

MarketScope for Application Life Cycle Management

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Organizations adopting agile practices, utilizing globally distributed teams, or exploiting complex processes and technologies are most likely to benefit from using ALM tools to plan, manage and report on their development activities. This MarketScope assesses the market offerings and their providers.

WHAT YOU NEED TO KNOW

Organizations are under pressure to accelerate the speed of delivery of increasingly complex applications, while improving overall productivity and quality. Organizations are adding packages, business process management suites, externally provided services and other new delivery vehicles to their range of options. These are being combined with legacy technologies, often built by virtual teams spread around the globe. Audit and oversight demands continue to grow in both regulated and nonregulated environments. These needs for greater governance often adversely affect productivity. Efficient coordination and automation of the delivery process requires new, collaborative approaches to the planning, measurement, execution, control and reporting of activities. These new approaches are what differentiate current application life cycle management (ALM) tools, and what make ALM processes vital to leading-edge development activities.

MARKETSCOPE

IT organizations are under pressure to consistently deliver projects and to coordinate a variety of projects combined into large initiatives. Coordinating across teams and automating workflows requires a focus on management and governance. Development is often run on manual processes and paper-based systems of record, depending upon heroic behavior from a handful of individuals to guarantee project success. This introduces a great deal of friction into the application delivery and maintenance pipelines, producing dissatisfaction from both the IT group and users. Point tools make it hard to collaborate, and hinder efficient communication among stakeholders. ALM solutions are evolving to enable enhanced planning, measurement, control and reporting of activities in all the stages of all the various application delivery life cycles. While initial solutions were single-vendor conglomerations, products are evolving to become more open and to coordinate a wider scope of activities.

ALM suites have promised improved automation and integrated approaches to the delivery of applications, but often fall short of the vision. While users are seeking ways to coordinate work and share data across phases and activities, which include requirements definition and management, different testing activities (including test case management), software changes and configuration management, they often have process enactment tools for the various major activities and are seeding solutions that don't require a rip-and-replace approach. Clients are resisting the tendency of product suppliers to apply the ALM term broadly to include functions focused on project execution, recognizing that the suites of application tools of the past 10 years fall short in their ability to maintain consistent and complete views across many process steps.

Leading solutions are transitioning to support a federated repository approach that allows specific implementation tools (compilers, debuggers, modeling tools) to share information about artifacts; a workflow system that describes the (sometimes quite messy) sequence of activities required to design, develop, and deploy the artifact; and a data warehouse that enables the capture of information about practices so that they can be repeated. Although ALM includes the management of specific phases – requirements, design, test – it is the extension of unified workflow and management across these phases that is the key element of ALM. The emergence of SOA architectures is enabling this evolution through the use of XML, REST and RSS.

Benefits – What Do You Get From ALM Implementations?

Three principal values can be expected from ALM adoption:

- **Enhanced management transparency and visibility.** This entails common metadata and workflow models that allow the functions of planning, measurement, control and reporting to be performed easily across the many phases, activities and roles within the process of development.
- **Effective execution of challenging processes.** Application organizations find new challenges in many directions. Teams often are geographically distributed. They may span multiple enterprises, and include vendors, partners and clients. The life cycles to be supported will vary across projects, but several different cycles may need to come together in concert to support multitier or multi-enterprise needs. Delivery mechanisms are increasingly heterogeneous. Service architectures, Web architectures, software as a service and cloud platforms all offer new variations of process architecture and tools that will need to be mastered. Despite all these new constraints and complications, the business needs the results more quickly and with better quality. These benefits result in better control of costs and risks in development projects across the spectrum of applications. Savings also stem from the reduction of unnecessary rework and better alignment of projects with business needs. The understanding created by ALM improves the interactions with both project and operational teams, and accelerates emerging integrations with these domains.
- **Better results to the business.** The business needs consistent and predictable delivery. This is not just meeting schedules and budgets. This is meeting the real needs of the users, even those that have become known during the development and delivery, and meeting those needs with acceptable adherence to deadlines and budgets.

Market/Market Segment Description

ALM encompasses the practices, processes and tools that aid in the management of the application development life cycle, specifically the workflow and artifacts associated with producing or maintaining a custom software application. Key capabilities include change management, workflow and work item management, and an integration backplane that allows an organization to establish traceability and accountability across multiple processes, multiple locations, multiple tool types, and multiple tools of each type across the stages of development and delivery. Note that as solutions evolve, they gain better coordination with project and portfolio management (PPM) and IT service management (ITSM) tools.

In addition to the general facilities mentioned, ALM offerings also should include at least a portion of the set of tools that support planning, measurement, control and reporting roles in the application life cycle. The principal tools that are included play management roles: requirements management, source code change, version and configuration management, build management, quality management, metadata management, and some sort of reporting facilities, often based on a specialized data mart.

Adoption of ALM brings substantial benefits in four particular situations. We see at least one of these factors justifying virtually all significant ALM deployments. These situations are: deployment of agile methods, geographically distributed development teams, situations requiring complex processes (often in regulated industries), and situations where products are complex and have many variants – for example, where there are multiple sources of requirements and multiple delivery platforms to be supported by common software.

The vendors addressing this market fall into three groups, having adopted approaches that exploit their particular strengths or brand awareness among application development (AD) practitioners. The integrated development environment (IDE) vendors, led by IBM and Microsoft (and including less-significant contributors like Oracle and Atlassian), are striving to maintain their current place in the market and transform clients into an installed base for their visions of comprehensive ALM. Vendors with strong positions in point tools (for example, requirements, software change and configuration management, testing or project management) are building from those bases, and while accommodating other tools, often focus on preserving their installed point tools. Finally, there are a group of emerging vendors who have focused on process enablement and collaboration. Most of these have focused on the various agile and lean methodologies, but others are providing general-purpose, process-neutral management engines.

Additionally, integrations are emerging that leverage PPM or operations management functions to deliver planning and control functionality that overlaps the ALM characteristics we've highlighted. Similarly, ALM tools are adding more project management, delivery and distribution functions. We expect these overlaps to continue to grow, and for a higher-level class of IT planning and control offerings to emerge. This trend is discussed more fully in "Flying on Instruments: The IT Planning and Control Panel" and "DevOps: Born in the Cloud and Coming to the Enterprise."

Underlying version and configuration management functions are not as much of a driver for these solutions as they once were. Good, basic functionality is provided by Subversion, the most popular open-source tool, and it is often supported in addition to the vendor's own store. Clients seeking higher performance and more-sophisticated release handling will want to consider tools like Perforce Software, AccuRev or Plastic SCM. Distributed version control systems (DVCSs) like the open-source Git and Mercurial are emerging as alternatives, but currently lack features needed for broad enterprise use.

As organizations evaluate solutions, they must take into account the mix of products, the types of projects, and the individuals involved from a skills and roles perspective, as well as from a sourcing perspective. The ALM tools in this MarketScope are evolving rapidly as they add functionality and build partnerships. They are also evolving through market consolidation. Many are moving from the traditional "buy my complete stack" approach to one that recognizes the need to integrate with other products in a deeper, more-meaningful fashion than traditional application programming interface (API)-level, menu-driven, manual synchronizing or artifacts.

