IDC MarketScape: Worldwide IT Project and Portfolio Management 2019–2020 Vendor Assessment — Coordinating Adaptive DevOps for Digital Innovation

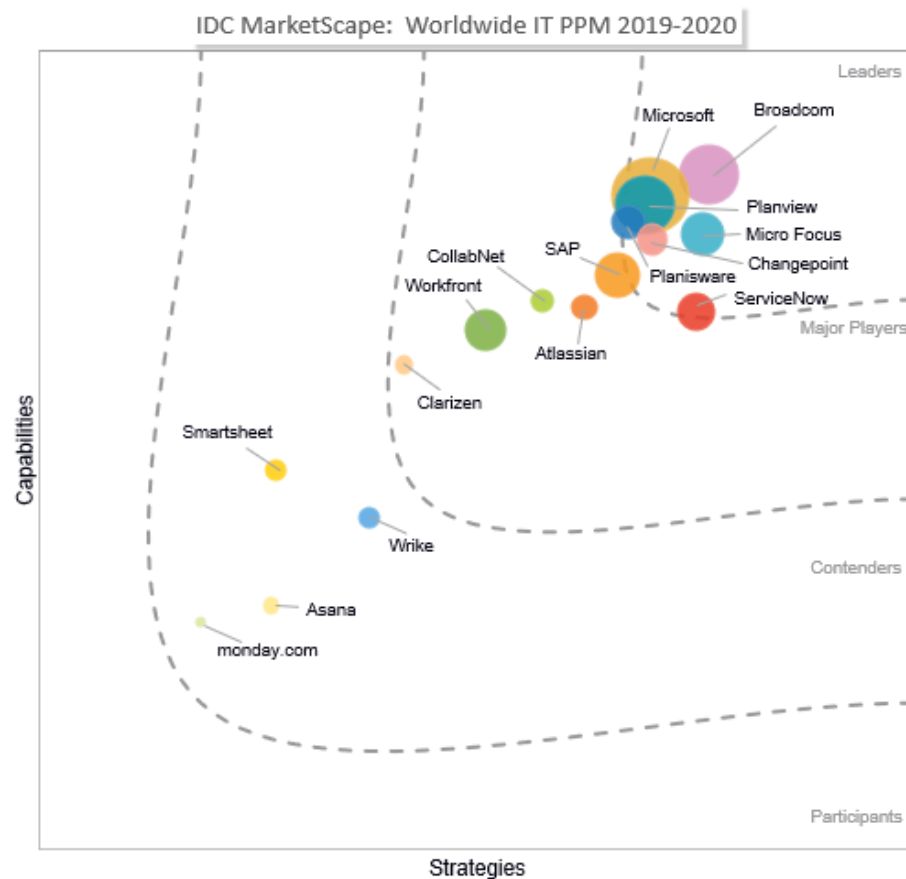Melinda-Carol Ballou

THIS IDC MARKETSCAPE EXCERPT FEATURES: SERVICENOW

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide IT Project and Portfolio Management Vendor Assessment

Source: IDC, 2019

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 IT Project and Portfolio Management 2019-2020 Vendor Assessment – Coordinating Adaptive DevOps for Digital Innovation (Doc # US44483519). 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

High-quality, adaptive, well-performing secure software drives business and digital innovation. Prioritizing projects and programs to deploy applications across mixed, multimodal environments – from mobile to cloud to Internet of Things (IoT) to virtual reality at agile speeds with complex global sourcing, demanding leverage of collaboration and emerging intelligent data analytics with machine learning (ML) and artificial intelligence (AI) – demands a variegated approach to IT project, program, and portfolio management. For this reason, IDC's evaluation criteria for IT project and portfolio management (IT PPM) incorporate breadth and depth across areas for combined IT PPM capabilities as a foundation and also existing and emerging support for an "end to end" application life-cycle approach from IT project initiation through to deployment/DevOps. In addition, it is not sufficient, and it is ineffective, for enterprises to make decisions and manage IT projects, programs, and portfolios in isolation. This study – and three related IDC MarketScape PPM assessments completed in coordination with one another – examines contextualized PPM adoption patterns and trends and how they are impacting business success and PPM solution availability from leading high-end providers and from smaller, innovative PPM and work management-focused vendors. Specifically, key strategy measures for enterprise IT PPM success include:

- High-end IT PPM capabilities' excellence requires broad, deep, and established functionality in core traditional areas for PPM, including project, program, portfolio, process (including scaled agile support), resource, financial, and workflow management, with a demonstrated high percentage of high-end, global deployments (5,000-20,000+ users).

