

The Forrester Wave™: Application Release Automation, Q2 2015

by Amy DeMartine and Kurt Bittner, April 14, 2015

KEY TAKEAWAYS

I&O Pros Are Turning Toward Release Automation To Reduce Complexity

Increasing application and environment complexity is outstripping release managers' ability to manually manage application deployment and environment configurations. Release automation tools simplify application and environment modeling while giving you more control.

Modeling And Pipeline Management Are Essential Differentiators

Manual processes and scripting are too unreliable and unsustainable to support the increasing demands for faster application releases. The best application release automation tools provide abstract modeling and pipeline management capabilities that make releases easier and more reliable.

Access The Forrester Wave Model For Deeper Insight

Use the detailed Forrester Wave model to view every piece of data used to score participating vendors and create a custom vendor shortlist. Access the report online and download the Excel tool using the link in the right-hand column under "Tools & Templates." Alter Forrester's weightings to tailor the Forrester Wave model to your specifications.

The Forrester Wave™: Application Release Automation, Q2 2015

The Seven Providers That Matter Most And How They Stack Up

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with [Eveline Oehrlich](#) and Michael Caputo

WHY READ THIS REPORT

In Forrester's 33-criteria evaluation of application release automation vendors, we identified the seven most significant software providers — Automic Software, CA Technologies, Electric Cloud, IBM, MidVision, Serena Software, and XebiaLabs — in the category and researched, analyzed, and scored them. This report details our findings about how well each vendor fulfills our criteria and where they stand in relation to each other to help infrastructure and operations (I&O) professionals select the right partner for their release automation requirements.

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Forrester conducted product evaluations between January and March 2015 and interviewed seven companies: Automic Software, CA Technologies, Electric Cloud, IBM, MidVision, Serena Software, and XebiaLabs.

Related Research Documents

- [The Eight Tenets Of Faster Application Delivery](#)
- [Gear Up For Modern Service Delivery](#)
- [Market Overview: Application Release Automation Tools](#)



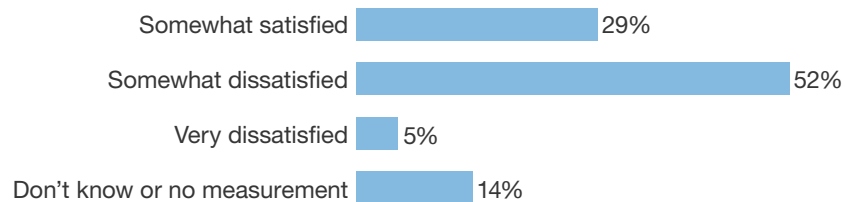
FASTER APPLICATION RELEASE IS A CRITICAL BUSINESS DIFFERENTIATOR

Customers have never been more empowered. Brand loyalty has given way to experience loyalty; when customers' needs are not met, they switch allegiances without a thought. Therefore many companies are focusing on delivering applications faster to improve customer experiences and meet these rising expectations.¹ However, faster delivery merely leads to faster disappointment when the software delivery process is shoddy. Application release automation tools remove errors from manual processes by standardizing and automating the movement of applications between environments. Application release automation is the critical final step in the delivery pipeline of applications to improve the customer experience.

Automating the release of applications is a key pain point for I&O organizations today. In Forrester's Q4 2014 Modern Service Delivery Benchmark Survey, 5% of respondents said that their business partners were very dissatisfied with their release velocity, and 52% of respondents said the business was somewhat dissatisfied with release velocity (see Figure 1). The adoption rate of release automation tools mirrors these findings: Out of the 71% of respondents who said they were doing any release automation at all, only 20% were performing full release automation (see Figure 2). Clearly, adoption of release automation is in its infancy, but it needs to grow up fast to support superior customer experiences by continually delivering quality interactions and applications.

Figure 1 The Business Requires Better Release Velocity

“How satisfied do you think your business is with the time it takes to release new features or changes to customer facing business services or applications?”