Another key value that can be delivered by ALM tools is a real-time view of the project status. This eliminates the need to manually collect data and build reports that are invariably outdated by the time they are delivered. Leading solutions can synthesize data not only from the tool, but from integrated components, and they can do so without the need to run a manual synchronization step. They allow team members to simply go to the reporting portal and view the information.

Inclusion and Exclusion Criteria

To be included in this MarketScope as an ALM tool, offerings must:

- Support two or more of the following management domains:
 - Requirements
 - Change, version and configuration
 - Quality
 - Build
 - Distribution
- Facilitate distributed team activities
- Support customizable workflows that can draw on team definitions and permissions
- Manage change process workflows from initial change requests or requirements through build and turnover for release
- Vary workflows for development processes from team to team and from project to project
- Share data across phases and activities
- Support federated sharing or central storage of metadata for the development resources and processes
- Support custom reporting and custom integrations beyond those of the vendor
- Manage work items and developer actions down to individual edits made through editors or IDEs
- Be generally available
- Have been the subject of client inquiry during the past year
- Have at least three reference clients in production
- Must be distributed in multiple national markets
- Commercial support must be available

The integration of ALM products with project and application portfolio management tools is useful, but, as of yet, is not a core selection criteria. Similarly, integration with software distribution facilities or other operational tools is not yet heavily weighted. Some project management tasks can be done in ALM tools. These functions will not necessarily do what a project management tool will do, but will target the needs of some subset of method and project size. Another interesting integration for demand management would be in the form of connecting to a help desk/service desk (BMC Remedy for example), because change tickets are often the initiator of a project.

The majority of the products covered in this MarketScope are custom-development-focused and platform-neutral, with the ability to support both Java and .NET projects. Products are not excluded based on platform coverage, but this is a key client selection criterion. If a mixture of platforms is in play and the teams are not completely autonomous, then it is preferable to have a single ALM solution that works for all the selected platforms, or systems that can pass information back and forth effectively. While ALM tooling can be common, we still expect the execution stacks to remain specialized, so there will be different sets of design, construction, test and build tools for Java, .NET and other major target environments. Mobile development is one notable departure from this approach, with lots of cross-platform tools (that do cross-compilation) appearing.

We have excluded ALM offerings that are package-focused. Specialized ALM facilities, emerging for major ERP environments like those of SAP and Oracle, need to be considered separately. SAP clients should explore SAP ALM and offerings from companies like RealTech, Revelation Software Concepts, Panaya or IntelliCorp. Oracle users can explore companies like Quest Software, Unitask and Phire. No single offering is capable of addressing ALM needs in both custom-developed and package environments at this time.

We also excluded offerings that required a significant amount of custom programming services to complete.

A number of products have some ALM capabilities, but failed to meet one or more of the above criteria, so they were excluded (see Note 1 for a partial list of these products).

Rating for Overall Market/Market Segment

Overall Market Rating: Positive

The adoption of ALM recovered quickly from the recession because organizations needed to improve efficiency across teams, and needed to build and sustain engineering productivity. Most companies were doing one or two things, but not following a comprehensive ALM approach. The need to support rapid iteration and improve collaboration is showing organizations the value of ALM.

A majority of adopters of ALM products fall into one of four situations: agile teams, geographically distributed projects, complex processes or complex products. Clients are rarely starting with a vision of massive enterprise deployment. Many of the products evaluated in this market are evolutions of siloed solutions. Consequently, we see initial deployments proving the concepts, then moving to viral adoption and broader build-out (for example, requirements management may be deployed first, then test management and the connection of requirements to test cases).

Incremental adoption – the evolution from silos to ALM solutions – means that most companies have several overlapping ALM solutions rather than one. This reality reinforces the need for tools to work together and for solutions that bridge across the silos with workflow, reporting, etc. Furthermore, most companies will continue to need a mixture of application development solutions. The more diverse your business and technology, the more diverse the tools you will need to support delivery. Evaluations should place a high value on tool-to-tool integration mechanisms using XML and REST or broadly adopted proprietary mechanisms.

The ALM market, about \$1.4 billion for calendar year 2009, has historically had a growth rate of about 8%. Growth was significantly affected by the downturn in the economy last year, but the impact was mostly seen during the last quarter of 2008 and the first two quarters of 2009. While sales have generally recovered, certain older, larger products have lagged. Smaller, innovative companies which tend to have lower-priced or software-as-a-service (SaaS)-style offerings are benefiting more as buyers try to do more with less.

Tool providers that don't have solid cash flow will be challenged, and we expect product withdrawals and further acquisitions. Organizations should request source escrow clauses to ensure access to the tool source code if the provider fails, but also recognize that the complexity of these solutions will seriously challenge internal IT teams' ability to maintain the tools if the

escrow conditions ever need to be exercised. Companies with flexible price models and options, such as hosted solutions, will have an advantage. Open-source alternatives to the products covered in this MarketScope have yet to emerge. Many of the commercial offerings support a variety of open-source components, leveraging the capabilities of products such as Subversion. Open-source components, therefore, potentially replace commercial pieces of the ALM ecosystem. Furthermore, technical barriers to open-source ALM will continue to drop, with viable open-source ALM offerings emerging within the next three years. Broader deployment of ALM in conservative development organizations beyond the four areas we've discussed will be slow until open-source and SaaS alternatives begin to reduce the cost of acquisition and deployment. At about the same time, maturing commercial products with better integration to project and operational tooling will also accelerate deployment and growth.

Agile shops form a significant market for the lighter versions of ALM offerings. ALM is what enables sustainable agile practices. ALM creates a management framework providing consistent, auditable records of the decisions and activities of agile teams. The collection of stories, and the pulse of the agile team's change and development activities form a sort of team memory. Collaborative and workflow orientation in the newer tools suit the agile practices and avoid some of the implicit process "straight jackets" that teams fear.

While some offerings today are particularly specialized for Agile, ALM products that can't accommodate a variety of methods, processes or project styles are unlikely to find broad long-term acceptance in large enterprises. We expect to find aspects of Agile practices and aspects of waterfall methodology, as well as other styles, accommodated by most products within the next two years. Most organizations will have a mixture of Agile and more-traditional projects. Most companies will need to coordinate between an Agile development organization and "non-Agile" operations and project management office (PMO) organizations. Team needs will evolve with changes in the mixtures of methods and tools, and the ALM solutions will have to be durable and support those changes.

Developers of complex products (for example, embedded systems in the appliance, automotive or aerospace industries) are another significant group of adopters. Much of the attraction here is related to the management of complex requirements and complex variants in product configuration and deployment. A common software framework may be supporting many devices, and the development team must manage the unfolding complexity of the evolving hardware. There may be large-scale projects, integrating hundreds of elements, and the collation and management of the parallel streams of development become critical due to the sheer volume of items on the one hand, and the costs or consequences of errors on the other. The burden of variant complexity is such that this segment can find value in driving its teams to use a common set of tools and processes, rather than permitting the variety more common to commercial IT.

