

IDC MarketScape

# IDC MarketScape: Worldwide Strategic Portfolio Management and IT Project and Portfolio Management 2023-2024 Vendor Assessment – Driving Adaptive Business Optimization with AI and Connected Data

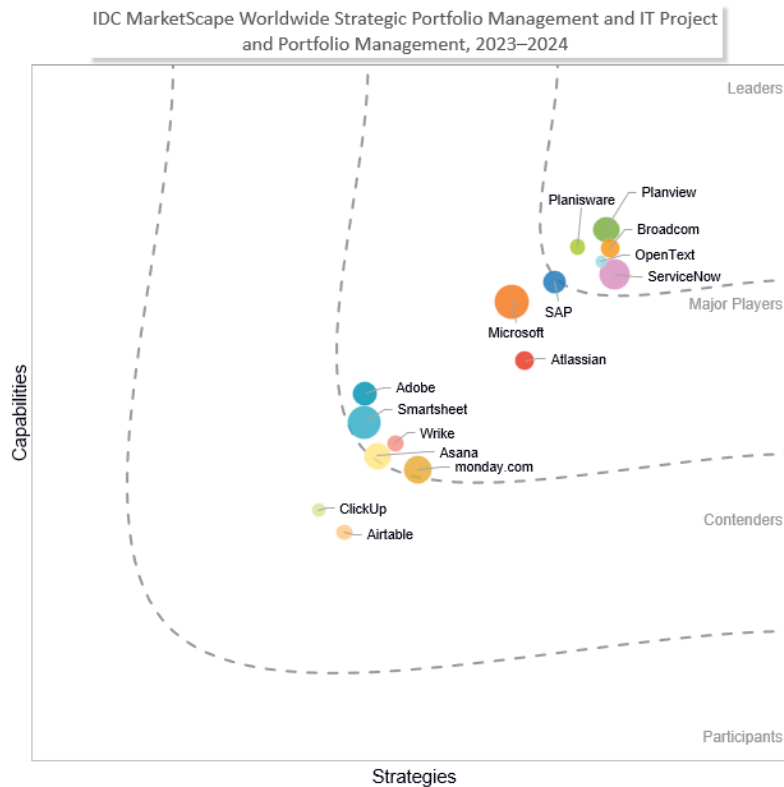
Melinda-Carol Ballou

THIS IDC MARKETSCOPE EXCERPT FEATURES OPEN TEXT INC.

## IDC MARKETSCOPE FIGURE

FIGURE 1

### IDC MarketScape Worldwide Strategic Portfolio Management and IT Project and Portfolio Management Vendor Assessment



Source: IDC, 2023

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 Strategic Portfolio Management and IT Project and Portfolio Management 2023-2024 Vendor Assessment – Driving Adaptive Business Optimization with AI and Connected Data (Doc# US49436523). 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

---

IDC is analyzing strategic portfolio management (SPM) for the first time with this IDC MarketScape assessment. We are doing so in the context of IT project and portfolio management (PPM), given the role that high-quality, adaptive, well-performing, and secure software and IT initiatives play in driving business and digital innovation. SPM is a dynamic framework for agile business and technology capabilities management, with a holistic view of the enterprise and its ecosystems, enabling business adaptation, resilience, innovation, and acceleration in a fast-changing context. SPM must be continuous, collaborative, and contextual to optimize strategic business alignment and execution, encompassing areas such as adaptive planning (including value stream management (VSM) – a core focus for a related IDC MarketScape in this series – and other capabilities). Businesses must invest in process and organizational change for systemic adoption across roles. We see artificial intelligence (AI), machine learning (ML), and generative AI (GenAI) enabling efficiencies and execution for SPM and IT PPM.