- Successful IT PPM strategies must include key areas such as mobile, cloud and SaaS, agile, deep analytics with intuitive dashboards, scalable architecture, quality, and release management with DevOps coordination. We also see evolving coordination with IT portfolio prioritization for software creation as part of "smarter products" impacting embedded systems and the Internet of Things market. (New product development [NPD] plays a role here and will do so increasingly moving into 2021-2024.)

- IT PPM exists in conjunction with other IT software life-cycle phases and, given the complexity of today's current environments, must act as a base to help coordinate key areas such as requirements and user stories, software change management and version control, continuous release and deploy, and quality, security, and continuous test support to help prioritize and manage IT resource and project allocation and software deployment.

- The demand for IT project and portfolio management solutions in the cloud is the standard increasingly, as private, public, and hybrid clouds become the dominant delivery vehicles for new PPM deployments and a transition point for existing usage. (Deployment in the cloud is rising to become the dominant deployment platform for PPM.)

- IT PPM demands effective process frameworks (including agile), organizational strategy, and also close partner relationships, given the complexity of Global 2000 (G2000) sourcing strategies for application development (AD). Leading vendors leverage relationships with technology and service providers and incorporate strategies for open source solutions as well.
- We are also adding more vendors with intuitive, collaborative work management capabilities to our assessment of IT PPM with this study, as organizations increasingly demand engaging, "modern" task and work management approaches to initiate, cooperatively plan, and execute on IT and other initiatives. However, we see vendors with high-end, traditional enterprise PPM capabilities providing needed capabilities for enterprise IT PPM execution.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

IDC evaluated 16 vendors for inclusion in this 2019-2020 worldwide IDC MarketScape for IT PPM. Vendors needed to have sufficient project, program, and/or portfolio capabilities available. Vendors needed to appear in IDC discussions with end-user clients as part of RFP and other inquiry for enterprise IT PPM during 2019 and should have minimum overall revenue of $10 million for CY18, with at least $5 million of that revenue as IT 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 enterprise IT PPM category based on the strength of their products' overall PPM and IT PPM capabilities, on revenue share in part (as indicators of adoption and staying power), and on differentiated position and capabilities in emerging markets of concern.

ADVICE FOR TECHNOLOGY BUYERS

As has been discussed previously, software drives competitive position and business execution for digital innovation and competitive position. The sheer velocity and complexity for deployment have also impacted leverage of software life cycle with project and program management. We increasingly see broader use of IT PPM in coordination with adaptive, agile application life-cycle management (ALM) solutions for DevOps. These products – which can include requirements and/or user stories, continuous testing, quality analytics, and security, as well as change management, continuous release and continuous deploy, and process management – can help provide granular metrics for the assessment of IT software project delivery and/or delays. These quantitative metrics can provide guidance for both project success and failure and the effectiveness of internal and external resources and service providers being used to execute on IT initiatives. Those metrics then enable adaptive, qualitative choices about risk, compliance, and where additional resources may be needed to troubleshoot challenging, delayed programs. (Typically, the projects with the greatest business value and dynamism involve greater risk and need to be monitored effectively.) These metrics can also help inform choices about internal resources and service providers where outsourcing is a key element for IT portfolio execution. The emergence of ML and AI support by IT PPM vendors to proactively surface PPM data to make it pragmatic and actionable is a core factor for organizations seeking to benefit from information that too frequently remains unused. Advantages include the ability to leverage ML for predictive analytics and to inform improved, adaptive execution.

Implementation of these products remains challenging from a behavioral and organizational perspective. Human beings are wired for consistency more than for change. For companies to

succeed with IT PPM, user buy-in and consistent adoption are key, which demands process and behavioral change. Old and inadequate project and resource data torpedoes successful IT PPM usage by executives, program and project managers, and even the end users themselves as they seek to be collaborative (and must wear multiple hats in the wake of constrained resources).

