Magic Quadrant for DevOps Platforms

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DevOps platforms provide software engineering teams with an integrated set of capabilities that improve developer experience across the SDLC and enable teams to rapidly deliver software. This research evaluates DevOps platform vendors to help leaders make buying decisions.

Market Definition/Description

Gartner defines DevOps platforms as those that provide fully integrated and orchestrated capabilities to enable continuous delivery of software using agile and DevOps practices. The capabilities span the development and delivery life cycle built around the continuous integration/continuous delivery (CI/CD) pipeline, including planning, creation, artifact management, security, quality engineering, change management, compliance, environment management, deployment and monitoring. DevOps platforms support team collaboration, consistency, tool simplification and measurement of software delivery metrics. They are delivered primarily as cloud-hosted services with some options for on-premises deployment.

DevOps platforms simplify the creation, maintenance and management of the components required for the delivery of various types of modern software. Platforms create common workflows and data models, simplify user access, provide production-like development and test environments, and provide a consistent user experience (UX) to reduce cognitive load. They lead to improved visibility, auditability and traceability for the software delivery value stream. This end-to-end view encourages a systems-thinking mindset and accelerates feedback loops.

Organizations use DevOps platforms to minimize tool friction resulting from complex toolchains, manual handoffs and lack of consistent visibility throughout the software development life cycle (SDLC). This enables product teams to deliver faster customer value without compromising quality. The DevOps platforms market reflects the consolidation of technologies across development, security, infrastructure and operations to streamline software delivery.

DevOps platforms support multiple use cases, including, but not limited to:

- Agile software delivery — Operationalize agile development practices.
- Cloud-native application delivery — Build and deliver cloud-native applications across hybrid and multicloud environments.
- GitOps — Support the operation of applications using declarative constructs stored in Git in a closed-loop, automated system.
- MLOps — Provide support for the management of machine learning (ML) models including versioning and feedback loops.
- Platform engineering — Provide self-service, internal developer platforms to scale DevOps and software engineering practices.
- Regulated delivery — Support for compliance, auditing, traceability and governance.

Mandatory Features

- Continuous integration via native support for build automation and the orchestration of verification and validation functions such as test automation, security scans and compliance scans
- Continuous delivery and release orchestration including both ungated continuous deployment and release orchestration with gated approval mechanisms (e.g., to meet regulatory requirements)
- Delivery of web applications including, but not limited to, containerized applications

Common Features

- Product management and insights:

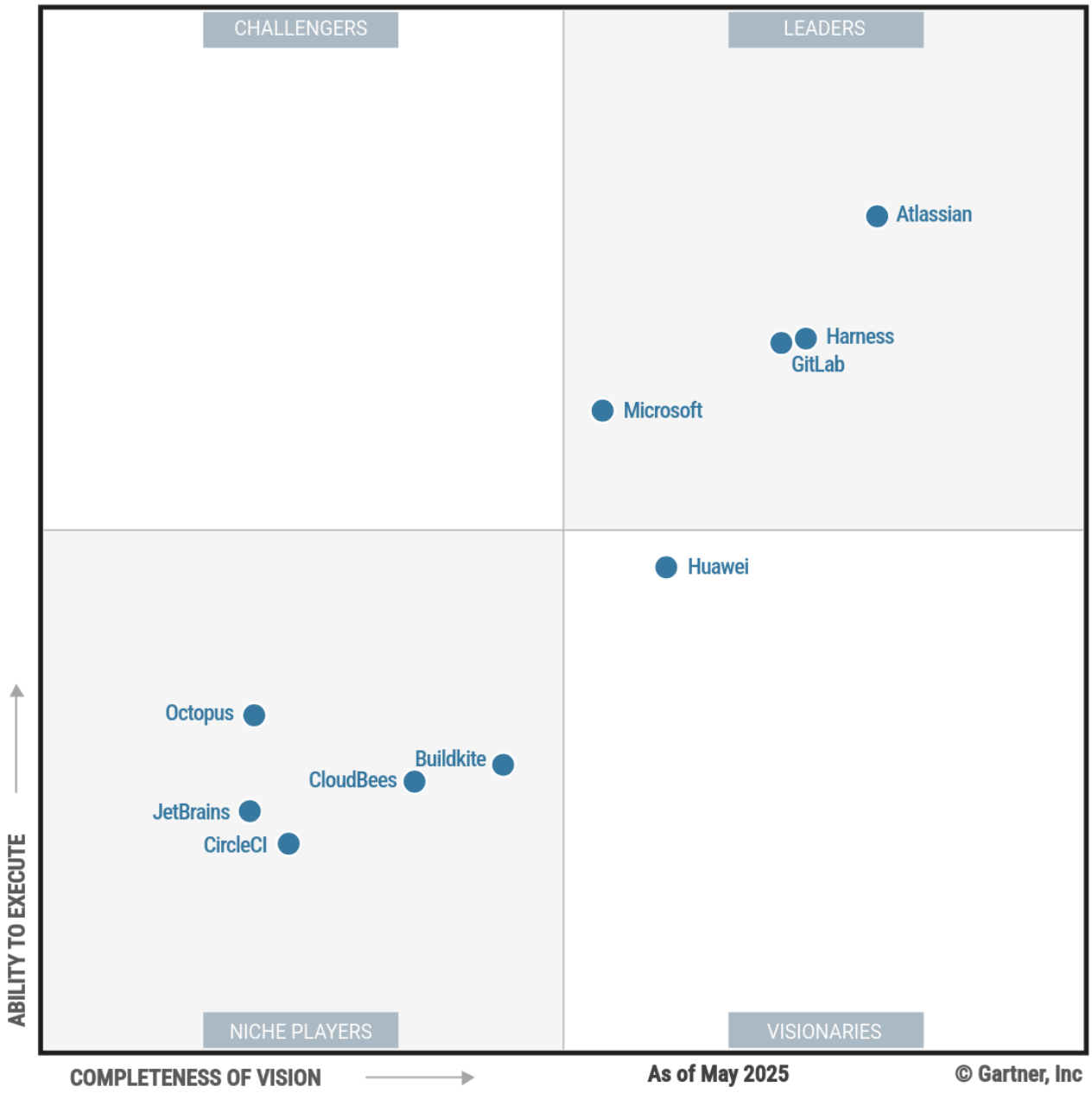
    - Agile planning, including product planning, managing features and defects, roadmapping, backlog management, Kanban and Scrum
    - Feature management, including feature flag management and experimentation
    - Software engineering intelligence (SEI), including value stream analytics, flow metrics, DORA metrics, developer productivity metrics (SPACE framework support), developer experience metrics (DevEx framework support)
- Development support:
    - Integrated development environments (IDEs)
    - Unit testing framework support
    - Code review facilitation
    - Package management
    - Static code analysis
    - Internal developer portal
- Artifact management:
    - Source code repository
    - Artifact repository
    - Container registry
    - Software bill of materials (SBOM) support
- Quality engineering:
    - Performance testing, chaos testing, fuzz testing, and automated acceptance testing
    - Test case management
    - Code coverage analysis
    - Test platform support
    - Test data management

    - Test suite optimization
- Change management:
    - Release management
    - Policy management
- Environment provisioning and management:
    - Cloud platform environment provisioning and management
    - Infrastructure provisioning
    - Configuration management
    - Configuration drift detection
    - Infrastructure as code
- Application monitoring and observability:
    - Collection of production telemetry (e.g., logs, metrics, events, traces)
    - Automated incident response support
    - Customer feedback collection
- Team collaboration:
    - Visualization of development workflows
    - Knowledge base
    - Communication via messaging/chat
- Orchestration of security functions:
    - Threat modeling
    - Security requirements
    - Secure coding practices
    - Software supply chain security
    - Security testing

    - Web application and API protection
    - Runtime application security
- AI augmentation:
    - AI-assisted and AI-powered continuous integration and deployment
    - Process optimization
    - Analysis of SEI and telemetry data

Magic Quadrant

Figure 1: Magic Quadrant for DevOps Platforms



Gartner

Vendor Strengths and Cautions

Atlassian

Atlassian is a Leader in this Magic Quadrant. It offers the Atlassian DevOps Platform, which includes Bitbucket, Compass, Confluence, Jira, Jira Product Discovery and Jira Service Management. The Atlassian DevOps Platform can be deployed as SaaS or on-premises.

Atlassian's operations are geographically diversified, and it has clients of all sizes across all sectors. Since 2024, Atlassian has introduced Rovo, a set of AI capabilities that includes chat, search and agents. These capabilities are integrated into its platform and teamwork graph, and incorporate data from multiple apps.

Strengths

- **Market understanding:** Atlassian has a comprehensive view of the DevOps platforms market, helping it to address the evolving needs of customers across IT and business.
- **Business model:** Atlassian's marketplace lets customers extend the platform's functionality with a wide variety of third-party apps.
- **Customer experience:** Atlassian provides effective customer satisfaction improvement programs. Service-level agreements for its hosted platform provide higher availability commitments compared to those of other vendors in this Magic Quadrant.