Base: 42 global I&O professionals

Source: Forrester's Modern Service Delivery Benchmark Survey, Q4 2014

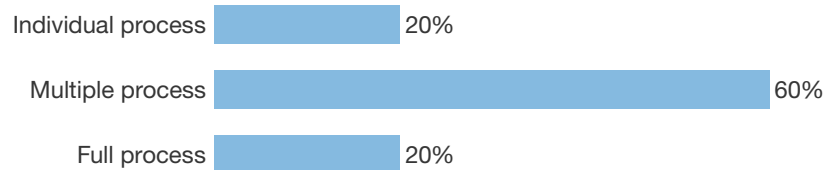
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Figure 2 Release Automation Is Still In Its Infancy

“Please choose the following life-cycle stage(s) that are automated in relation to customer-facing business services and applications.”

“Based on the types of automation that you identified that your organization uses, please select the level of automation that most closely resembles your environment today across all life-cycle stages.”



Base: 42 global I&O professionals

Source: Forrester’s Modern Service Delivery Benchmark Survey, Q4 2014

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HOW WE ASSESSED THE VENDORS IN THIS IMPORTANT BUT EVOLVING MARKET

To assess the state of the application release automation market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of seven vendor offerings.

Vendors With Abstraction And Automation Capabilities Earned High Scores

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 33 criteria, which we grouped into three high-level categories:

- **Current offering.** All of the evaluated vendors provide strong automation capabilities; we believe that the differentiator is abstraction. Abstraction reduces complexity and cost by describing what you need to achieve rather than dictating how you can achieve it. Therefore, our analysis looked for vendors that provide abstraction for creating models, moving releases, and visualizing and integrating the pipeline across the life cycle. For example, abstract modeling of an application allows a release engineer to assemble middleware, infrastructure, applications, and configuration from reusable parts and control what the model contains without having to edit the deployment plan process flow for every change.
- **Strategy.** To assess strategy, we looked for the following: 1) innovation through vision and planned enhancements; 2) extensibility through ability to control the product and the product’s ability to control; 3) reusability through third-party plug-ins; and 4) pricing strategies that resonate with buyer needs.

- **Market presence.** To score market presence, we analyzed three key areas: 1) growth of the product; 2) stability of the company measured by profitability; and 3) install base with an emphasis on number of enterprise clients.

Evaluated Vendors Have An Extensive Feature List

Forrester included seven vendors in the assessment: Automic Software, CA Technologies, Electric Cloud, IBM, MidVision, Serena Software, and XebiaLabs. Each of these vendors has (see Figure 3):

- **Established itself as a leading ARA vendor.** The vendors’ tool(s) support at least 85% of the specified creating and moving releases features.²
- **Sparked interest from Forrester’s client base.** Each vendor has demonstrated continuing interest from Forrester’s client base in the form of regular mentions and inquiries from Forrester clients.

Figure 3 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Product version evaluated
Automic	One Automation	11.0
CA Technologies	CA Release Automation	5.5
Electric Cloud	ElectricFlow Deploy	5.3
IBM	IBM UrbanCode Deploy	6.1.1.1
	IBM UrbanCode Deploy with Patterns	6.1.1.1
	IBM UrbanCode Release	6.1.1.1
MidVision	RapidDeploy	3.5
Serena Software	Serena Deployment Automation	5.1.3
XebiaLabs	XebiaLabs XL Deploy	4.5.1

Vendor selection criteria

Leading ARA vendor: The vendors' tool(s) support at least 85% of the specified creating and moving releases features.

Interest from Forrester’s client base. Each vendor has demonstrated continuing interest from Forrester’s client base in the form of regular mentions and inquiries from Forrester clients.