We see companies approaching this in a variety of ways, based on their needs and maturity. Lightweight solutions with task and work management as on-ramps can be more quickly adopted for small and medium-sized businesses (SMBs). We see these providers "landing and expanding" – starting with initial deployments and then building up adoption. That is why we include a number of those providers as part of this assessment (typically associated with work management, which we will assess in a separate IDC MarketScape document as part of this IDC MarketScape series for PPM). Global enterprise organizations tend to require high-end, functionally broad, and rich IT PPM products. In both contexts, we see many users evaluating and opting for flexible processes with hybrid agile support and flexible delivery models to enable faster adoption (on-demand, hosted and/or, increasingly, cloud). The lack of resources for implementation of these models and the lower immediate costs (typically) are beneficial both for enterprises in general and for those companies with less internal staff to support deployment and maintenance on-premises. Process change is a vital element for adoption, which is facilitated by faster IT PPM uptake. (Long implementation times increase shelfware.) We have seen successful organizations do their own gap assessment and create processes prior to bringing in tools.

A number of organizations have used IT PPM tool adoption as a means to help focus and shift poor project, financial, and ALM processes (via both workflow support and vendor process content) to augment a company's existing approaches and with significant uptake of agile, iterative, and hybrid agile processes. No IT PPM implementation will be useful and successful without good processes; IT PPM automation must be used appropriately as part of the project, program, and portfolio decision making and adaptive execution process. (Executive leadership and evangelism coupled with effective organizational strategies helped set appropriate frameworks for IT PPM process change and automation for 90%+ of the more than 65 user references with whom IDC spoke for the IDC MarketScape for IT PPM analysis during 2019.)

Effective IT PPM enables scalable, high-end portfolio, project, program, and resource coordination needed by global organizations struggling with increased competitive pressures, velocity, and complexity. Increasingly, we have seen a need for coordination (with adaptive process as an on-ramp) with agile and ALM capabilities to feed IT project information with excellent reporting and analytics to enable metrics for executive and team responsiveness, with evolving ML and AI support. The need for visibility into and access to end-to-end software releases and deployment across multimodal platforms is also driving demand for coordination between IT PPM and DevOps capabilities. While we will be evaluating agile PPM capabilities of providers separately, agile and direct, scaled, systemic agile support, and adoption play a role increasingly across end-to-end ALM for DevOps and for business project and program decision making and was also a factor for consideration in this analysis. We have seen PPM vendors add capabilities across these areas, which play a role in the placement of vendors for enterprise IT PPM in this IDC MarketScape.

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.

ServiceNow

ServiceNow is positioned in the Leaders category in the 2019-2020 worldwide IDC MarketScape for IT PPM, given its strategy and leverage of its broadly adopted ITSM and combined platform as part of DevOps, improving PPM capabilities, and solid scaled agile support.

ServiceNow's products being evaluated for this IDC MarketScape series for PPM include Application Portfolio Management, Project Portfolio Management, and Agile Development, the group of products that are part of ServiceNow's IT business management (ITBM) series of applications. Synergistic products that IDC also took into consideration as part of the ServiceNow platform include IT service management and IT operations management.

ServiceNow, founded in 2004 and headquartered in Santa Clara, California, had around 9,929 employees overall as of 3Q19. ServiceNow's ITBM applications include Project Portfolio Management, Time Card Management, Business Planning Portal, Agile Development, Scaled Agile Framework and application portfolio management. The ITBM suite of solutions leverage broad, near-ubiquitous adoption of ServiceNow's common cloud platform, also encompassing IT service management and IT operations management data and synergies for the combined product set; ServiceNow cites high double-digit growth in client uptake of ServiceNow's PPM related products in CY19 so far. Differentiating features for ServiceNow is the uniting cloud platform architecture across its product portfolio. This creates efficiency for users and cross-product coordination, a consistent interface, management, administration, workflow, integration, and data (with CMDB access and data discovery). Cross-product visibility for data including software maintenance, service desk, and product delivery with PPM, time tracking, and agile execution to help align business strategies with current progress are a focus for ServiceNow with its combined product portfolio. Less complexity — along with a platform in the cloud — enables a faster on-ramp to help support consistent uptake and broader adoption.

Company Strategy

ServiceNow's PPM, Agile development, and application portfolio management strategy leverages the near-ubiquitous adoption of its common cloud platform for ITSM and evolves from that basis to encompass PPM, Agile, APM, and other areas. The combined products with ServiceNow's ITBM portfolio bring together project, program, and emerging portfolio management with application portfolio management (as well as time tracking, agile, and SAFe 4.6 support — and plans to support SAFe 5.0 in 1Q20 once it becomes available — and a business planning portal). Along with access to data as part of ITSM and ITOM, ServiceNow offers an engaging opportunity to coordinate current operations information with a PPM and business overlay. This also serves the company well for IT PPM and DevOps-specific implementations to be able to leverage data across the operations side, particularly, and with integration available now for Microsoft's Azure DevOps and Atlassian's Jira and CloudBees' Jenkins to monitor check-ins, tests, and build results. Broad adoption of ServiceNow's successful ITSM product line creates a massive base of existing customers, which laid the groundwork for significant 2019 (and prior) growth for ServiceNow's customers for PPM and Agile as well as for its APM products, as ServiceNow evolves additional functionality. Another benefit of combining a platform on which the organization has already standardized for ITSM is the opportunity to reduce shadow IT.

