing importance with the rise of remote work.

Micro Focus' EAP suite received its highest score for the SAFe use case. It scored at or near the bottom of the middle third in all use cases.

Buyers looking for an EAP tool for use in a regulated industry or with a quality assurance focus should consider Micro Focus.

Planisware

Planisware's EAP solution consists of two products: Planisware Enterprise and Planisware Orchestra.

Planisware Enterprise is an established PPM tool; Planisware Orchestra is a relatively new addition to Planisware's portfolio that complements Enterprise with agile functionality. Overall, the solution

retains a strongly PPM-based approach. Its portfolio management functionality, both from a planning and a tracking perspective, is strong. It also provides good SAFe support. It is somewhat weaker as a team-level tool, especially for Kanban teams. Planisware's integration capabilities have improved but continue to lag behind the market leaders.

Planisware's EAP suite received its highest score for the hybrid project, program and product portfolio use case, thanks to its PPM background. It scored at or near the top of the middle third in all use cases.

Buyers looking for an EAP tool for use in a hybrid or project-centric software engineering environment should consider Planisware.

Planview

Planview's EAP solution consists of two products, Planview Enterprise One and Planview LeanKit, which form an integrated Planview suite.

Planview's EAP suite continues as a leading offering, with outstanding EAP capabilities such as backlog management and prioritization along with strategic alignment and financial analysis to support organizations on their transformation journeys.

The suite offers excellent financial-tracking support, with automated time cards and capex calculations based on the workflow in the tool. This year it has improved upon its already excellent backlog management and prioritization with a "cone of uncertainty" visual for the idea funnel. Its support for SAFe is comprehensive across portfolios, value streams and release trains. The suite offers strong support for collaboration through built-in tools such as Instant Coffee, and external integrations with third-party tools such as Slack and Microsoft Teams. In 2022, Planview plans to keep pace with other leading vendors by offering enhancements to its product roadmapping features as well as innovating with customers through the Planview Labs efforts.

Planview's EAP suite received the highest score for the digital product portfolio and hybrid project, program and product portfolio use cases. Planview also tied for the highest score in the SAFe use case with Digital.ai, providing strong visibility into strategy, finances and results of the work being done.

Buyers looking for a leading EAP tool to support a highly advanced agile enterprise should consider Planview's EAP solution.

ServiceNow

ServiceNow's EAP tool is called IT Business Management (ITBM; soon to be renamed Strategic Portfolio Management).

ITBM is built on the vendor's Now Platform. The combination offers a unified planning and tracking solution for strategic operations and development work.

ServiceNow's ITBM offers a broad set of functionality, including idea management, product roadmapping, project and program portfolio management, and visibility into the value stream. It supports SAFe implementations with epic and feature Kanban boards, product and value stream funding workflows, and remote PI planning using a common board view. It lacks explicit support for retrospectives within the tool, but users can leverage Visual Task Boards to facilitate them. In the past year, ServiceNow has extended the product's integration with third-party tools (such as Azure Pipelines, GitHub Actions, GitLab and Jenkins). Kanban team support lags behind that of the leading vendors, and forecasting capability could be improved to enable better planning. ServiceNow is committed to a quarterly release cycle for product improvements.

ServiceNow's ITBM scored in the middle third for all use cases, due to its good support for portfolio management, funding workflows and financial tracking, and its limited capabilities for Kanban and forecasting.

Siemens

Siemens' EAP tool is Polarion. It is available in two versions: Polarion ALM for on-premises deployment and Polarion X, which is the SaaS option. The two versions have the same functionality.

Siemens' EAP tool provides great support for cyber-physical systems by enabling software delivery at scale and working well with tools used for product life cycle management (PLM). It continues to be well-suited for creating products subject to high-quality standards in regulated industries due to its functionality facilitating audit and traceability. It provides process guidance at various steps, but lacks the modern user experience of products offered by the market leaders.

Siemens' EAP tool supports SAFe through template configuration, portfolio and epic management, solution and release train tracking, and dependency visualization. It provides strong backlog management capabilities with estimates, prioritizations and a dependency tree. It integrates with Siemens' own Teamcenter and third-party tools for PLM and failure mode and effects analysis (FMEA). Polarion integrates well with Jira Software and automation tools such as Jenkins. It offers strong collaboration features, with comments threads, approval workflows and Slack integration. It also offers good visibility to the value stream, through integrations and audit trails.

Siemens' Polarion received its highest score for the SAFe use case, due to its good support for the framework. It scored in the middle third for all use cases, mainly due to its limited support for product roadmapping, Kanban teams and forecasting.

Buyers in the cyber-physical space and in heavily regulated industries seeking an EAP tool with robust support for complexity, compliance and auditing should consider Siemens Polarion.