Cautions

- **Sales strategy:** Atlassian sells via a combination of web-based direct sales, partner-led sales and enterprise sales. Customers report via Gartner inquiry that the discount levels, license eligibility and negotiable items (such as license term duration) vary confusingly between these channels. Customers should choose their sales channel carefully; licensed partners are the best choice for most customers.
- **Product strategy:** Atlassian is focused on enhancing its SaaS products, leading to a growing feature disparity between its Cloud and Data Center (on-premises) editions. Customers choosing Atlassian's on-premises products must ensure that the features they want are available in those products.
- **Product execution:** Atlassian's software security assurance capabilities, such as vulnerability testing, are less comprehensive relative to other Leaders in this Magic Quadrant. Customers may need to augment Atlassian's platform with third-party security tools.

Buildkite

Buildkite is a Niche Player in this Magic Quadrant. It offers the Buildkite DevOps Platform, which includes Mobile Delivery Cloud, Package Registries, Pipelines and Test Engine. Buildkite can be deployed as SaaS or hybrid SaaS. Buildkite uses a hybrid-first architecture with a SaaS control plane managed by Buildkite and build agents that run within the customer's infrastructure. Fully managed options are also available for teams preferring hosted environments.

Buildkite's operations are primarily based in Australia and North America. Its clients tend to be of all sizes across many sectors, with the greatest concentration in the technology sector. Since 2024, Buildkite has added its Package Registries capabilities, which include artifact management.

Strengths

- **Product execution:** Buildkite's highly scalable build agent architecture cuts software development cycle times and enhances developer experience. Customers with larger or more complex software development organizations tend to benefit the most.
- **Marketing strategy:** Buildkite has an effective strategy for delivering its message to its target customers, emphasizing the benefits of its scalability. Customers gain a good understanding of how Buildkite fits into their internal DevOps strategy.
- **Market understanding:** Buildkite demonstrates a good understanding of the entire DevOps platforms market. This benefits customers because Buildkite is able to plan its product's evolution to align with that of its larger competitors.

Cautions

- **Geographic strategy:** Buildkite's hosted infrastructure is located in the U.S. and EU. Customers can run build agents in their own region, and source code and secrets remain within their infrastructure. Customers should verify Buildkite's compliance with their data residency and disaster recovery requirements.
- **Customer experience:** Buildkite offers 24/7 support and formal SLAs for enterprise clients only. Customers should ensure that Buildkite meets their support needs.
- **Product strategy:** Buildkite addresses only specific aspects of the CI/CD process; for example, environment management is not present. Customers will need to integrate Buildkite with additional tools or DevOps platforms to establish a complete CI/CD pipeline.

CircleCI

CircleCI is a Niche Player in this Magic Quadrant. It offers CircleCI, which includes support for hosted and managed build infrastructure, self-hosted runners, test automation, insights into build performance and support for the CI/CD of LLM-enabled apps. CircleCI can be deployed as SaaS or on-premises.

CircleCI's operations are geographically diversified. Its clients tend to be of all sizes across many sectors, with the greatest concentration in the technology sector. Since 2024, CircleCI has added generative AI, MLOps, FinOps and release orchestration capabilities.

Strengths

- **Market responsiveness and record:** CircleCI has monitored and responded to the changing needs of its users, such as by increasing the flexibility of pipeline and project configuration. Customers benefit from new product features that are particularly relevant.
- **Operations:** CircleCI has a strong online user community. Customers gain access to peer support and the ability to offer feedback.
- **Marketing execution:** CircleCI uses clear and relevant messaging to communicate its value proposition to technical audiences. Customers gain a good understanding of how CircleCI can benefit technical users.

Cautions

- **Sales execution/pricing:** While achieving profitability in 2024, CircleCI has seen a significant decline in growth, in terms of new customers and new seats, since 2022. Customers should ensure that CircleCI meets their criteria for a viable partner.
- **Geographic strategy:** CircleCI's cloud data centers are limited to the U.S. Customers should verify CircleCI's compliance with their data residency requirements.
- **Innovation:** CircleCI has not created innovative product capabilities that significantly differentiate it from its competitors. Customers may find that other vendors are first to market with new features.

CloudBees

CloudBees is a Niche Player in this Magic Quadrant. It offers CloudBees, which includes CloudBees CI, CloudBees Continuous Delivery and Release Orchestration (CD/RO), and CloudBees Security and Compliance. CloudBees can be deployed as SaaS or on-premises.

CloudBees' operations are mainly in North America and EMEA, and its clients tend to be of all sizes across many sectors. Since 2024, CloudBees has continued to consolidate its tools into one platform, added smart test selection via its Launchable acquisition, and strengthened its support for audit and compliance.