From 3Q18 to 3Q19 ServiceNow increased its sales team and channel partners, which both supported adoption during this time frame and helped feed growth. The company is in the process of engaging additional agile and SAFe-centric partners as the company has strengthened capabilities for agile and hybrid project execution.

The "New York" release for ServiceNow's ITBM platform shipped in 3Q19 included additional agile capabilities, such as story and story board menu options, epic rollups, and sprint details updates as well as task updates, Agile development integration with Project and PPM, test management integration with Project, mobile project status, enhanced resource allocation workbench, and resource and capacity and group capacity update.

With Common Service Data Model (CDSM), ServiceNow is seeking to be more proscriptive about how data is organized and is looking to help establish this as an industry standard. In evolving releases, ServiceNow is focusing also on idea management, seeking to enable users to capture lighter-weight ideas, categorize them, and then let users collaborate and vote, to move beyond enhancements and feature requests to ideas that can be converted to any planning object on the platform and expanding on its approach for demand creation.

ServiceNow enables customers to combine waterfall, agile, and hybrid approaches for project workspaces, which can be waterfall with tasks and resources, or Scrum or Kanban with user stories, burndown charts and backlog plans, or a combination of both or managed as a SAFe Agile Release Train (ART). For instance, users can examine the backlog in their agile model and can bring in stories and tasks across the platform to create prioritized sprint planning, and/or can flip from user stories to features and feature dependencies. Current ITBM releases added more analytics for Scrum and SAFe, including "burn up" and velocity charts, work in progress (WIP), and greater work visibility, including a SAFe program board, which lets users manage multiple teams on different sprint schedules, doing work toward value streams or programs, to manage the dependencies and team capacity versus all other work, and for less structured agile environments to manage a program across different work execution types.

ServiceNow has also released investment funding to enable organizations to fund more continuously across different kinds of initiatives, from projects to agile release trains to products, from story levels to program increments. The company's intent is to be able to request initiatives from a "bottom up" as well as top-down approach to create a portfolio of work investments for teams, strategies, and/or products. (IDC sees organizations with higher levels of agile maturity seeking to fund agile release trains; ServiceNow is working to create support for those capabilities.)

Application portfolio management enables visibility into current application assets across silos and systems. This can be useful in providing control with visibility and a more complete picture of existing software assets to help determine sunset or replacement decisions on existing software. APM can inform better decision making about the current project portfolio by reducing redundancies and prioritizing business-critical applications. This is a growth area, with customer demand as companies seek to deal with resource constraints, software velocity demands, technology complexity, an economy that remains volatile, cross-product leverage, M&A, and partner and third-party integration strategies. ServiceNow's APM capabilities use data in the CMDB to help with the classification of applications and initial support for inventory input.

ServiceNow offers out-of-the-box fields for capturing business applications and processes to help guide users to collect software asset management data (e.g., user assessments, business criticality,

stored information, license and usage info, new feature needs, end of life, and the ability to bring in data from related ServiceNow products in regard to server upgrade options, risk and compliance, etc.). ServiceNow's APM intent is to become the hub for everything related to the application and tying that back into planning and an overall application road map.

Overall, IDC sees ServiceNow's differentiation in its combined cloud platform across related areas for customer execution, emerging capabilities across core areas for PPM, Agile, and APM for our IDC MarketScape series for PPM.

Strengths

ServiceNow's combined platform and excellent execution across its ITSM strategy enable a strong foundation for leverage by ITBM for PPM, APM, and agile. As organizations seek to move beyond service desk and change requests to broader programs, portfolios, epics, and/or tasks and user stories that encompass business and other initiatives, ServiceNow positions itself to supply those capabilities. The ability to leverage ITSM data as part of application portfolio management differentiates ServiceNow by enabling access to rich and broad information about organizations' existing application portfolio as they seek to rectify, prioritize, and leverage existing and emerging software initiatives as part of digital optimization and core competitive and business strategies. Updated product releases have strengthened ServiceNow's functionality for PPM, APM, and agile, specifically (moving beyond limited, initial PPM features that shipped with early versions of the product). With each successive release, ServiceNow has focused on areas to improve functionality for agile, APM, and PPM, including hybrid agile and waterfall approaches, and variegated investment capabilities and emerging financial management for product, project, and agile value streams. We expect this to continue moving into 2020-2021. References spoke about improved prioritization and execution efficiency with visibility across a common platform, enabling prioritization of key business initiatives, and welcomed the capabilities in the current New York release for investment funding, mobile, and other areas.