IT PPM tools facilitate joint business/IT planning. High-end IT PPM products provide portfolio visibility into IT projects, programs, and resource allocations and costs in conjunction with expected business value to enable effective prioritization. Prioritizing projects and programs to deploy applications across mixed, multimodal environments demands a variegated approach to IT project, program, and portfolio management. For this reason, IDC's evaluation criteria for IT PPM incorporate breadth and depth across areas for combined IT PPM capabilities as a foundation and existing and emerging support for an "end to end" DevOps – from project initiation through to deployment handoff.

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 assessments completed in coordination with one another – examines contextualized PPM and connected work adoption patterns and trends and how they are impacting business success and solution availability from leading high-end providers and from smaller, innovative PPM and collaborative work management (CWM)-focused vendors. Specifically, key strategy measures for SPM and IT PPM success include:

- For SPM, a key point is the inclusion of "ecosystem" – some SPM definitions don't (but should) include ecosystem, which is necessary for portfolio management to be strategic.
- Adaptation, resilience, innovation, and acceleration drive optimized business outcomes (all four have been key as we evolve for digital innovation and increasingly leverage AI, ML, and GenAI to do so), along with the ability of SPM systems to be continuous, collaborative, and contextual.
- Process and organizational change enable adoption and must be part of this SPM strategy.

- 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 deep analytics with intuitive dashboards with AI and GenAI (with governance and guardrails), scalable architecture, quality, and release management with DevOps coordination. We see evolving coordination with IT portfolio prioritization for software creation as part of "smarter products" impacting embedded systems and the IoT market. (New product development has a role here.)
- 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, user stories, OKRs, 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.
- IT PPM demands effective process frameworks (including agile), organizational strategy, and 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.
- We are also adding more vendors with intuitive, collaborative work management capabilities to our SPM assessment 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 IT PPM execution.

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

---

IDC evaluated 15 vendors for inclusion in this 2023-2024 worldwide IDC MarketScape for SPM and IT PPM. Vendors needed to have sufficient SPM, project, program, and/or portfolio capabilities available. We also included vendors with adaptive, intuitive collaborative work management functionality and ease of on-ramp for adoption with some SPM and/or IT PPM capabilities. Vendors needed to appear in IDC discussions with end-user clients as part of RFP and other inquiry for enterprise SPM and IT PPM during 2023 and should have minimum overall revenue of \$10 million for CY22, with at least \$5 million of that revenue as SPM or IT PPM revenue. Vendors evaluated are Adobe (Workfront), Airtable, Asana, Atlassian, Broadcom, ClickUp, Microsoft, monday.com, OpenText, Planisware, Planview, SAP, ServiceNow, Smartsheet, and Wrike.

IDC structured its approach to inclusion for vendors in the SPM and IT PPM category based on the strength of their products' overall SPM, 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

---

SPM underlies effective business and IT execution. How do we enable intersectional coordination and collaboration across teams and enterprises, given the impact of ongoing flexible work models, where staff are dispersed locally and globally and where the data to inform decisions is dispersed across complex systems? As discussed previously, software drives business execution for digital innovation

and competitive position. The sheer velocity and complexity for software deployment have also driven software life cycle and DevOps adoption with project and program management. We increasingly see broader use of IT PPM in coordination with value-driven, adaptive, and 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 value metrics and quantitative metrics to help assess IT software project delivery and/or delays. These 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 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.

We see the dramatic emergence of AI, GenAI, and ML support by SPM and PPM automation vendors to proactively surface data to make it pragmatic and actionable – a core factor for organizations seeking to benefit from information that too frequently remains unused. Advantages include the evolving ability to leverage ML for predictive analytics and to inform improved, adaptive execution.

With the dramatic rise in AI and especially GenAI in 2023 moving into 2024 and beyond, we see significant opportunities for users evaluating and adopting SPM, IT PPM, and the other areas being assessed in this four-part IDC MarketScape series. IDC research shows top 5 investments for increasing productivity in the next 18 months, and the top area is *data analytics and project management tools*, followed by *AI assistants like OpenAI's ChatGPT, Bard, and Copilot*, followed by *collaboration tools* that support more flexible work models – like SPM and CWM. IDC research also shows the ways in which GenAI can save time, improve speed for decision making, and incorporate workflows more effectively.