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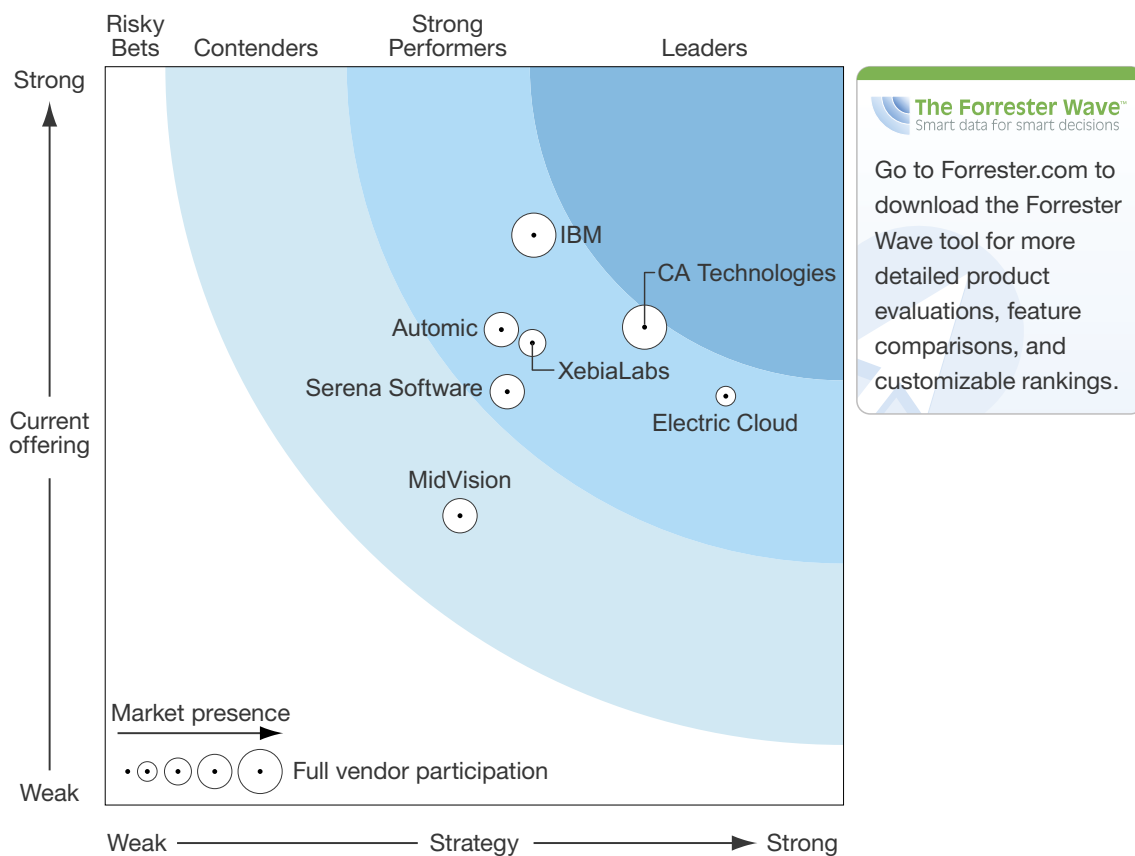
VENDORS STRIKE A BALANCE BETWEEN ABSTRACTION AND EXECUTION

This evaluation uncovered a market in which (see Figure 4):

- **Electric Cloud, CA, IBM, XebiaLabs, Automic, and Serena Software are Strong Performers.** These vendors are Strong Performers because they can cover the basics well and they offer abstraction across modeling, moving releases, and pipeline management.
- **MidVision lacks abstraction.** MidVision offers less abstraction than the Strong Performers. It provides compelling features around moving releases but with more varied support of modeling and pipeline management.

This evaluation of the application release automation market is just a starting point. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

Figure 4 Forrester Wave™: Application Release Automation, Q2 '15



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Figure 4 Forrester Wave™: Application Release Automation, Q2 '15 (Cont.)