Strengths

- **Product execution:** CloudBees strongly supports Jenkins, a well-known open-source CI/CD tool. Customers using Jenkins at scale or for critical applications will benefit from CloudBees' expertise.
- **Customer experience:** CloudBees follows a comprehensive system-hardening approach that provides strong security of its hosted offering relative to other vendors in this Magic Quadrant.
- **Marketing execution:** CloudBees generates a high level of interest among Gartner clients compared with other vendors in this Magic Quadrant.

Cautions

- **Geographic strategy:** CloudBees has cloud data centers in the U.S. only. Customers should ensure that CloudBees meets their data residency requirements.
- **Sales execution/pricing:** CloudBees has added very few new customers in the past three years compared with other vendors in this Magic Quadrant. Customers should remain vigilant regarding CloudBees' long-term viability.
- **Market responsiveness and record:** CloudBees has made only minor, incremental product enhancements in the past year compared with other evaluated vendors. Customers should verify that CloudBees' planned product features will meet their anticipated needs.

GitLab

GitLab is a Leader in this Magic Quadrant. It offers GitLab, which includes capabilities for planning, source code management, CI, deployment automation, observability, application security testing, software supply chain security, compliance reporting, value stream analytics and incident management. GitLab can be deployed as SaaS or on-premises.

GitLab's operations are geographically diversified, and its clients tend to be of all sizes across all sectors. Since 2024, GitLab has continued to strengthen its application security testing capabilities and its generative AI and agentic AI capabilities in conjunction with Amazon Q.

Strengths

- **Product strategy:** GitLab has a broad product strategy and has expanded its offerings around integrated security, compliance and feature management. Customers benefit from a comprehensive platform and reduced need for third-party products.
- **Market understanding:** GitLab has a strong and comprehensive vision for the future of the DevOps platform market, and is developing its capabilities to support it. Customers are able to plan their own DevOps strategy accordingly.
- **Marketing strategy:** GitLab evolves its go-to-market approach effectively as market conditions change. Customer gains include competitive services and postsale customer success programs.

Cautions

- **Sales strategy:** GitLab offers less aggressive pricing and discounts compared with other vendors in this Magic Quadrant. Customers may need to negotiate for competitive pricing.
- **Marketing execution:** GitLab's marketing messages often emphasize technical features rather than providing compelling use cases and strategic value. Some potential customers may find it difficult to understand GitLab's value proposition.
- **Customer experience:** GitLab's service-level agreements offer somewhat lower availability targets compared with the SLAs of other vendors in this Magic Quadrant.

Harness

Harness is a Leader in this Magic Quadrant. It offers the Harness platform, which includes AI Test Automation, Artifact Registry, Chaos Engineering, Cloud Cost Management, Cloud Development Environments, Code Repository, Continuous Integration, Continuous Delivery & GitOps, Database DevOps, Feature Management & Experimentation, Incident Response, Infrastructure as Code Management, Internal Developer Portal, Security Testing Orchestration, Service Reliability Management, Software Engineering Insights, and Supply Chain Security. Harness can be deployed as SaaS or on-premises.

Harness' operations are in North America, Europe, Latin America and India, and its clients tend to be of all sizes across all sectors. In 2024, Harness acquired Armory, a continuous delivery vendor, and Split, a feature management vendor.

Strengths

- **Product strategy:** Harness advances its product through internal entrepreneurship, which develops independent components on top of a common platform. Customers benefit from a modular but consistent offering that they can adopt at their own pace based on where they find value.
- **Business model:** Harness has built a strong ecosystem including open-source products and third-party marketplace partners. Customers benefit from additional sources of innovation and product capabilities.
- **Market understanding:** Harness has a broad vision for the DevOps platforms market that includes leveraging its strong ecosystem and addressing security and developer experience.

Cautions

- **Geographic strategy:** Harness offers limited cloud region deployment options compared with other vendors in this Magic Quadrant. Customers should confirm that the Harness platform meets their data residency and disaster recovery requirements.
- **Marketing execution:** Harness' marketing messages to senior management are less effective compared with those of other vendors in this Magic Quadrant. Customers in roles such as software engineering leadership may need to build business cases to gain senior management support for Harness.
- **Marketing strategy:** Harness' marketing strategy is less mature compared to other vendors in this Magic Quadrant, and customers may not gain additional value from its go-to-market programs.

Huawei

Huawei is a Visionary in this Magic Quadrant. It offers CodeArts, which includes Application Operations Management, Application Performance Management, Artifact, Board, Build, Check, Deploy, Governance, IDE, IDE Online, Inspector, Log Tank Service, Modeling, Pangu Doer, PerfTest, Pipeline, Req, Repo, ServiceStage and TestPlan. CodeArts can be deployed as SaaS or on-premises.