That said, while benefiting from the efficiencies of GenAI, organizations should incorporate effective guardrails and governance for a technology that is wildly popular and yet still immature. In addition, over time, we expect GenAI to become so efficient that users run the risk of ceding strategic decision making to GenAI's recommendations – with costly consequences potentially to business execution and innovation. For now, however, the benefits of scale in terms of increased efficiency and leverage of information, combined with initial frameworks, let individuals and teams quickly benefit via easy connection to data and visibility into how that data can translate into actions to increase efficiency.

AI and GenAI can also help with adoption of automation by making data visible and useful, increasing "stickiness" of tools – since 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 SPM and 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 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 strategy 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 CWM providers as part of this assessment.

And we see a shift. IDC observes increasing crossover as these products evolve and scale due to the currency and mass of data available as a foundation model for LLMs and overall analysis. 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 value-centric and flexible delivery models to enable faster adoption (on-demand, hosted, and/or hybrid or multitenant cloud). The lack of resources needed 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 SPM and 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 agile, iterative, and hybrid agile processes. No SPM implementation will be useful and successful without good processes; SPM automation must be used appropriately as part of the project, ART, 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 70 user references with whom IDC spoke for the IDC MarketScape series analysis during 2023.)

Effective SPM enables adaptive, scalable, and 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 VSM, agile, and ALM capabilities to feed project information with excellent reporting and analytics to enable metrics for executive and team responsiveness, with ever increasing AI, GenAI, and ML support. The need for visibility into and access to end-to-end data about initiative releases is also driving demand for coordination from business applications and ERP for resource management, HR, and CRM to coordinating with IT and DevOps capabilities. We will be evaluating VSM (for the first time) along with agile PPM capabilities of providers in a focused way as part of our analysis. This will include value-centric approaches with VSM, hybrid agile, and direct, scaled, systemic agile support and adoption, which play a role increasingly for business project, product, and program decision making and was also a factor for consideration in this analysis.

## VENDOR SUMMARY PROFILE

---

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.

### OpenText

OpenText is positioned in the Leaders category in the 2023-2024 IDC MarketScape for worldwide strategic portfolio management and IT PPM.

OpenText products evaluated for this IDC MarketScape vendor assessment series and research analysis initiative include OpenText PPM and OpenText ValueEdge – related products include ALM Octane, LoadRunner Family, and UFT Family quality products as well as service management as part of IT operations management (ITOM). OpenText finalized its Micro Focus acquisition 1Q23, bringing significant opportunities for strategic execution to the combined portfolio including the key areas of AI/ML and GenAI (with the company opentext.ai announcements in 4Q23, see *OpenText World 2023 Features New Efficiencies with AI-Assisted DevOps and Security*, IDC #IcUS51336023, October 2023).

Most significant is OpenText's recent GenAI OpenText Aviator announcement in 4Q23 with its poly model approach, delineated Aviator for Business and Aviator for Technology offerings, and the opportunity to pull in OpenText's product portfolio with OpenText PPM and related testing and DevOps products as part of OpenText Aviator DevOps. An OpenText challenge as a massive information company is uniting data and user access across its expansive portfolio. OpenText Aviator creates an adaptive, human-centric framework for doing so and addresses burgeoning demand for AI and GenAI.