Challenges

ServiceNow is primarily known for its ITSM capabilities and although this is shifting gradually, awareness remains bounded about the company's PPM capabilities and focus. Organizations typically learn about ServiceNow's PPM, Agile, and APM product line through existing use and/or engagement with ITSM. High growth rates (for both ITSM/ITOM and ITBM) such as those experienced by the organization over consecutive years are challenging to maintain and require focus, potentially via additional acquisitions (and integrations) and ongoing pressure. From a PPM perspective, despite improvements, ServiceNow still lags behind high-end enterprise PPM competitors for providing deep and functionally rich capabilities in areas of portfolio management for instance. While its agile capabilities have improved significantly and is another area of investment, continued execution and expansion remain an area of opportunity (ServiceNow currently supports SAFe 4.6). ServiceNow references with whom IDC spoke are seeking stronger reporting, deeper and fuller strategic planning, road mapping and analytics, improved portfolio management and resource management, and time to market. IDC also sees a key role for machine learning and artificial intelligence for PPM moving into 2020-2021, but ServiceNow's strategy here is unclear. ServiceNow says that the company will begin to leverage ML/AI capabilities in its Orlando release to help customers find similar ideas via a new Innovation Portal. All of these areas are both challenges and also opportunities for stronger execution from ServiceNow.

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

IT PPM software represents a competitive submarket of the larger project and portfolio management functional market. We are now also including a small portion of revenue from agile and providers with revenue in the software change, configuration, and process management (SCCPM) market; SCCPM agile software is also being increasingly leveraged for use in managing IT PPM initiatives and also Team Collaborative Applications (for collaboration). Therefore, IT PPM now also includes agile process and methodology management capabilities from the SCCPM market, and for an intuitive on-ramp, ease of engagement, and collaboration with team management capabilities, we are also including vendors with presence and revenue in Team Collaborative Applications.

Project and portfolio management applications are used for defining, estimating, tracking, and optimizing the tasks and resources required to plan and complete a project as well as to manage the portfolio of an enterprise's body of projects, including "what-if" analysis on proposed projects. PPM applications track resources (usually materials and labor) by project, analyze resource constraints and project timelines, and present schedule- and resource-based analytics. Where PPM offers project accounting in its package versus as part of a financial applications package, the revenue associated with the sale of that package is attributed to PPM rather than financial applications. PPM solutions find their way into a wide variety of industries and business functions, including construction management,

business/professional services automation (PSA), large-scale product development projects that result in manufacturing processes, and informal marketing campaigns.

IT PPM represents a cross-industry usage of PPM technologies meant to augment the effectiveness of IT departments to enable more adaptive business approaches. In the early 2000s, the use of PPM by IT departments continued to grow because of the addition of portfolio management features, which were beginning to give IT managers and CIOs better visibility into their operations as well as into budgetary and resource utilization.

IT PPM tools facilitate joint business/IT planning. These products provide portfolio visibility into IT projects, programs, and resource allocations and costs in conjunction with expected business value to enable effective prioritization. Product functionality encompasses a suite of primary capabilities that include project, program, resource, portfolio, process, demand, workflow, and cost/budgetary management for IT. The IT PPM market includes software revenue from IT end-user organizations and consultancies/outsourcers that use IT PPM tools to manage the portfolio of IT projects and IT programs. Given that overlap, revenue for IT PPM (in some instances noted in this document) will be shared across the professional services automation segment of the PPM and IT PPM segments. These tools represent a subset of the overall product, project, and portfolio management tools market that IDC sizes and forecasts. The objectives of IT PPM tools are as follows:

- **Enablement of adaptive, complex IT/business decision making.** The costs of lack of visibility into existing projects, programs, and resources and the lack of understanding of resource redeployment are visceral. IT PPM tools are designed to solve complex multidimensional problems and seek optimized solutions based on user-supplied data such as business needs, with associated value and risk, tasks, policy, and rules. ML and AI increasingly play a role for effective, pragmatic leverage of PPM data and predictive analytics.