TCS

The TCS EAP tool solution 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.

TCS supports those adopting agile or scaling agile who want a value-priced SaaS or on-premises solution. Jile, which launched in 2018, is a relatively new product in this market, focused on enabling agile ways of working. Jile supports a product-centric approach to the delivery of solutions and the management of teams and products via a portfolio-based approach.

Jile is cloud-only, hosted in the U.S., the U.K. and in India, while TCS offers MasterCraft DevPlus on-premises or in the India-based TCS Cloud. However, buyers with hybrid portfolios should understand that both tools will be required to manage software delivery. The TCS long-term product roadmap for Jile is ambitious, encompassing enhanced portfolio management, the Jile marketplace, the Jile community, and incorporation of cognitive and other AI technologies. TCS provides integration with GitHub, has partnered with Kovair Software to build APIs for Jira and ServiceNow, and plans more integrations in the future. The Jile marketplace offers plug-ins for integration with CI/CD and testing tools.

TCS's EAP tool received its highest relative positions for the digital and hybrid portfolio capabilities, placing in the middle third. It scored relatively lower for SAFe due to supporting multiple generic scaling configurations with templates, rather than offering explicitly configured SAFe support.

Buyers with hybrid portfolios seeking a complete EAP solution should consider both TCS tools. While Jile is by itself low-priced, Mastercraft DevPlus raises the ante for a complete EAP solution.

Context

This Critical Capabilities report complements Gartner's Magic Quadrant for Enterprise Agile Planning Tools, but has a different emphasis. Magic Quadrants highlight a broad set of criteria that concern corporate viability, vision, marketing and geographic focus. Critical Capabilities reports emphasize product features, rather than the strategic qualities of vendors. Magic Quadrants take a holistic view of vendors to evaluate their commercial ability to gain market share. They also assess how well vendors understand the market's direction, so as to remain viable and relevant. Critical Capabilities reports are specifically product-focused; they examine how features of the vendors' currently shipping products can be applied to important use cases.

Vendors that did not meet our requirements for inclusion in this Critical Capabilities report may nevertheless have strong enterprise-level capabilities, such as product and roadmapping functionality. For information on vendors in this market that do not appear in this document, see the Honorable Mention section of Magic Quadrant for Enterprise Agile Planning Tools.

Many of the SaaS team productivity tools available in the market have basic Kanban and Scrum functionality, but these low-cost tools do not provide full coverage of the critical capabilities and use cases described in this report. We will continue to evaluate these tools to see if they meet the inclusion criteria for a future edition.

Product/Service Class Definition

Agile development methodologies are highly accelerated, iterative development processes. They demand tools that support:

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

- Increased visibility into the flow of work

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

- Collaborative and shift-left practices, such as test-driven development

Additionally, with these methodologies, the principles of collaboration, continuous integration and promoting ownership underpin key product capabilities.

Tools evaluated in this document range from those that support small teams working independently to those that support large portfolios with potentially hundreds of teams. In between are "teams of teams," which are made up of between two and eight teams that may coordinate via a "Scrum of Scrums" meeting, or a product owner (PO) sync or Agile Release Train (ART) sync (both specific to SAFe).

It is very important to select the correct tool or tools to support the different ways of organizing the work done in your organization. (For more information on frameworks for scaling agile to the enterprise level, see Market Guide for Enterprise Agile Frameworks). The tools evaluated in this report have capabilities for planning and collaborating at a team level, and provide functionality that enables scaling across multiple teams. However, we find that it is common to use a federated solution, where data from one or more team-level solutions (usually from Atlassian or Microsoft) is rolled up into a tool to track work across the portfolio.

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

Enterprise-scale agile is a steadily growing mainstream practice, driven by digital business initiatives that demand quick delivery of solutions to new types of problems. The COVID-19 pandemic has driven many IT leaders to seek better organizational adaptability and enabling of a remote workforce. As a result, they have reached for agile and DevOps methodologies and thus are looking for EAP tools. Top-down adoption has also been accelerated by growing client awareness of frameworks, such as SAFe. [2] Additionally, we find many organizations are working in a "mixed mode," with some agile and some waterfall or iterative development initiatives.

Organizations making EAP tool selections must have clear strategies for targeted use and support. While tools provide important functions, these must be aligned with, and supported by, the culture and practices of the organization. Organizations have different requirements (such as for regulatory compliance) that may constrain them to specific practices, or they may face cultural barriers that affect commitments and collaboration. These requirements and barriers, in turn, may evolve as the tools evolve. The less stable or more varied the practices in use at an organization, the greater the need for a tactical approach to tool selection.

Critical Capabilities Definition

Product Roadmapping

Product roadmapping is the ability to plan a set of themes for a product that is undergoing continuous improvement. Roadmapping is essential for organizations organized around a product portfolio model.