OpenText PPM's delineators include a flexible workflow engine for process modeling and governance, hybrid resource management (for traditional and agile teams), portfolio stream planning and "what-if" analysis, and financial management (e.g., multicurrency, agile costing and integrations). OpenText's strengths are portfolio breadth with its PPM suite, flexible delivery model, increasing coordination with the company's broader platform (and integration with third parties), and investing in key SPM and PPM-related areas as it seeks to vitalize its user experience and broader platform (including quality team costs and planning, product portfolio management, VSM, agile capabilities, and DevOps). OpenText's cloud-based ValueEdge product strategy with VSM and AI capabilities is an integrating technology across its software portfolio. The company's ValueEdge product release (3Q23) targeted improving demand and resource management for better software delivery; planning and delivering waste-free value flow; and overcoming quality challenges related to performance, functional, and/or staffing issues. OpenText PPM focused on a redesign of "what-if" analysis and scenario planning, strategic themes alignment, and aggregation of KPI impact across portfolio levels and business goal hierarchies. These functional and UI improvements aid in usability and needed data access for OpenText. ValueEdge (VE) Strategy lets users map Agile entities to both Digital Value Streams (DVS) and Business Value Streams (BVS) for visibility of Value Streams across the portfolio hierarchy of the organization and for financial management of value streams. OpenText in 1H23, focused on three key areas – strategic portfolio management as part of ValueEdge, codeless testing, and smart analytics.

IDC sees retaining and leveraging of effective and visionary executive leadership with strong follow-through as OpenText evolves what it has described as a strategic combination of personnel and assets. At OpenText World 2023, CEO Mark Barrenechea said that the acquisition of Micro Focus (closed CY 1Q23) expanded OpenText's information management and committed to integrating automation capabilities to offer an information management cloud. Another announcement brings partners together with OpenText Partner network for OpenText and Micro Focus partner ecosystems to support 30,000 global partners. And under the combined company, ValueEdge's agile and value stream-oriented capabilities are interweaving the DevOps platform and PPM under the same ADM product group as DevOps quality and other products (e.g., ALM Octane, LoadRunner). This makes sense since the agile capabilities for PPM reside in ValueEdge (as well as ALM Octane), and there are synergies for the customer base with OpenText as DevOps and software initiatives drive digital and business execution. (This is an area on which OpenText has not focused previously, so a key opportunity.)

User references have found OpenText PPM to be beneficial for business optimization, cutting costs, and enabling efficiency, including transitions to agile and DevOps, IT business management metrics, visibility, and controls. Cited as strengths for OpenText are the product's financial management capabilities and integration and workflow support. Several were engaged by the ValueEdge strategy and beginning to adopt capabilities as part of an agile and VSM approach. Challenges include user interface and accessibility, which references said have been improving (but still an issue, especially for time tracking). Overall, OpenText has been competitive in the PPM market, and we expect it to evolve well into 2024, with ongoing customer outreach and engagement, cross-platform coordination, and dynamic execution. The incorporation of AI/ML and GenAI are key opportunities – combining OpenText Content Aviator that enables intelligent assistance via chat-based, conversational search, and OpenText DevOps Aviator can provide insights in both DevOps and broader business initiatives, potentially, along with OpenText Cybersecurity Aviator with prioritization for value and risk.

## Strengths

OpenText's strengths are in the depth of functionality of SPM, PPM with existing high-end deployments, emerging and improving agile and VSM support, and its position as part of the broader OpenText product line. The breadth of the company's portfolio including PPM and ValueEdge with automated software quality, requirements, ALM, DevOps, agile (incorporated into ALM Octane for granular support and for PPM higher-level portfolio views), services, network virtualization, and security provides opportunities for coordinated execution across the product portfolio. (For context about OpenText's and ValueEdge testing capabilities, see *IDC MarketScape: Worldwide Enterprise Automated Software Quality and Continuous Testing for Digital Execution 2022 Vendor Assessment*, IDC #US47097621, March 2022.) OpenText seeks to take advantage of synergies across these product sets leveraging PPM, which are key opportunities for the organization. On the PPM cloud execution side, adoption has been growing for PPM subscription models (single tenant, hosted for now). Overall, OpenText has a solid, enterprise PPM offering that has the opportunity for increased adoption moving into 2024. AI (including generative AI) and ML merging data analytics support across the combined portfolio with ValueEdge is a core market area of customer need and interest for OpenText to evolve and leverage moving into 2024 and beyond, with a key focus on needed governance.