- **Alignment of business goals and IT goals.** IT PPM tools, by virtue of the discovery and analysis process they enable, facilitate collaboration about and coalescence of objectives, policies, rules, and processes between IT and business staff. The ability to leverage effective decision making to invest in core initiatives is critical during a time of economic challenge, with scarce resources resulting from layoffs and business contraction and also as reinvestment occurs. IT PPM enables companies to cut waste and focus resources on the areas of greatest organizational and competitive need for business adaptability (key in global markets particularly).

- **Support for IT governance.** Regulatory and board-mandated compliance requirements demand the ability to document, audit, and explain corporate actions. The role of IT PPM in decision making and optimization can support a comprehensive IT governance solution. IT governance also encompasses coordination between the IT project portfolio and the IT asset portfolio, typically known as DevOps. Increasingly, IDC sees a focus on project and asset portfolio coordination, particularly from CA Technologies and HPE and emerging from Microsoft.

- **Management of outsourcing.** The need to better manage outsourced and offshore resources in conjunction with internal staff is a key driver for IT PPM. Resource and project management challenges alone are daunting in that context. In addition, with more specialized application life-cycle management (ALM) vendors in this space, the ability to drive qualitative analysis based on quantitative metrics (e.g., testing and change management responsiveness) enables greater management visibility into experience levels and staff capabilities. This can improve decision making on the part of IT management with regard to internal and external sourcing. Exemplifying this trend are Microsoft with Visual Studio 2013 evolving in 2H15 beyond its

earlier integration between Microsoft Project Professional and Visual Studio; CA Technologies' potential leverage of integration between the company's change management and service management tools; and HPE's integration between HPE's PPM, Quality Center, Agile Manager, and service management solutions.

IT PPM tools are a key aspect of an overall end-to-end IT life-cycle management or DevOps solution. DevOps encompasses all IT activities that are associated with the decision making, development (requirements, planning, development, change management and testing, deployment, and maintenance), and operation (monitoring and management) of IT assets. Acquisitions of DevOps-related companies such as Nolio (by CA Technologies) and partnerships with others exemplify opportunities in this arena, which must encompass not only release management but a broader end-to-end life-cycle approach. Coordination of IT PPM with application development (AD) life-cycle tools enables users to leverage quantitative data locked up in testing and change management to make qualitative assessments about project and program success. It also enables the proactive prioritization of highly constrained internal and outsourced resources. Consequently, IT PPM is key in supporting the decision making and oversight that enable an organization to make the right, most adaptive choices regarding the development of IT assets.

LEARN MORE

Related Research

- *IDC MarketScape: Worldwide Agile Project and Portfolio Management 2020 Vendor Assessment – Enabling Business Velocity for Digital Innovation* (IDC #US44483219, January 2020)

- *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 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 IT project and portfolio management (IT PPM) market. This research enables analysis of quantitative and qualitative characteristics to provide metrics and context for users evaluating solutions in this area and also 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 broad, functionally deep enterprise IT PPM functionality, with established, significant numbers of high-end, 5,000-10,000+ user deployments. In addition, we are seeing the coupling of agile processes and end-to-end DevOps application life-cycle management capabilities and strong analytics and data leverage with evolving machine learning (ML) and artificial intelligence (AI) for IT PPM. These emerging capabilities help support actionable metrics, iterative processes, and growing demand for complex, multimodal deployments and DevOps, from cloud to mobile and embedded and IoT. Metrics with analytics based on this data can help provide visibility 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 with forthcoming assessments for agile PPM, cloud PPM, and work management, which enable three additional weighted IDC MarketScape views (for a total of four distinct IDC MarketScape PPM vendor evaluations).

"IDC continues to see adoption of enterprise IT PPM solutions for deep functionality and management of multifaceted, distributed IT projects, programs, and portfolios via automation to enable complex sourcing and dynamically changing and especially complex DevOps initiatives," said Melinda Ballou, research director for IDC's Agile ALM, Quality and Portfolio Strategies service. "Complementing these capabilities, we observe a need for a collaborative, intuitive on-ramp on the one hand, and coordinated hybrid and scaled agile with end-to-end DevOps approaches with IT PPM helping focus teams with targeted execution, cutting delays to benefit, and improving metrics and analytics with evolving ML/AI capabilities on the other. 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 the cloud to facilitate the handoff from project inception to execution development to deployment (as well as DevOps for IT software project portfolios) also brings key benefits."

About IDC

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