	Forrester's Weighting	Automic	CA Technologies	Electric Cloud	IBM	MidVision	Serena Software	XebiaLabs
CURRENT OFFERING	50%	3.22	3.24	2.77	3.86	1.96	2.80	3.13
Release package modeling	30%	2.20	2.60	2.80	3.20	0.80	2.00	3.20
Moving releases	40%	3.15	3.60	3.00	4.00	2.80	2.40	3.35
Release planning and management	20%	4.00	3.60	1.65	4.50	3.00	4.20	3.15
Integration with the MSD life cycle	10%	5.00	3.00	4.00	4.00	0.00	4.00	2.00
STRATEGY	50%	2.68	3.65	4.20	2.90	2.40	2.72	2.89
Vision	15%	3.00	3.00	3.00	1.00	0.00	1.00	5.00
Planned enhancements	20%	1.00	3.00	5.00	3.00	1.00	3.00	1.00
Extensibility	25%	3.00	4.00	5.00	5.00	4.00	3.00	4.00
Controllability	10%	3.00	3.00	4.00	0.00	3.00	2.00	4.00
Scalability	10%	5.00	5.00	5.00	1.00	3.00	1.00	1.00
Out-of-the-box third-party plug-ins	10%	3.00	5.00	5.00	5.00	1.00	5.00	1.00
Cost	10%	1.80	3.00	1.00	3.00	5.00	4.20	3.40
MARKET PRESENCE	0%	3.50	4.80	1.30	4.50	2.10	3.70	2.70
ARA growth rate (year-over-year)	20%	5.00	4.00	4.00	4.00	3.00	3.00	4.00
Corporate profitability	30%	5.00	5.00	0.00	4.00	3.00	5.00	0.00
Installed base	50%	2.00	5.00	1.00	5.00	1.20	3.20	3.80

All scores are based on a scale of 0 (weak) to 5 (strong).

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VENDOR PROFILES

Strong Performers

- **Electric Cloud.** ElectricFlow Deploy automates and standardizes application deployments throughout the software delivery process. ElectricFlow Deploy has strong abstraction for integration with the modern service delivery (MSD) life cycle and sound abstraction in moving releases. Also, ElectricFlow Deploy has strong overall support for strategy.
- **CA Technologies.** CA Release Automation is a continuous delivery solution to orchestrate and automate complex application release deployments from development through production. CA Release Automation does not have strong support in targeted areas but does have a sound strategy and strong current features.
- **IBM.** UrbanCode Application Release Automation (ARA) Solution includes IBM UrbanCode Deploy, UrbanCode Deploy with Patterns, and UrbanCode Release. IBM UrbanCode Deploy orchestrates and automates the deployment of applications, databases, and configurations into development, test, and production environments. UrbanCode Deploy with Patterns' environment management capabilities enable users to design, deploy, and update full-stack environments on multiple clouds. UrbanCode Release aids in release planning and pipeline management. IBM UrbanCode ARA Solution has strong abstraction in moving releases, release planning and management, and integration with the MSD life cycle.
- **Xebialabs.** XL Deploy is an automation solution for DevOps and continuous delivery teams. XL Release, which contains support for pipeline management, was not included in this evaluation but orchestrates deployments. XL Deploy has sound abstraction in release package modeling, moving releases, and release planning and management.
- **Automic Software.** The Automic One Automation platform is an end-to-end solution for planning, coordinating, and automating software release processes, including automated deployment of applications across large-scale server environments. The Automic One Automation platform shows strong abstraction in release planning and management and integration with the MSD life cycle.
- **Serena Software.** Serena Deployment Automation provides application-centric deployment automation across all environments. Serena Deployment Automation shows strong abstraction in release planning and management and integration with the MSD life cycle.

Contender

- **MidVision.** MidVision RapidDeploy automates the deployment, configuration, and release of middleware, applications, and databases. MidVision RapidDeploy has sound abstraction in release planning and management.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 4 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of two data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to <http://www.forrester.com/marketing/policies/forrester-wave-methodology.html>.

Survey Methodology

Forrester hosted the Q4 2014 Global Modern Service Delivery Benchmark Online Survey to 400 individuals. These individuals work in IT roles (not including application development, enterprise architecture, security, or sourcing/vendor management) and are involved with customer-facing business services/applications for their opinions on the current state of modern service delivery and DevOps. These respondents were narrowed down to those in managerial positions in IT/tech companies, worldwide, with over 1,000 employees.

Integrity Policy

All of Forrester's research, including Forrester Waves, is conducted according to our Integrity Policy. For more information, go to <http://www.forrester.com/marketing/policies/integrity-policy.html>.

ENDNOTES

- ¹ For more information about software and its ability to meet customer expectation gaps, please see the “[The Software-Powered Business](#)” Forrester report.
- ² For more information on features you should consider when evaluating application release automation tools, please see the “[Market Overview: Application Release Automation Tools](#)” Forrester report.

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