## Challenges

The sheer size of OpenText's software portfolio can be difficult to navigate as leadership transitions the organization, and pivoting a massive organization like OpenText can take time, though OpenText World 2023 showed excellent vision and execution. At the same time, OpenText PPM tends to be less visible than other products in the portfolio; as an example, its role as part of Aviator DevOps is more implicit, and DevOps narrows the broader business execution opportunities both for PPM and for VE Strategy, potentially. That said, OpenText states that it is leveraging PPM internally for initiatives in its PMO and R&D organization to implement the OpenText road mapping tool across over 400 products in the company's portfolio, giving increased visibility inside the organization. Other challenges have included higher price points (mitigated to some extent by targeted, packaged offerings; new pricing models; significant discounting; named and concurrent licenses; and SaaS alternatives). While OpenText has improved usability and accessibility in many areas, the lack of an intuitive interface, particularly for older modules, is a challenge. Importantly, OpenText provides the opportunity for revitalization under engaged executive leadership for the software business in general and the VE Strategy, VE Agile, and PPM product line to focus and expand execution with R&D and new branding. IDC is encouraged by OpenText software leadership moving into 2024, strengthening and evolving combined portfolio capabilities along with needed proactive customer and partner outreach.

## 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

This IDC MarketScape unites the areas of strategic portfolio management (SPM) and IT project and portfolio management (IT PPM) as a combined assessment. These represent a competitive submarket of the larger project and portfolio management (PPM) functional market, revenue from agile automation from the software change, configuration and process management (SCCPM) market, and also revenue from team collaborative applications. For an intuitive on-ramp, ease of engagement, and collaboration with team management capabilities, we are also including vendors with presence and revenue in the team collaborative applications market.

### *Strategic Portfolio Management*

Strategic portfolio management is a dynamic framework for agile business and technology capabilities management, with a holistic view of the enterprise and its ecosystems, enabling business adaptation, resilience, innovation, and acceleration in a fast-changing context. SPM must be continuous, collaborative, and contextual to optimize strategic business alignment and execution, encompassing areas such as adaptive planning (including value stream management [VSM] and other capabilities) as well as needed process and organizational change for systemic adoption across roles. A key point is

the inclusion of "ecosystem" – some SPM definitions don't (but should) include ecosystem, which is necessary for portfolio management to be strategic.

Adaptation, resilience, innovation, and acceleration drive optimized business outcomes (all four have been key as we evolve for digital innovation) along with the ability of SPM systems to be continuous, collaborative, and contextual. Process and organizational change enable adoption and must be part of strategy (so mentioned in the definition).

### **IT PPM**

IT PPM tools facilitate joint business/IT planning. High-end IT PPM 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, resource, portfolio, program, process, demand, workflow, and financial management for IT. Additional key functionality includes application portfolio and service portfolio management – integration between the IT project and IT asset portfolios for software provisioning for DevOps (ALM, continuous release, etc.).

### **Agile PPM**

IDC's focus on agile PPM provides visibility into agile-specific capabilities for projects. Agile promotes adaptive planning, evolutionary development and delivery, and a time-boxed iterative approach that encourages rapid and flexible responses to change. IDC sees agile approaches moving beyond software development increasingly and being applied to non-IT business and other projects (including continuous flow). Sample Agile methodologies and approaches include Lean, Kanban, Extreme Programming (XP), Scrum, Agile Modeling, Feature-Driven Development (FDD), Scaled Agile Framework (SAFe) 6.X, Large Scale Scrum (LeSS), and Disciplined Agile Delivery (DAD). Agile PPM automated software can be used for automating, managing, estimating, tracking, optimizing, and reporting on initiatives that incorporate time-boxed, iterative approaches to completion.