Backlog Management

Backlog management in an enterprise agile planning tool is where the short-term and detailed work plans are managed. A backlog is a list of work, ordered by priority and technical risk.

Scrum Team Support

Scrum team support is the ability to gain visibility into and make changes to data about the day-to-day work of a Scrum team, either natively or through integration with another tool from any vendor.

Kanban Team Support

Kanban team support is the ability to gain visibility into and make changes to data about the work of a Lean/Kanban team, either natively or through integration with another tool from any vendor.

EAF Support, Including SAFe

SAFe support includes the processes, roles, and artifacts that enable scaling across teams, and the ability to plan and track work and assess economic benefits using at a minimum Portfolio SAFe in SAFe v. 5.0. EAP tools may support multiple enterprise agile frameworks commonly used in the industry.

Program/Portfolio-Level Planning

Program and portfolio planning is used to support a traditional nonagile portfolio of programs and projects. This can be provided directly or with integration to a PPM tool.

Collaboration

Collaboration tools have the highest value for distributed organizations. These tools can range from virtual boards and team rooms to threaded conversations or advanced, work-item-context chat tools.

Integration With Third-Party Tools

Very few organizations have just one agile or DevOps tool. A high score in this capability indicates that the tool is well-suited to a federated solution.

SW Engineering Financial Management

Financial management refers to the management of measured business outcomes in the software (SW) development process.

Financial management includes the ability to plan and track costs and investments throughout the portfolio of projects and products, to assign KPIs or OKR metrics, and track them through dashboards.

Strategic Alignment and Tracking

In an enterprise agile organization, work is normally aligned and prioritized through strategic directions. The ability to articulate strategies and how they apply to the work in the system is important, as is the measurement of the effectiveness and cost of the strategies.

E2E Visibility to the Value Stream

This capability indicates the tool's ability to show the progress of software throughout the value stream from ideation through to production realization of customer and business value.

In view of the increasing trend toward understanding the full value stream of work to produce customer value, the ability to integrate with and represent status of work in the full value stream is important.

Delivery Forecasting

The ability to track the progress of an agile epic, feature, or release can be used to forecast either the end date via a burn-down chart or the functionality that will be complete via a burn-up chart.

Use Cases

Digital Product Portfolio

The tool is used to plan and track a set of product lines (tribes), each made up of at least two squads or teams assigned long term to a single product set.

Hybrid Project, Program and Product Portfolio

The tool is used to plan and track a large set of 10 or more squads or teams working on a portfolio of projects, programs and/or products.

Both agile and nonagile methodologies need to be supported, either directly or through integration. The ability to plan and manage a hybrid portfolio containing both products and projects and the commensurate complexity of interdependencies and differing success measures is necessary.

Scaled Agile Framework (SAFe)

The tool is able to plan and track work using, at a minimum, Portfolio SAFe, as documented in SAFe version 5.0.

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

- Agile Release Trains

- Program Increments

- Value streams

- Lean Portfolio

Vendors Added and Dropped

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. Also, the vendor did not qualify for this Critical Capabilities as its products do not support any of the three use cases listed in the final inclusion criteria, namely product portfolio, project and program portfolio or SAFe.

Inclusion Criteria

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, and so on) as of 20 October 2021: digital product portfolio; hybrid project, program and product portfolio; and SAFe.

Table 1: Weighting for Critical Capabilities in Use Cases

Critical Capabilities ↓	Digital Product Portfolio ↓	Hybrid Project, Program and Product Portfolio ↓	Scaled Agile Framework (SAFe) ↓
Product Roadmapping	15%	0%	5%
Backlog Management	15%	5%	5%
Scrum Team Support	10%	10%	8%
Kanban Team Support	10%	0%	2%
EAF Support, Including SAFe	0%	0%	40%
Program/Portfolio-Level Planning	0%	30%	0%
Collaboration	15%	15%	15%

Critical Capabilities ↓	Digital Product Portfolio ↓	Hybrid Project, Program and Product Portfolio ↓	Scaled Agile Framework (SAFe) ↓
Integration With Third-Party Tools	5%	10%	5%
SW Engineering Financial Management	5%	10%	5%
Strategic Alignment and Tracking	10%	5%	5%
E2E Visibility to the Value Stream	5%	10%	5%
Delivery Forecasting	10%	5%	5%
As of 30 March 2022			

Source: Gartner (April 2022)

This methodology requires analysts to identify the critical capabilities for a class of products/services. Each capability is then weighed in terms of its relative importance for specific product/service use cases.

Each of the products/services that met our inclusion criteria has been evaluated on the critical capabilities on a scale from 1.0 to 5.0.