Geographically distributed development requires complex communication of the project's progress from location to location, and the management of distributed contributions to a common core of code. In particularly challenging cases, geographically introduced complexity is found with the complexity of multiple target platforms, and ALM's abilities become even more vital. ALM delivers value in any place where improved collaboration is

needed. Well-implemented ALM enables agile processes to be used among geographically separated teams. Any latency between when a change occurs and when the team as a whole has the new information reduces development effectiveness, slowing activity and, at the worst, requiring reducing quality or requiring rework.

Process-centric shops are another beneficiary of the workflow and process discipline in ALM offerings. These may be technical development shops, particularly those involved with the development of software with critical performance requirements (for example, flight safety demands). They also may be in regulated industries, such as pharmaceuticals, where statutory requirements for processes justify the investment in ALM.

Currently, the majority of organizations are still not procuring tools from an integrated ALM perspective. This is generally because a specific group needs a specific set of functionality, and there isn't a concerted effort to get the entire IT organization onboard with a single integrated product. However, we are seeing vendors get a foot in the door with one group, and then expand their presence. Generally, however, most organizations have a large economic barrier to buying a solution just to gain integration, especially if it requires switching out existing preferred solutions. Thus most buying is a gap-filling exercise: improve requirements, support a specific development process or replace an existing tool that is not meeting needs. Broad adoption of ALM will require significant organizational change. Adoption among the larger

population of organizations will require them to adopt disciplined execution processes in a number of phases of the development cycle. As evidence of ALM effectiveness accumulates, these cultural changes will seem forbidding, and broader deployments will accelerate. Until then, we expect mainstream process improvement initiatives to continue to focus on implementing point offerings in test management, requirements elicitation and management, and other similar processes.

Market Conditions

In an early stage market, the MarketScope ratings reflect our assessment of vendors' prospects of executing in their selected domains. Clients need to focus on the subset of vendors that addresses their particular needs and their desired solution architectures.

Because of recent economic conditions, clients have been placing more emphasis on company viability and access to financing. This was reflected by increasing the weight of overall viability this year, as compared with 2008. That is the most significant change in criteria. Current economic conditions favor vendors that have access to cash or lines of credit, to enable continued growth and investment in R&D.

Within the next three years, we expect offerings to mature, and to begin to see a rationalization through mergers and acquisitions, focus on market niches and exits from the market. While some vendors will better their positions, others will begin to fall behind.

Evaluation Criteria

Table 1. Evaluation Criteria

Evaluation Criteria	Comment	Weighting
Overall Viability (Business Unit, Financial, Strategy, Organization)	Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.	high
Market Understanding	Ability of the vendor to understand buyers' wants and needs, and translate those needs into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.	high
Offering (Product) Strategy	The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.	standard
Product/Service	Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets and skills, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.	standard
Sales Execution/Pricing	The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.	standard
Customer Experience	Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways that customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), the availability of user groups, service-level agreements and so on.	standard

Source: Gartner (November 2010)

Figure 1. MarketScope for Application Life Cycle Management

	RATING				
	Strong Negative	Caution	Promising	Positive	Strong Positive
AccuRev			X		
Aldon			X		
Atlassian				X	
CollabNet				X	
Digite			X		
HP				X	
IBM					X
Kovair			X		
Micro Focus			X		
Microsoft				X	
MKS				X	
Parasoft			X		
Polarian Software			X		
Rally Software				X	
Seapine Software			X		
Serena Software				X	
SmartBear Software			X		
TechExcel			X		
ThoughtWorks			X		
VersionOne				X	

As of 11 November 2010

Source: Gartner (November 2010)

Vendor Product/Service Analysis

AccuRev

AccuRev's core version and configuration offering is often encountered as an underpinning of successful best-of-breed ALM solutions. Its administrative overhead, innovative functionality (including its stream-based model and built-in, issue-based change package development), ease of use and price make it a sound alternative to the offerings of IBM and Serena Software, and to the open-source Subversion. AccuRev is particularly helpful for large, geographically distributed, complex software development teams.

Early in 2010, Rally Software, Urbancode and AccuRev formalized an offering that had become an important de facto part of all three companies' product sales. Branded as AgileCycle, this is a fully integrated ALM product suite emphasizing agile approaches to project management, configuration and process management, continuous integration, and deployment to production. This is a hybrid solution, with Rally Software delivering principally as a SaaS product, while the rest of the offering is usually on-premises.

While all three products have been successful in the agile space, they also either have or are developing features to broaden the solution to accommodate waterfall approaches within the same organization. Good integrations are available to HP Quality Center and the commonly available development environments.

Prepackaging the combination of products will improve time to value and integration of processes. The combination of mentoring and consulting for Rally on the strong version/configuration and build platforms of the others opens a group of accounts that have more-complex needs than any one of these companies were addressing individually. AccuRev's built-in functionality helps AgileCycle address large, geographically distributed, complex software development teams. Installations we're aware of mostly predate the formal agreement, but have shown good productivity and successful delivery.

Organizations that are seeking to move to broad adoption of agile within the enterprise will be attracted by the breadth of the solution. Speed of deployment, continuing evolution and consistent support should differentiate this offering from homegrown solutions, particularly with clients who don't want to directly support open-source components. Adherence to agile principles, coupled with

lower administrative costs and strong, broad functionality, will compare favorably with the offerings of better-known providers (such as IBM, Microsoft and HP).

Rating: Promising

Aldon

Aldon has a 20-year heritage serving demanding enterprise-scale customers. This shows through in its customer base, which is focused primarily on the tasks of change management. The Aldon tool exploits a common repository, and the company broadly supports both ALM tasks, as well as release and service management. Matching with this is Aldon's focus on supporting traditional processes, and the company provides a number of compliance and industry-specific solutions. This includes Information Technology Infrastructure Library (ITIL), Capability Maturity Model Integrated (CMMI) and Sarbanes-Oxley solutions. The strong change management foundation also comes through in the strong facilities for managing multiple releases, which recognizes that projects don't just start and end, they have maintenance releases.

The Aldon solution best fits teams with complex processes working relatively conventional development methodologies. It appeals to regulated organizations, or to those that need broad multiplatform server support. There is expanding support for teams that are working to shift to an agile process. Aldon doesn't have tools for requirements, but has introduced facilities for test case management. Reporting and analytic tools are good for the core elements, but are limited by the lack of integrations to requirements and testing. However, Aldon's configuration and software distribution function facilitates impact analysis and close integration with operations processes. The products are targeted toward companies that want to have efficiency and that require strong governance and compliance.

Aldon's challenges are to build better brand recognition and expand its sales presence. Aldon has good capabilities for global support, and has a significant customer base into which to sell.