Huawei's operations are mainly in China, and its clients tend to be of all sizes across all sectors. Since 2024, Huawei has enhanced its AI assistant, CodeArts Doer (previously Pangu Doer), and has increased its open-source software governance capabilities.

Strengths

- **Product strategy:** Huawei offers a product with both breadth and depth of capability. Customers benefit from a full-featured platform, reducing the need for third-party components.
- **Overall viability:** Huawei is a very large company with a diverse portfolio and strong financials, and uses CodeArts internally. Customers benefit from Huawei's ability to invest in its platform.
- **Business model:** Huawei has built a strong platform and customer ecosystem. Customers will find a wide range of plug-ins, extensions and integrations.

Cautions

- **Operations:** Huawei's operations are concentrated in the Chinese mainland. Customers outside of that region should ensure that Huawei can meet their needs for data residency and related regulations.
- **Geographic strategy:** Huawei's customer base is heavily within China, or with Chinese companies expanding internationally; therefore, non-Chinese customers should ensure that Huawei's language support, local partners and user communities meet their needs.
- **Marketing execution:** Huawei's marketing messages for its DevOps platform are less effective across various roles compared with those of other vendors in this Magic Quadrant. Potential customers may find it more difficult to understand Huawei's value proposition.

JetBrains

JetBrains is a Niche Player in this Magic Quadrant. It offers the JetBrains DevOps Platform, which includes Qodana, for code quality; TeamCity, for CI/CD; and YouTrack, providing planning features. JetBrains' products can be deployed as SaaS or on-premises.

JetBrains' operations are geographically diversified. It does not disclose the size or nature of its clients.

Since 2024, JetBrains has enhanced its AI capabilities and added a plug-in marketplace for its YouTrack project management tool.

JetBrains did not respond to requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Operations:** JetBrains has a strong user community, including an active online forum. Customers therefore gain an additional source of support.
- **Product execution:** JetBrains uses and contributes to various open-source software, such as Kotlin. Customers who use the open-source software benefit directly, and all customers benefit from the development and support provided by the open-source community.
- **Market responsiveness and record:** JetBrains consistently responds to changes in the market by introducing new product capabilities. Its product roadmaps reflect user feedback and lessons learned from observing customer usage.

Cautions

- **Innovation:** JetBrains continues to show little innovation in its DevOps tools. Customers find that other vendors are first to market with new features.
- **Product strategy:** JetBrains has a narrower product strategy compared with other vendors in this Magic Quadrant, focusing on developer-centric capabilities. Customers find that this does not address the needs of all their users.
- **Sales execution/pricing:** JetBrains has not demonstrated strong sales of its DevOps platform and has discontinued other offerings due to lower-than-expected adoption. Prospective customers should ensure that JetBrains remains committed to the product.

Microsoft

Microsoft is a Leader in this Magic Quadrant. It offers two platforms: GitHub and Azure DevOps. GitHub includes GitHub Actions, GitHub Advanced Security, GitHub Codespaces, GitHub Copilot and GitHub Models. Azure DevOps includes Azure Artifacts, Azure AI Foundry, Azure Monitor, Azure Pipelines and Visual Studio Code. Both GitHub and Azure DevOps can be deployed as SaaS or on-premises.

Microsoft's operations are geographically diversified, and it has clients of all sizes across all sectors. Since 2024, Microsoft has expanded its agentic DevOps capabilities with

investments in its GitHub Copilot AI agent and added data residency options for GitHub customers in the EU, Australia and the U.S.

Strengths

- **Overall viability:** Microsoft is the largest vendor in this research and has established a global presence in terms of research and development, sales and support, and cloud data center reach and capacity. Given its longevity and size, customers can be confident that Microsoft will sustain business continuity.
- **Business model:** Microsoft has built a strong ecosystem around its DevOps platform. Customers gain access to a very wide range of third-party products and services.
- **Marketing execution:** Microsoft continues to have the largest developer community of any vendor in this research and shows strong brand recognition, mind share and support for open-source development. Customers benefit from the sizable pool of talent skilled in Microsoft's tools and ecosystem.

Cautions

- **Innovation:** Microsoft has delivered fewer compelling innovations to its DevOps platform in 2024 compared with other leading vendors in this Magic Quadrant, choosing to emphasize its Copilot generative AI technology over broader DevOps advancements (for example, in CI/CD scalability or developer experience).
- **Marketing strategy:** Prospective customers continue to express confusion with Microsoft's messaging about GitHub and Azure DevOps. Microsoft is primarily focused on enhancing GitHub, although it continues to invest in Azure DevOps and plans to add feature integrations with GitHub. Customers should monitor Microsoft's strategy for its products.
- **Customer experience:** Microsoft has less-thorough customer satisfaction assurance measures compared with other vendors in this Magic Quadrant.