### **Team Collaboration Applications**

Team collaboration applications (TCA) provide a workspace and an integrated set of web-based tools for ad hoc, unstructured, asset-centric, or document-centric collaboration between groups or individuals between known domains. A TCA can be represented by secure "channels" or "rooms" that contain documents, chat history, and transaction history to maintain a persistent auditable history or a more multipurpose shared workspace where users are able to store, access, and share files. Administration is primarily performed by a known user (that governs access rules), but IT administration controls/management may also be possible. TCA solutions may also allow directory integration, policy management, and integration with social collaboration tools (content shared within the social context of newsfeeds or groups). Communication within the TCA environment is mostly asynchronous, business to business (B2B), and closed to a specific set of eyes (see *Worldwide Team Collaboration Application Market Shares, 2021: Connecting the Whole Enterprise*, IDC #US49552022, August 2022; *Worldwide Collaborative Applications Market Shares, 2022: The Rise of the Multiplayer Enterprise*, IDC #US51018123, July 2023).

## LEARN MORE

---

### Related Research

- *IDC MarketScape: Worldwide Collaborative Work Management 2023-2024 Vendor Assessment – Uniting Teams and Data for Flexible Work* (IDC #US49434923, December 2023)
- *IDC MarketScape: Worldwide Value Stream Management and Agile Project and Portfolio Management 2023-2024 Vendor Assessment – Leveraging AI for Dynamic, Agile Value Creation* (IDC #US49436723, December 2023)
- *IDC MarketScape: Worldwide Cloud Project and Portfolio Management 2023-2024 Vendor Assessment* (IDC #US49434823, December 2023)
- *Worldwide Project and Portfolio Management Software Market Shares, 2022: Demand for Collaboration, Agile, and Strategic Portfolio Management Drives Continued Double-Digit Growth* (IDC #US49416023, June 2023)
- *Worldwide Project and Portfolio Management Software Forecast, 2023-2027: Strategic Planning, Collaboration, and AI Enable Dynamic Growth* (IDC #US49415723, June 2023)

### Synopsis

This IDC study uses the IDC MarketScape vendor assessment model to evaluate the strategic portfolio management (SPM) market, in conjunction with 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 PM 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 rapidly evolving artificial intelligence (AI) and ML and, recently, especially massive adoption and increased automation capabilities for GenAI. 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 15 vendors assessed, with some user reference context. This analysis complements the IDC MarketScape evaluations with assessments for value stream management (VSM) and agile PPM, cloud PPM, and collaborative work management (CWM), which enable three additional weighted IDC MarketScape views (for a total of four distinct IDC MarketScape PPM-related vendor evaluations).

"IDC continues to see expanding adoption of SPM to optimize business execution and innovation and 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, complex DevOps initiatives, with GenAI and copilots playing a vastly increasing role over the past 12 months moving into 2024," said Melinda Ballou, research director, 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 value management, hybrid and scaled agile for businesses, and end-to-end DevOps approaches with SPM and IT PPM helping focus teams with targeted execution, cutting delays to benefit, and improving value metrics and analytics with evolving AI capabilities on the other. It is in part due to these trends that IDC has chosen to prioritize this area

as one of four 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

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

## Global Headquarters

140 Kendrick Street  
Building B  
Needham, MA 02494  
USA  
508.872.8200  
Twitter: @IDC  
blogs.idc.com  
www.idc.com

---

### Copyright and Trademark Notice

This IDC research document was published as part of an IDC continuous intelligence service, providing written research, analyst interactions, and web conference and conference event proceedings. Visit [www.idc.com](http://www.idc.com) to learn more about IDC subscription and consulting services. To view a list of IDC offices worldwide, visit [www.idc.com/about/worldwideoffices](http://www.idc.com/about/worldwideoffices). Please contact IDC report sales at +1.508.988.7988 or [www.idc.com/?modal=contact\\_repsales](http://www.idc.com/?modal=contact_repsales) for information on applying the price of this document toward the purchase of an IDC service or for information on additional copies or web rights.

Copyright 2023 IDC. Reproduction is forbidden unless authorized. All rights reserved.

248-000013-001