Rating: Promising

Atlassian

Atlassian seeks to enable rapid economical development of solutions in flat self-organizing teams. It has established a low price point for enterprise licensing and serious tools on any budget. The company has built around Jira and Confluence, its most popular products, and has added innovative developer collaboration features like activity streams, OpenSocial Dashboards, Google Apps integration and wallboards. It maintains a rapid agile release schedule (one to three months per iteration). Just as significantly, Atlassian has resisted developing integrations to enterprise PPM tools or to enterprise operations tools. It pursues a low-cost, low-touch sales model.

Atlassian offers a hosted offering – Jira Studio – as well as an ever-broadening group of point products across the development process. The company supports access from Visual Studio, Eclipse and IntelliJ IDEA. Common third-party development and test tools are also supported. A good network of implementation consultants can setup and customize for specific needs.

Atlassian's strategy is to grow from the bottom by delighting developers. It is expecting Agile methodologies (XP, Scrum and Kanban) to continue to proliferate with little accommodation of waterfall practices. The company further expects rapid product prototyping to become a mandatory feature in many development processes. Atlassian has assumed a key role in the Mercurial project, expecting distributed version control systems to become significant alternatives to file-based source control. Finally, Atlassian expects development in the cloud to become commonplace. By pursuing these expectations, the company hopes to be able to have a first-mover advantage over the current practices and drive significant growth.

Atlassian should continue to enjoy good success with developers that can choose their own ALM solutions, independent teams and independent software development organizations. There will be sufficient growth within the communities it's targeted to allow Atlassian to thrive through the midterm. On the other hand, organizations with high needs for traceability, formal processes or sophisticated release handling should look elsewhere. Similarly, organizations seeking a common store for tool metadata and common reporting will find the Atlassian model outside of their target space.

Rating: Positive

CollabNet

TeamForge is CollabNet's principal ALM offering. TeamForge is a collaboration-oriented ALM platform that makes use of an extensible change-tracking facility. The system can be used to define workflows and required items for state change. CollabNet's architecture integrates collaborative facilities (including document sharing, wikis, customizable project portals, discussion management, file releases and more) with facilities to associate any object with any other, and gain visibility and traceability between them. The product's integration architecture utilizes a Web service framework that can support a federated repository scheme. Like IBM's Open Services for Life cycle Collaboration (OSLC), this permits TeamForge to fit into organizations where other management tools are already in place.

This tool integration mechanism should be evaluated carefully for its fit to the toolsets in the organization. Users often cite the TeamForge workflow and approval system as critical factors that enable extensibility and the desired process control. TeamForge has rich client applications that allow users to stay in their tool of choice – e.g., Eclipse, Visual Studio or Microsoft Windows – in order to collaborate across functional teams and life cycle stages. Reporting facilities are fairly standard, and the product has been shown to scale well to large, distributed teams – a property inherited from its initial use as a repository for open-source projects. CollabNet TeamForge is the basis of Forge.mil, a hosting solution aimed at rapidly provisioning development stacks in the U.S. Department of Defense. The product is available as SaaS and as a traditional local installation.

CollabNet has grown its offerings both through development and through acquisition. This provides a set of options for users based on needs. A recent addition is CollabNet ScrumWorks Pro – an agile program management tool focused on teams that have outgrown the whiteboard and Excel, but that are not quite ready for a full-scale ALM product. ScrumWorks Pro supports sprint, iteration

and release planning, as well as basic collaboration and reporting. ScrumWorks Pro may be integrated with CollabNet TeamForge to integrate the underlying ALM software functionality. The company remains a principal supporter of Subversion, the most popular open-source version and configuration management platform. CollabNet recently launched Subversion Edge, a free open-source product that offers simplified installation, administration, security and governance of Subversion. CollabNet also recently acquired Codesion, one of the largest Subversion hosting providers, allowing teams to select and provision Subversion, other open-source tools and all of CollabNet's products online in minutes.

CollabNet has developed an open community for product integrations called collabXchange. This site carries integrations created by CollabNet, partners and users. All of these connectors are available for free from this site.

The tool is very project-oriented and has limited support for aggregation across projects. Project definitions can be used to ease the tracking of product requirements across projects. There is a centralized keyword search capability that returns matching artifacts (and other assets, such as documents or forum posts) in search results that span across projects. It is also possible to define and track a number of real-world projects under a single, logical CollabNet "project" to increase the level of aggregation beyond the broad search capabilities.

The product has integrated reporting tools and a configurable workflow. Those looking for a clean textbook implementation of Scrum with Scrum-tailored reports (like a project board, for example) will need to include the ScrumWorks tool in their assessment. CollabNet is in use in many agile projects, but has the flexibility to support other methods. Project process, structure and workflow can be templated and reused by other teams.

Beyond the core ability for workflow and collaboration, the toolset also allows for individual task creation. The tools can manage the documents and their state, as well as facilitate collaboration around these documents, but they don't capture user stories directly other than text description fields in tracking artifacts. Without a focus that goes beyond the idea of everything being an asset, there is a lack of automation across the life cycle that other tools are beginning to demonstrate (for example, use cases automatically creating test cases). Changes are tracked and managed with a clear view of dependencies based on associations across assets. Impact analysis is manual. The simplicity of the system is both its strength and its weakness.

A partnership agreement with HP complements the CollabNet solutions and greatly broadens the reach of the product. It also helps HP fill a gap to connect with developers and others outside HP's core testing audience.

CollabNet's service organization gets good marks. It will provide commercial support for Subversion, in addition to servicing the rest of the line.

CollabNet's association with Subversion has helped it win a place in many selections. The ScrumWorks product helps provide entry-level agile functionality. TeamForge offers an economical approach to ALM for iterative or waterfall shops, and is increasingly capable for agile projects. TeamForge also supports larger organizations and

projects, both directly and through the use of Codesion. Codesion is a cloud service that allows users to select, provision and purchase CollabNet's software development tools in minutes. CollabNet continues to close the functional gaps with other products.

Rating: Positive

Digite

Digite Enterprise is a process-focused, Web-based, collaborative product suite available as either a SaaS or on-premises deliverable. It is composed of more than 20 modules, spanning three broad categories – process governance, PPM and AD. Facilities include tools for requirements, test, and change management. There are integrations into software version and configuration management tools, IDEs and other development tools.

Templates are provided for waterfall, iterative and agile methods. Recent releases have extended agile methods and added better integration with collaboration and requirements tools to respond to shifts in client interests.

Digite supports three different approaches to integration: Web services, an integration framework and ad hoc. It provides an array of Web services, including generic Web services that can add, update, delete and check-status of all business entities. It also provides an integration framework enabling "hub and spoke"-style interconnections. Finally, Digite Enterprise has been natively integrated with a number of ALM tools using tool-specific techniques. For example, Mylyn is used to integrate the Eclipse IDE.

Digite's PPM functionality has led to it competing directly with CA Technologies and HP. The company typically has done extensive customization to tailor the solution to its larger customers. Digite has been particularly popular with clients seeking to support geographically separated teams, including a number of global system integration providers. Support for CMMI and ITIL will please clients pursuing those frameworks.