Octopus

Octopus is a Niche Player in this Magic Quadrant. It offers Octopus Deploy, which includes Codefresh and Codefresh GitOps Cloud. Octopus' products can be deployed as SaaS or on-premises.

Octopus's operations are geographically diversified, and it has clients of all sizes across all sectors. In 2024, Octopus acquired Codefresh, adding CI and GitOps capabilities to its product.

Strengths

- **Overall viability:** Octopus is profitable and showing growth. It appears to have the financial resources to continue to execute on its vision.
- **Marketing execution:** Octopus effectively communicates its marketing messages to practitioners and software engineering leaders, emphasizing speed and automation. Potential customers in these roles will be able to assess Octopus' value proposition.
- **Market responsiveness and record:** Octopus has introduced product features in response to its customers' changing needs, especially those who deploy software to many diverse tenants, such as in retail operations.

Cautions

- **Geographic strategy:** Octopus stores Codefresh analytics and logs only in a single U.S.-based cloud region. It does not allow customers to choose the cloud region in which other Codefresh components run. Potential customers selecting SaaS over the on-premises option should ensure that Octopus can satisfy their data residency and disaster recovery requirements.
- **Product strategy:** Octopus has yet to align Octopus Deploy and Codefresh in such areas as user experience, support, training and community, and has not announced a clear path for deeper integration between the two products. Potential customers of a combined solution should carefully evaluate these products to ensure that they both meet their needs in these aspects.
- **Sales strategy:** Octopus' pricing uses a subscription model based on the number of application deployment pipelines it calls "projects." In some configurations, this leads to less competitive pricing compared with other vendors in this Magic Quadrant.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not

necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

- Huawei
- Octopus

Dropped

- **Amazon Web Services:** Amazon Web Services has discontinued certain tools within its platform, such as CodeCommit, and has moved away from its DevOps platform offering.
- **JFrog:** JFrog no longer offers JFrog Pipelines and therefore no longer provides the functionality required for participation in this Magic Quadrant.
- **Red Hat:** Red Hat's DevOps capabilities are limited to building for and deploying to OpenShift in containers. It therefore does not provide the functionality required for participation in this Magic Quadrant.

Inclusion and Exclusion Criteria

Inclusion Criteria

To qualify for inclusion, providers need to meet the following criteria as of 1 January 2025:

Market Participation Inclusion Criteria

To be considered a participant in the market, each vendor must:

- Provide a dedicated, generally available (GA) DevOps platform as of 1 January 2025. General availability means the product or service is available on a public-facing price sheet/card for purchase directly by clients. Vendors must be able to furnish the link to a pricing page for their DevOps platform.
- Sell the solution directly to paying customers without requiring them to engage in professional services. Vendors must provide at least first-line support for these capabilities, including the use of bundled open-source software. This includes, but is not

limited to, comprehensive product documentation, installation guidance (e.g., build runners, Kubernetes cluster setup) and reference examples (e.g., in the case of pipelines as code).

- Demonstrate an active product roadmap, go-to-market and selling strategy for the solution, including all standard capabilities as described in the market definition.
- Have phone, email and web customer support. It must offer a contract, console/portal, technical documentation and customer support in English (either as the product's default language or as an optional localization).
- Have at least 15% of its paying customers in each of two of the three following geographic regions:

o U.S. and Canada

o Europe (including U.K. and Ireland)

o Asia/Pacific

Platform Capabilities Inclusion Criteria

The DevOps platforms must offer native support for the following standard capabilities as described in

the market definition:

- Continuous integration via native support build automation and the orchestration of verification and validation functions such as test automation, security scans and compliance scans
- Continuous delivery and release orchestration including both ungated continuous deployment and release orchestration with gated approval mechanisms (e.g., to meet regulatory requirements)
- Delivery of web applications including, but not limited to, containerized applications.

In addition, the vendor must rank among the top 20 organizations in the Customer Interest Indicator (CII) defined by Gartner for this Magic Quadrant. The CII for this Magic Quadrant was calculated using a balanced set of measures, including:

- Gartner customer search, inquiry volume or pricing requests.

- Frequency of mentions as a competitor to other vendors in the Magic Quadrant for DevOps Platforms in reviews for similar use cases on Gartner's Peer Insights forum, as of 1 January 2025.
- Scores and frequency of mentions, as measured on Gartner Peer Insights.
- Significant innovations in the market, as noted by major publications, product enhancements or introductions, or industry awards.
- Other significant developments in corporate posture (e.g., mergers and acquisitions [M&A] activity).
- The volume of job listings specifies the DevOps platform on a range of employment websites in the Americas, Europe and Asia/Pacific.