Critical Capabilities Rating

Table 2: Product/Service Rating on Critical Capabilities

Critical Capabilities ↓	Apptio ↓	Atlassian ↓	Bee360 ↓	Broadcom ↓	Dig
Product Roadmapping	4.0	4.7	2.0	4.0	4.5
Backlog Management	4.0	4.7	2.0	4.1	4.3
Scrum Team Support	4.0	4.5	1.8	4.3	4.5
Kanban Team Support	4.0	4.0	1.0	4.0	4.3
EAF Support, Including SAFe	4.5	4.5	2.0	4.3	4.6
Program/Portfolio-Level Planning	4.3	4.5	2.8	4.0	4.5
Collaboration	3.5	3.0	2.0	3.5	4.3
Integration With Third-Party Tools	4.0	4.0	2.0	4.0	4.5
SW Engineering Financial Management	4.6	4.5	3.0	4.0	4.0

Critical Capabilities ↓	Apptio ↓	Atlassian ↓	Bee360 ↓	Broadcom ↓	Dig
Strategic Alignment and Tracking	4.0	4.5	3.0	4.0	4.2
E2E Visibility to the Value Stream	4.4	4.0	2.0	4.0	4.4
Delivery Forecasting	3.5	4.2	2.0	3.8	4.6
As of 30 March 2022					

Source: Gartner (April 2022)

Table 3 shows the product/service scores for each use case. The scores, which are generated by multiplying the use-case weightings by the product/service ratings, summarize how well the critical capabilities are met for each use case.

Table 3: Product Score in Use Cases

Use Cases ↓	Apptio ↓	Atlassian ↓	Bee360 ↓	Broadcom ↓	Digital.ai
Digital Product Portfolio	3.93	4.21	2.03	3.95	4.37
Hybrid Project, Program and Product Portfolio	4.09	4.17	2.37	3.95	4.39

Use Cases ↓	Apptio ↓	Atlassian ↓	Bee360 ↓	Broadcom ↓	Digital.ai
Scaled Agile Framework (SAFe)	4.15	4.22	2.06	4.06	4.46
As of 30 March 2022					

Source: Gartner (April 2022)

To determine an overall score for each product/service in the use cases, multiply the ratings in Table 2 by the weightings shown in Table 1.

Evidence

This Critical Capabilities report reflects a broad-based research effort involving:

- Inquiries with Gartner clients about agile and enterprise agile planning tools.

- Discussions with vendors of products in this market.

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

- A process in which each vendor was asked to provide insight into its ability to support the critical capabilities and cover the use cases in a product demonstration.

[1] [15th Annual State of Agile Report,](link) Digital.ai.

[2] The Scaled Agile Framework (SAFe) helps businesses of any size align strategy with execution to manage technology and business portfolios. It incorporates Kanban for portfolio management and Scrum or Kanban for development. Ongoing developments in SAFe are currently focused on lean portfolio management, lean-agile leadership, and enhancing team-based agile software engineering and DevOps practices. The SAFe framework is also widely supported by leading vendors of enterprise agile planning tools.

Critical Capabilities Methodology

This methodology requires analysts to identify the critical capabilities for a class of products or services. Each capability is then weighted in terms of its relative importance for specific product or service use cases. Next, products/services are rated in terms of how well they achieve each of the

critical capabilities. A score that summarizes how well they meet the critical capabilities for each use case is then calculated for each product/service.

"Critical capabilities" are attributes that differentiate products/services in a class in terms of their quality and performance. Gartner recommends that users consider the set of critical capabilities as some of the most important criteria for acquisition decisions.

In defining the product/service category for evaluation, the analyst first identifies the leading uses for the products/services in this market. What needs are end-users looking to fulfill, when considering products/services in this market? Use cases should match common client deployment scenarios. These distinct client scenarios define the Use Cases.

The analyst then identifies the critical capabilities. These capabilities are generalized groups of features commonly required by this class of products/services. Each capability is assigned a level of importance in fulfilling that particular need; some sets of features are more important than others, depending on the use case being evaluated.

Each vendor's product or service is evaluated in terms of how well it delivers each capability, on a five-point scale. These ratings are displayed side-by-side for all vendors, allowing easy comparisons between the different sets of features.

Ratings and summary scores range from 1.0 to 5.0:

1 = Poor or Absent: most or all defined requirements for a capability are not achieved

2 = Fair: some requirements are not achieved

3 = Good: meets requirements

4 = Excellent: meets or exceeds some requirements

5 = Outstanding: significantly exceeds requirements

To determine an overall score for each product in the use cases, the product ratings are multiplied by the weightings to come up with the product score in use cases.

The critical capabilities Gartner has selected do not represent all capabilities for any product; therefore, may not represent those most important for a specific use situation or business objective. Clients should use a critical capabilities analysis as one of several sources of input about a product before making a product/service decision.

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