Clients undertaking geographically distributed development or looking for close PPM/ALM integration should particularly consider Digite. Clients seeking to support a variety of methods across teams will also find the feature set appealing.

Rating: Promising

HP

The evolution of the ALM approach at HP is accelerating. HP partners with Blueprint and CollabNet to extend its own project, requirements and quality management facilities. The solutions that are emerging are likely to be most interesting at first to the HP Software quality tools installed base. This group is typically involved with geographically separated teams or complex processes, and has a high need for configuration management and quality.

HP's greatest assets are its existing installed base for PPM and quality, its sales force, and its consulting group. We think these will help establish HP as a major provider of ALM functionality. A key factor will be HP's ability to manage partnerships to complete the solutions for clients with higher needs for agile or complex product development.

Rating: Positive

IBM

IBM is one of the few vendors with credible offerings in almost all the subcategories of ALM – requirements, software change and configuration, quality, build and distribution domains – while also offering a wealth of methodology content and workflow support through Method Composer. The centerpiece of IBM's current ALM offering is Rational Team Concert (RTC), providing workflow, integration and a common store for both older products from IBM, Telelogic and others, and for newer IBM offerings build on the Jazz platform. IBM positions RTC both as the solution for small and midsize teams just starting with the Rational tools, and as the central element of the solution for teams deploying agile methods. The original Rational ALM solution, built around ClearCase and ClearQuest, remains the lead offering for larger organizations using traditional methods, but will be eventually replaced by newer products, creating an upgrade path for the installed base. Jazz-platform-based offerings are available for requirements definition/management, SCCM, project planning, test management and asset management. Over time, additional Rational products that evolve into native Jazz-based implementations will further broaden and deepen collaborative ALM capabilities.

IBM is managing a complex product transition. Gartner clients that are users of both the original Rational Suite and the Telelogic tools had been telling us that they were looking at open source and other commercial alternatives in search of ease of use, lower administrative overhead, lower cost of ownership and different mixes of functionality. The Jazz initiative was intended to update the architecture, deliver substantial new functionality and to lower overhead. At this stage, our discussions with clients indicate that Jazz has slowed the defection of the IBM installed base. Gartner doesn't expect it to become clear whether Jazz will regain or extend the market share enjoyed by the previous generation of products until more of the initiative is completed.

The published Jazz platform road map states that many Rational products can gain the benefits of the Jazz platform through product integrations that enable rich participation in Jazz-managed processes, and that interoperability with IBM and third-party products is designed to make the transition to the Jazz platform a productive and positive experience. This vision is only partially realized. There are a lot of adapters to integrate existing IBM products. There are few IBM-supported integrations, with the most common third-party products being HP Quality Center, for example. Small third-party vendors do supply integrations to both HP Quality Center and to Microsoft Visual Studio.

To enable standards-based integration between both IBM and third-party tools, IBM is supporting OSLC (an open XML- and REST-based tool integration format) as a standard way to connect tools across the life cycle without the need for point-to-point integrations. Uptake among other major ALM players is limited currently. IBM is making significant use of OSLC internally, which boosts the likelihood that smaller vendors will exploit OSLC to gain access to the IBM installed base.

Gartner believes that a full range of products on the Jazz platform are probably still two to three years away. Even then, we expect existing customers of Rational to face some difficult decisions. The big installed base may create challenges for IBM in the sense that it will be difficult to migrate existing customers to the new solutions and, at the same time, keep up with innovations from smaller competitors.

Scalability and performance of the Jazz-based products continue to improve. IBM is supporting a broad number of internal users and is refining network use and caching for better scaling. IBM still has to remove differences among the various Jazz platform offerings to resolve the installation and use difficulties reported by many of our clients.

We rate IBM as a Strong Positive because of its installed base and breadth of portfolio. The breadth of the offering enables IBM to address a large variety of users. In the midterm, gaps in the relatively new PPM offerings may handicap some broader integrations. The community development model of Jazz, coupled with IBM's aggressive acquisition pace and rework of the Rational offerings, sets a strong pace. Client desires for lower-cost solutions and interest in specialized, narrowly focused Agile and/or cloud-based ALM solutions will be threats to the current IBM offerings.

Rating: Strong Positive

Kovair

Kovair's ALM Studio offering is a Web-based, process-oriented implementation. Its single repository, process and policy engines are available on-premises installed or as a SaaS offering. The process and workflow engine is particularly strong, but functionality covers most of the development life cycle, including the management of requests, requirements, projects, tests, work items and vendors. There is also an IT service management offering built on the same technology. Although Kovair provides a lot of functionality, its Omnibus Integration Middleware technology also integrates to the most common test and development products, thus fitting in both where other tools are already in place or as a greenfield installation. This fits in for organizations that need to create common workflows to offer "factory"-style work streams, but, at the same time, need to plug into whatever other tools they need to support.

This very configurable tool enables users to create their own ALM applications within the same framework using its drag-and-drop administrative interface.

The process engine is full-featured and supports parallel tasks. It also has templates for Scrum and waterfall. Scrum support does not adhere as strictly to the textbook as some of the other tools, but all the key processes, reports and backlog/sprint elements are captured. A key element of the workflow process is the degree of automation in the system, which includes items such as automatically generating requirements from user requests, automating the requirements review process, and connecting requirements and test cases for impact analysis. The policy engine helps by enforcing policies along the life cycle, reducing rework and driving a quality assurance mentality. Kovair's integration and process technologies work together to process-enable those external tools that don't have any built-in process capabilities of their own.

Growth has been relatively slow, but steady. Kovair has been selected by some very large, distributed organizations. Pricing is attractive for both SaaS and on-premises offerings. The SaaS offering provides a vehicle for easy trial access and market seeding, such as that enjoyed by Rally and others.

Kovair needs to establish differentiation from larger, stronger competitors. The key will be to build broader recognition among potential customers. Kovair must combine this with a concerted partnering effort and the development of a stronger community where users can share process templates and integrations.

We expect organizations that need to create common workflows, and those looking for good processes and integrations, or to support geographically separated teams, will be most likely to select Kovair.

Rating: Promising

Micro Focus

Micro Focus participates in the ALM marketplace through the tools acquired from Borland and Compuware. The core pieces of functionality: Caliber (for requirements definition and management), Silk (for automated software quality) and StarTeam (for SCCM) are all receiving investment again, which they haven't seen in the past few years. Each of these products has solid integrations with other Micro Focus tools, as well as to third parties, but they don't have a specific ALM hub.

Current offerings tend to be interesting to clients that are emphasizing requirements and quality in their ALM selection process. Micro Focus has the special opportunity of being able to directly approach its legacy renovation and quality customers with ALM solutions.