Exclusion Criteria

We excluded vendors from the analysis if:

- The primary use case for the DevOps platform is the delivery of mobile applications, low-code applications, packaged business applications or SaaS-based applications (i.e., developing, extending, configuring or customizing applications such as Salesforce, Dynamics 365, Oracle, SAP, or ServiceNow). The market needs and expected platform capabilities for these use cases differ from the market definition of this Magic Quadrant.
- The platform is only sold as part of custom software development or professional services engagements (e.g., professional services providers using a custom solution for their clients).

Honorable Mentions

Amazon Web Services: While Amazon Web Services has discontinued some products and has moved away from its DevOps platform offering overall, the company continues to offer specific DevOps tools and has launched a number of agentic capabilities, such as Q CLI and CloudWatch operational investigations, that help developers troubleshoot issues.

Evaluation Criteria

Ability to Execute

Product or Service: We specifically looked for excellence in these areas:

- Product planning
- Software development
- Continuous integration
- Continuous delivery and release orchestration
- Configuration automation
- Monitoring, observability and operations support
- A managed version of open-source components in the platform
- An integrated platform for orchestration, collaboration and visualization
- Software delivery metrics
- Secure delivery
- AI augmentation and accessibility

Overall Viability: We specifically looked for excellence in these areas:

- Revenue growth
- Employee growth and retention
- Healthy financials, including funding status

Sales Execution/Pricing: We specifically looked for excellence in these areas:

- Customer growth and sales momentum
- Partner strength
- Customer wins and renewals

Market Responsiveness/Record: We specifically looked for excellence in the areas of business agility and customer responsiveness.

Marketing Execution: We specifically looked for excellence in these areas:

- Articulating value proposition to different audiences

- Thought leadership in marketing

Customer Experience: We specifically looked for excellence in these areas:

- Customer vote of confidence and customer satisfaction
- Commitment to improving customer experience

Operations: We specifically looked for excellence in these areas:

- Quality and effectiveness of programs to support the platform
- Quality and effectiveness of programs to engage customers

Ability to Execute Evaluation Criteria

Evaluation Criteria	*Weighting*
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	High
Market Responsiveness/Record	High
Marketing Execution	Low
Customer Experience	High
Operations	Low

Source: Gartner (September 2025)

Completeness of Vision

Market Understanding: We specifically looked for excellence in these areas:

- Strategic vision for the market
- Understanding of competitive landscape
- Active product roadmap and path forward

Marketing Strategy: We specifically looked for excellence in the area of linking market understanding to messaging.

Sales Strategy: We specifically looked for excellence in these areas:

- Adopting multiple sales motions
- Growing the business
- Licensing and pricing models

Offering (Product) Strategy: We specifically looked for excellence in these areas:

- Compelling product vision
- Competitive differentiation
- Moving from a DIY toolchain to a platform approach

Business Model: We specifically looked for excellence in these areas:

- Building a platform ecosystem
- OEM-centric/partner-centric business model

Vertical/Industry Strategy: We specifically looked for excellence in the area of specialization for industry verticals and domain expertise.

Innovation: We specifically looked for excellence in these areas:

- Innovation as a competitive advantage
- Organic innovation
- Inorganic innovation

Geographic Strategy: We specifically looked for excellence in these areas:

- Demonstrate platform capabilities to support multiple geographies

- Demonstrate sales strategy across geographies
- Demonstrate partner strategy across geographies

Completeness of Vision Evaluation Criteria

Evaluation Criteria	*Weighting*
Market Understanding	High
Marketing Strategy	Low
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Low
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium

Source: Gartner (September 2025)

Quadrant Descriptions

Leaders

Leaders have a deep understanding of the DevOps platform market and stand out in this highly competitive global market. They have a record of strong execution and can influence the market's direction with their thought leadership and resources. Leaders also have a clear vision and well-defined product roadmap.

The most distinctive attribute of Leaders in this market is their versatility across multiple dimensions. Their platforms deliver robust capabilities across the SDLC to support diverse use cases. Leaders can meet the needs of multiple personas across different teams, such as development, operations and site reliability engineering.

Most Leaders have a strong market penetration across geographies, verticals and organizations of all sizes, and possess a vibrant developer community and thriving partner ecosystem.

Leaders are well-positioned to remain dominant as the DevOps platform market evolves. In this rapidly changing market, however, vendors that lose focus could fall out of the Leaders quadrant.

Challengers

Challengers offer competitive DevOps platforms that deliver value for certain industries or use cases. These vendors have shown strong execution in their respective focus areas and are expanding their customer base.

Although Challengers demonstrate the financial strength and commitment to compete in the DevOps platform market, they have not demonstrated the vision required to expand their offering beyond their core customer base to serve different types of buyers and needs.

Visionaries

Visionaries focus on innovating their platform technologies and go-to-market strategies based on emerging technology and business trends. They offer a clear product roadmap that demonstrates a strong understanding of market demands.

Despite having a clear vision, Visionaries currently lack visibility outside of their existing customer base or domain. Further, they may lack the resources or expertise to build awareness of their offerings beyond their respective focus area.

Niche Players

Niche Players typically specialize in one segment of the DevOps platform market or have a relatively limited geographic footprint. They may be startups or small companies just starting to succeed, or vendors focused on a specific subset of use cases, such as container-

native or mobile applications. In some cases, Niche Players may not consider DevOps platforms as strategically significant in their broader portfolio of product offerings.

While Niche Players have not demonstrated the strongest Completeness of Vision or Ability to Execute relative to other vendors in this Magic Quadrant, qualifying for inclusion is quite an accomplishment in this highly competitive, global market.

Niche Players may be suitable for organizations that require local presence and support or need a platform that addresses specific industry use cases and functional requirements. These benefits can offset the viability risks that are often associated with smaller vendors.

Context

DevOps platforms provide software engineering teams with a consolidated set of integrated capabilities that span the entire SDLC. DevOps platforms provide numerous benefits when compared with traditional DevOps toolchains, including:

- **Improved software security.** DevOps platforms integrate and automate security, compliance and governance as part of the development and delivery process. A few DevOps platform providers natively support application security capabilities in their offerings (see **Market Guide for Software Supply Chain Security**).
- **Enhanced developer experience.** DevOps platforms minimize context switching across multiple tools by providing a cohesive, integrated set of capabilities (see **Focus on 3 Priorities to Improve Your Developer Experience and Productivity**).
- **Modernized application architectures.** DevOps platforms provide a strong foundation that enables software engineering teams to take advantage of cloud-native architectures (see **Strategic Roadmap for Adopting Modern Application Architectures and Technologies**).
- **Greater visibility into the flow of work.** DevOps platforms provide a clear view into software delivery pipelines — from ideation to production — especially when used in conjunction with value stream management platforms. This visibility reduces friction and manual handoffs.

Market Overview

A growing number of software engineering leaders are modernizing their DevOps toolchains by adopting DevOps platforms. Indeed, Gartner estimates that the broad opportunity spanning application development and IT operations software markets reached $25.6 billion in 2024. [1,2] The DevOps platform software market alone is expected to reach $6.4 billion by 2028, representing a 10.9% five-year CAGR in constant currency.

A DevOps platform can replace many specialized tools across the software delivery life cycle by offering a set of managed, integrated capabilities with built-in support for orchestration. By using DevOps platforms, software engineers will not need to dedicate as much time and effort to integrate, manage and orchestrate tools. As a result, software engineering leaders can improve the developer experience and enable their teams to deliver software faster.

Several trends are driving adoption of DevOps platforms, including:

- **A renewed focus on developer productivity:** The scarcity and expense of developer talent is driving software engineering leaders to maximize the productivity of their teams. Many are turning to generative AI tools offered by DevOps platform vendors. This, in turn, spurs interest in DevOps platforms. *Related research:* **Market Guide for Developer Productivity Insight Platforms**
- **The rise of platform engineering:** Platform engineering teams use DevOps platforms to build internal developer platforms and to orchestrate platform capabilities as a service to other software engineering teams, which enables product teams to focus on creating customer value. *Related research:* **Use Platform Engineering to Scale DevOps Adoption**
- **High customer demand for AI-enabled applications:** Software engineering teams need to use modern application architectures and technologies to deliver a diverse array of applications, especially new types of AI capabilities. DevOps platforms will become even more in demand as organizations adopt agile and DevOps practices to deliver AI-enabled applications. *Related research:* **Deliver AI-Enabled Applications Using Platform Engineering**
- **Increasing technical debt in DevOps toolchains:** A fragmented toolchain results in redundant tools, inefficient spending and a cumbersome experience for developers. Organizations are actively working to minimize this toolchain-related technical debt to improve the developer experience. *Related research:* **How to Start and Evolve Your DevOps Tooling Strategy**

DevOps platform vendors are responding to these trends by continuously innovating and expanding their platform capabilities, which has made the market more competitive and difficult to navigate. Software engineering leaders should use our analysis of DevOps platform vendors to make a buying decision or to make the business case for modernizing their current toolchain.

⊕ Evidence

⊕ Evaluation Criteria Definitions