Rating: Promising

Microsoft

Visual Studio 2010 gives Microsoft's ALM offering a new, more-cohesive look, and addresses pricing and administration obstacles that have limited the use and adoption of the ALM offering. Microsoft's strategy is to build from the significant base in the construction IDE core (Visual Studio); from the broad enterprise use of Office and SharePoint for requirements, tasks and workflow; and with its aggressive pricing model. It continues to enhance workflow and metadata handling, as well as expand the tools from which you can use the ALM features.

With Visual Studio 2010, Microsoft reduced the prices of both the VS client and the Team Foundation Server (TFS) component. Microsoft also incorporated interfaces to leverage its project and PPM offerings, as well as its agile methodology positions, to build awareness and commitments in larger clients. Although gaps remain in some management and execution tool areas, the technical approach is well-suited to support multiple instances of tools from multiple vendors. Because Visual Studio has such broad industry support, many of the gaps are "filled," and clients have the ability to exploit existing investments in products like HP Quality Center. Microsoft's recent contributions to filling in the gaps include testing, lab management and modeling in the Visual Studio 2010 release.

Visual Studio Team System (VSTS) and TFS had demonstrated scalability, but install setup was complicated and there had been administrative challenges for organizations with large numbers of projects. Substantial improvements to administrative facilities have been delivered in Visual Studio 2010. Another area of improvement is the ability to customize workflows, adding flexibility in supporting

both agile and more-formal development processes, as well as enabling support from third parties. Additionally, there are more reporting and analytic capabilities. Microsoft's offering is well-architected for provisioning as a service, and for support of agile and other emerging styles of application delivery. Microsoft's commitment to the development tools market, and its depth of resources, should result in continued broadening of the solution.

Microsoft improved support for Eclipse and for other non-Microsoft environments with Visual Studio Team Explorer Everywhere 2010. This permits users to store artifacts in TFS. Cross-platform support in other parts of the solution are limited, so a separate Java tool stack is likely needed.

Another plus for Microsoft is the strength of its Microsoft Developer Network (MSDN) franchise. Relatively low cost and ease of acquisition make MSDN a realistic channel to sell ALM into many accounts.

Microsoft has a strong reach in the market, and moderate pricing for a large, stable provider. It has a proven, scalable architecture. A large community of supporting vendors helps fill gaps in the tool portfolio.

Rating: Positive

MKS

MKS builds from a strong heritage in SCCM and developer tools, particularly in large enterprises. It has had particular success with teams with significant needs for auditable processes, and with companies developing complex products, complex processes, or supporting lots of variants (for example, lots of different mobile devices, browsers or multiple delivery vehicles). MKS has also been successful supporting geographically distributed development projects. Clients have increased interest in MKS's agile support, particularly in organizations that have to support a mix of agile, traditional and hybrid teams.

The company has created an ALM platform based around a framework with unified support for requirements, test management, development workflow, reporting and metrics, with configuration and change management integral for all artifacts. This framework supplies a consistent data structure that permits the creation of relationships that, in turn, allow the traceability, metrics and suspect flagging that is essential to collaboration. It further allows the construction of composite items (that is, documents) from the underlying artifacts. The architecture employs Java Web servers to allow platform-neutral, multitier enterprise implementations. The product has strong tools for customizing workflows and reports, and is capable of supporting highly regulated processes. Industry and domain solution templates accelerate implementation, although significant customizing and tailoring of processes generally require consulting assistance from MKS.

In addition to its strong hub and built-in functionality, MKS has strong integrations to major products like BMC Remedy, Perforce and IBM ClearCase, HP Quality Center or CA Endeavor. Integrations are through APIs and require good programming skills or services from MKS.

MKS has enjoyed success with extensions for requirements management and test management. This, combined with support for parallel development, has given MKS a good presence in the technical and embedded systems spaces. Although the product is extensible

and MKS has a fair number of “partners,” the focus on the merits of its complete integrated system has necessitated fewer out-of-the-box integrations to other systems (that is, integration of data from other tools, and the synchronization of this information). Clients use MKS for a variety of development methodologies, including agile, but usually including traditional and hybrid techniques. The solution is often selected when a strong focus on regulatory compliance is needed.

The pricing structure will appeal to certain clients. Rather than separate prices for each of the pieces, there is a single price per user for the entire platform.

We rate MKS Positive based on its relatively complete offering, multiplatform support and success in enterprise-level selling. MKS will be attractive to clients seeking strong process, change and configuration support for parallel or distributed product development, or those who find MKS’s approach to requirements compelling.

Rating: Positive

Parasoft

Parasoft has joined other test tool providers in embracing ALM as an extension of service to its existing client base. Parasoft not only delivers a suite of integrated testing capabilities within the ALM solution, but it also leverages these automated testing capabilities to deliver objective, timely feedback on the flow of development activities, with the objective of enhancing productivity while delivering more-consistent releases.

There are a number of distinctions to the company’s approach. Parasoft delivers work items into the top IDEs (Eclipse, Visual Studio, JDeveloper, IntelliJ, etc.), and delivers management control via a policy and a process engine for the consolidation of work items on the desktop. Parasoft uses the term “policy-driven development” to focus on process improvement, rather than solely task management. Policy allows management to set expectations around what and how actions should be taken. Expectations act as process control points, with the objective of achieving greater process control.

Parasoft works from the same value statements as most other ALM tools, but describes its delivery in more quality-centric terms: integrating policy-driven project management with defect prevention and end-to-end quality assurance testing. Parasoft has leveraged BPEL for process implementation, and includes business process management (BPM)-like process authoring in addition to preconfigured process flows. The products are delivered in virtual machine images, enabling both on-premises and hosted models. Parasoft prefers a subscription model, aiming for per-seat costs that are a fraction of most on-premises solutions.

The Parasoft toolset integrates with most of the major incumbent project, test, version and configuration tools; Parasoft also provides virtual appliance preconfigured systems with major open-source solutions (e.g., Subversion, Maven and Bugzilla). This offering is particularly suited to clients seeking to implement complex processes and products with challenging quality goals, or clients who must demonstrate compliance to industry or regulatory guidelines. We expect that organizations seeking to drive high-productivity quality processes and policies across a number of teams will find the Parasoft approach particularly appealing.

Rating: Promising

Polarion Software

Polarion’s Web-based ALM product implements collaboration, workflow and traceability on a central repository. This design is utilized to good effect, with the product delivering strong change management, change propagation and traceability. The product offers support for a broad set of functionality, including the management of requirements, test cases, change, tasks and builds, as well as wiki-based collaboration.

Workflows can be defined globally for an enterprise, and customized for individual projects. Projects can be organized into different levels and viewed at different levels of aggregation.

The product runs on an open-source stack of Subversion and Apache Tomcat. All data is represented in XML and versioned. The data is, thus, available, consistent and easily audited. The product can be broadly customized through a table-driven administrative interface.

Polarion has preconfigured for Agile (XP, SCRUM), iterative, formal (CMMI) and a number of other method variations. A community site provides sharing of integrations and other artifacts. Integrations are available to Eclipse and Visual Studio, as well as to a substantial number of common development tools. Polarion offers commercial support for both Apache Tomcat and Subversion, the open-source portions of its stack.

Polarion ALM is a wiki-centric product. People can collaborate by sharing content, discussing single work items and creating work items by using the embedded wiki technology. The wiki is also the key reporting technology. Users can use macros in the wiki to extract reports and export to many different formats. Beside this, rich dashboarding and Microsoft Word and Excel report generation is provided.

Polarion offers several entry points to its product line with an ability to seamlessly move up, as the organization is ready for additional levels of process management. This includes a basic defect tracker and wiki collaboration portal that are integrated with Subversion.

Polarion has demonstrated good scalability among a reasonable number of companies. Reports on stability and quality of service are good. The company still needs to grow its sales and marketing execution, including community and partner ecosystems, while continuing to provide good support.

Polarion would be a good selection for companies seeking to manage complex processes or a variety of processes. Clients with high needs for traceability and auditability will also find this a good fit to their needs.

Rating: Promising

Rally Software

Rally focuses on organizations adopting and scaling agile methods. It supports this not only with the tools, but with training and a support community. In addition to strong support of Scrum, Rally supports other Agile methods, including XP, Agile UP and Dynamic Systems Development Method (DSDM) and emerging methods like Kanban. It promotes the use of “lean” principles across the ALM life cycle, and offers a strong, independent toolset that integrates

with many products through a solid architecture. The product supports activities throughout the application development life cycle including idea generation, requirements, test case, defect, program, project and product management functions. Rally has interesting integrations to both the Eclipse and Visual Studio IDEs. Rally supports IBM's OSLC. It integrates with Microsoft TFS, as well as with Visual Studio for the viewing and updating of tasks. The product also has good ability to show consolidated views across multiple projects.

The management team has a strong track record that shows through to how the application is architected. It recognizes the need for more than project management, and that more roles are involved than developers or project managers. The offering is flexible and well supported by Rally's training and consulting offerings, including an online community and the Agile University.

Because of the Web focus of the tool, Rally also provides unique Ruby integration facilities and an AD toolkit. That allows wikis, Web pages and reports to use Rally, or community scripts and themes embedded without the Rally tool. It also offers a platform-as-a-service offering to support community exchanges, applications and popular cloud toolkits. The company provides over 40 prebuilt apps in its app catalog to extend and customize the platform.

Rally is offered primarily as SaaS. This provides cost flexibility and instant-on setup, and simplifies the use of remote resources. The product can be run on-site, but this is a bit restricted in that a complete virtual machine configuration must be run. This limitation on internal configuration and online format provides benefits to those who select the product, but limits its acceptance in organizations that have tight security rules or require access to specific components in the image.

SaaS delivery provides ease of administration, removes upgrade challenges and reduces the cost of ownership. Organizations that are using salesforce.com for customer service, and those that are also focused on agile Web application projects, are a good fit for adoption of Rally. Rally offers a free community edition, which supports up to 10 users. Rally has continued to extend its functionality both internally and through the development of a partner network. One focus is to improve the breadth of project types that are supported; another is to continue to build out functionality to support agile. Partners like StreamStep, AccuRev and Tasktop extend the solution, while service partners allow Rally to service a larger and more-diverse client base.

Rally had shown continued success, building substantial brand awareness. This product fits best in organizations with teams that are distributed (including in the use of external contracted development work), and where organizations are comfortable with an agile approach and don't have significant investments in a high-end SCCM system.

Rally primarily offers a hosted format. It has strong overall support for agile. The company's architecture and integrations are sound and reasonably complete. The hosted offering is easy to adopt and inexpensive to propagate throughout the organization.

Rating: Positive

Seapine Software

Seapine targets midsize companies in quality-critical industry such as financial services, life sciences, embedded systems and defense. It has grown its base of lower-cost requirements, test and SCCM tools by gradually adding functionality. Seapine offers both named and floating licenses for its four offerings: TestTrack Pro, TestTrack TCM, TestTrack RM and Surround SCM. The automated testing tool QA Wizard Pro is available as a dedicated, per-machine license and floating license per subnet. Seapine also licenses the ALM suite, allowing customers to purchase licensing models that fit their installation sites based on type of users per product. There are no additional fees for servers. Virtualization is provided by integration with VMware and VMware vCenter Lab Manager.

Although method-neutral, Seapine has added specific features and some services to accommodate agile development. Cost of ownership is reported lower than similar hybrid products that attempt to cover both agile and standard processes. There are good integrations with both Visual Studio and Eclipse, and with Microsoft's SharePoint and Project, as well as with major version and configuration tools. Implementation is fast, and administration overhead is small. Client satisfaction is high.

Small and midsize organizations will find the combination of broad method support at low cost of ownership an attractive alternative to the larger vendors. Companies seeking a single-vendor solution will also like Seapine. Lack of broad name recognition will continue to limit growth.

Rating: Promising

Serena Software

Serena has built its Orchestrated ALM offering around the Dimensions CM capabilities, adding sold requirements and project management features to the deep configuration and release capabilities. Dimensions serves as the principle repository and base for integration and reporting. The solution is completed by the workflow product Serena Business Manager (SBM). The SBM facility can be a locally delivered or a SaaS-delivered toolkit for building a variety of facilities, including reporting, asset management and auditing.

Serena's solutions suit organizations that have a mixture of mainframe and distributed platforms that desire a unified set of tools for change and reporting. The product is particularly strong where complex release planning is needed. A partnership with Nolio promises further capabilities in that area. Improved capabilities for geographically distributed development and for complex variants are relatively new, but should allow additional sales in those segments.

A new management team has been in place for less than two years. They have improved focus, strategy and execution particularly in the last year. Serena needs to re-establish customer confidence in its story. Reconnect with existing customers of ChangeMan and PVCS could provide significant growth opportunity.

We rate Serena Positive because of its technical depth, broad customer base and direct sales force. It offers a solid solution for companies that have a mix of pieces already in place and want something to pull them together, rather than replace them. A high level of auditability, traceability and transparency makes Serena suitable for complex processes (highly regulated environments). Geographically separated teams and complex variant teams will also find Serena appealing.

Rating: Positive

SmartBear Software

Formerly branded Software Planner, SmartBear has rebranded and repackaged, and will be marketing: ALMComplete (all features), DevComplete (requirements, defect tracking and project management) and QAComplete (requirements, test case management and defect tracking). Its free products include DevPlanner (project management only) and QAPlaner (test case management). The free tools, DevPlanner and QAPlaner, are available as SaaS offerings. ALMComplete, QAComplete (and TestComplete integration for automated testing) and DevComplete are offered on-premises or as SaaS, but the intention is to focus on a lower-cost, cloud-based alternative to the likes of HP and IBM.

SmartBear's vision is to tailor and deliver in the manner most helpful to the development and testing team. Its strategies of focusing on technical teams, lowering pricing and growth through smart acquisitions are all positives, as is its ability to go with hosted solutions. Formed as a merger of the original SmartBear Software, Pragmatic Software and AutomatedQA, the new entity (SmartBear Software) seems to have good potential to exploit fast-growing parts of the market.

Cost-sensitive small and midsize businesses, software vendors and departmental teams of larger enterprises are most likely to like SmartBear. Completing its repackaging and rebranding is a priority for the company in the short term.

Rating: Promising

TechExcel

TechExcel provides a single, integrated set of tools that supports strongly governed practices, as well as review and change management. The system has good facilities for workflow management, and can support formal and informal reviews by individuals or groups. The ability to conduct and track attendees and outcomes of group reviews is unique to this product. The company is also one of the few with explicit links to ITSM tools, and TechExcel provides CRM tools to connect to customer support activities.

The workflow for TechExcel's products is flexible and supports both agile and more-structured methods. The system is also scalable in its support for subprojects, and each of these can have an individual workflow. The closely tied workflows among requirements, development and test processes have been a primary differentiator.

The solution is available as a hosted or traditional installation. In addition to the core products, TechExcel offers a set of prebuilt outlines for handling specific areas of the application life cycle, as well as industry-specific solutions. The product is integrated to a

number of version control systems, including Perforce, Microsoft TFS, Subversion and AccuRev. There is no general integration hub, but Web services are supported for synchronization. Traceability is handled across all the life cycles that TechExcel supports.

TechExcel has an established customer base and attractive pricing. The tools are flexible and well-integrated. The products will suit to all four of the principal ALM scenarios – agile, geographically distributed, complex process and complex product.

Rating: Promising

ThoughtWorks

ThoughtWorks Studios is the products division of ThoughtWorks. For more than 17 years, ThoughtWorks has been delivering large-scale enterprise applications using agile methods to large- and very-large-enterprise clients. ThoughtWorks Studios products seek to embody the collective real-world experience and best practices of their parent company, ThoughtWorks. The company's solutions are relatively new to the tools space. Its Adaptive ALM solution is an integrated offering composed of three products targeting agile practices, named Mingle, Go and Twist:

- Mingle is the agile project management and collaboration component of Adaptive ALM. It supports team collaboration, release planning, metrics tracking and reporting, team and issue tracking, and PPM.
- Go, focused on agile release management and continuous integration, provides real-time visibility and control of the build, deploy, test and release process for operations teams, testers, developers and management.
- Twist is the agile collaborative testing component. It is a centralized testing platform to create, execute and maintain all manual and automated test scenarios in one space.

The Adaptive ALM suite also includes a service offering called Agile Workshops. Agile Workshops provides training and education across a broad curriculum of agile techniques (e.g., from fundamentals to advanced courses, as well as customized courses). It introduces customers to methods pioneered by ThoughtWorks (e.g., new ways of applying release management and automated testing).

ThoughtWorks' strength in consulting and delivering software to enterprise customers is a significant advantage, helping the company identify prospects and quickly show value from its products. The product's REST-based integration points should allow broad coexistence with other products, but out-of-the-box integrations are currently limited. The strong focus on agile project and technical practices will suit agile teams, both local and distributed. There is limited support for more-traditional project, demand and requirement management. We expect this offering to become more attractive as ThoughtWorks Studios expands awareness of its product set and as support for the most common incumbents, like HP Quality Center, is delivered.

Rating: Promising

VersionOne

VersionOne's focus continues to be on managing agile development processes and projects, across the spectrum of agile methodologies. In recent releases, VersionOne has extended its capabilities in each stage of the life cycle. It has added idea management facilities to structure and manage user idea submission and prioritization. A product road map application was integrated for delivery planning. Test case planning, tracking and reporting were expanded for test and assurance teams. Custom report authoring, analytics and a local data mart have expanded reporting. These additions fill out the offering to provide project-, product- and program-level planning and reporting throughout the cycles of iterations.

Although it's available as a SaaS offering, VersionOne can also easily be installed on-site, and accessed from browsers, which is one of the reasons customers choose it. VersionOne supplies for templates Scrum, DSDM, XP and Agile UP. The product is less well-suited for companies using traditional waterfall. Templates are highly customizable for terminology and fields around a general, iterative process model. An advantage with VersionOne is its pricing and licensing model. This is often a subscription model, and VersionOne offers both a free and a very-low-priced entry edition that enables a large base of supporters to promote the product.

VersionOne provides an open integration platform, as well as an open Web service API. Development toolkits are provided for both .NET and Java. Prewritten integrations are provided for many common development tools, such as Visual Studio, HP Quality Center or Perforce. The current set of integrations is documented on the company's website.

Administration facilities are improving. Teams can now define and control their own specific workflows and field-level customization at the project or team level, and still roll up and report at an organizational level.

Rapid adoption rates have been achieved. Early adopters reported some tuning difficulties, but extensive investments in the past year or so in performance improvements seem to have resolved those challenges.

VersionOne appeals to buyers concerned with specific problem gaps or process changes, because the company focuses on delivering a feature-rich agile implementation.

VersionOne's Positive rating is based on the company's focus on Scrum and other agile methods, its attractive price and its ability to achieve viral adoption.

Rating: Positive

Vendors Added or Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

Gartner MarketScope Defined

Gartner's MarketScope provides specific guidance for users who are deploying, or have deployed, products or services. A Gartner MarketScope rating does not imply that the vendor meets all, few or none of the evaluation criteria. The Gartner MarketScope evaluation is based on a weighted evaluation of a vendor's products in comparison with the evaluation criteria. Consider Gartner's criteria as they apply to your specific requirements. Contact Gartner to discuss how this evaluation may affect your specific needs.

Note 1. Example Workflow, Quality, PPM and SCCM Vendors With Some ALM Characteristics

- Axosoft
- CA Technologies
- Compuware
- Fujitsu
- Oracle
- SAP
- SemanticSpace Technologies
- Workspace.com

Note: This is not an exhaustive list.

In the below table, the various ratings are defined:

MarketScope Rating Framework

Strong Positive

Is viewed as a provider of strategic products, services or solutions:

- Customers: Continue with planned investments.
- Potential customers: Consider this vendor a strong choice for strategic investments.

Positive

Demonstrates strength in specific areas, but execution in one or more areas may still be developing or inconsistent with other areas of performance:

- Customers: Continue planned investments.
- Potential customers: Consider this vendor a viable choice for strategic or tactical investments, while planning for known limitations.

Promising

Shows potential in specific areas; however, execution is inconsistent:

- Customers: Consider the short- and long-term impact of possible changes in status.
- Potential customers: Plan for and be aware of issues and opportunities related to the evolution and maturity of this vendor.

Caution

Faces challenges in one or more areas:

- Customers: Understand challenges in relevant areas, and develop contingency plans based on risk tolerance and possible business impact.
- Potential customers: Account for the vendor's challenges as part of due diligence.

Strong Negative

Has difficulty responding to problems in multiple areas:

- Customers: Execute risk mitigation plans and contingency options.
- Potential customers: Consider this vendor only for tactical investment with short-term, rapid payback.