

Scaled Agile Organisations in Denmark 2019

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Introduction

I wonder who might apply which scaled agile framework in Denmark? This is just about how the idea for this overview paper started in the first months of 2019. But answers were nowhere to find. Rather I was met with recognition of the question and eagerness to know the answer.

After a brief consideration of what kind of information, you can get *from* and *about* other organisations, the data collection started, and the completed overview is here.

I hope you find it worth reading.

And his paper would not have been possible without all the people delivering insights on their organisation, hints on other relevant organisations to include and specific comments on the paper. Thank you all!

Scaled agile frameworks

There are basically three ways to scale an agile organisation; apply a well-defined scaling framework, define your own structure, -or, form a hybrid of the two.

The well-defined frameworks for scaling agile are SAFe, Nexus, Scrum@Scale and LeSS.

[Scrum@Scale](#) and [Nexus](#) are both further developments of [Scrum](#), and are formed around repeating the structures of Scrum at multiple levels of the organisation. In other words, they are both based on the condition that the structure that works for teams, can work for teams of teams and all the way up to the portfolio level.

[SAFe](#) starts with the organisation's portfolio level and Lean. The objective is to have a lean enterprise with a clear description of roles and responsibilities. SAFe is not directly linked to neither Scrum nor Kanban, as teams are free chose their structure although within boundaries.

The starting point for [LeSS](#) is to reduce the organisational complexity (descale), prior to scaling the organisation. Thereby the amount of complexity, internal constraints and dependencies has been reduced, whereby the scaled setup also becomes less complex.

Further, a number of organisations has been inspired by the structure formerly applied at Spotify. That has not been described to the same extent as the above mentioned frameworks, but may be found e.g. on YouTube [here](#) and [here](#).

The hybrids often combine one structure for the team level with one or more structures for the portfolio level.

Data collection method

Data has been collected in the first half of 2019 via LinkedIn, mail, Statistics Denmark (The National Bureau of Statistics), public presentations, www and other public sources.

The same questions have been asked to all organisations and these are:

1. Name of organisation
2. Which variant of scaling framework (or combo) is used
3. Size of the scaling, that is number of people, teams, trains, tribes/ guilds that currently work in the scaled agile setup

All answers have been collected and data merged with data from other sources.

We reached out to more than 100 organisations which in itself, has given a fine overview of the diversity of the agile environments in Denmark. A number of the contacted organisations have actively chosen not to scale agile/ not to use an agile scaling framework, which is quite consistent with *Individuals and interactions over processes and tools* from the [agile manifesto](#).

Number of scaled agile organisations in Denmark

We have identified 40 Danish organisations where scaled agile frameworks are used. The majority of the organisations are within the IT, financial and insurance domains, that all early focused on application of agile methods. Further, we see that many business domains are represented and scaled agile methods are not only to be applied in special sectors. The numbers can be seen in Table 1 below.

Domain	Organisations (number)
Financial	10
Insurance	6
IT	6
Healthcare	5
Public	3

Production	4
Energy	2
Transportation	2
Media	1
Tele	1
Total	40

Table 1: Number of scaled agile organisations in Denmark by domains

The geographical distribution of scaled agile organisations in Denmark

When stating the geographical distribution of scaled agile organisations in Denmark, each organisation is counted by the headquarters address. No other locations in Denmark has been counted for the distribution.

Organisations who chose to scale agile, are to a very high degree located in the bigger cities in Denmark, where Copenhagen in particular, is represented by 19 organisations and an additional 5 in Ballerup. See Figure 1 below.

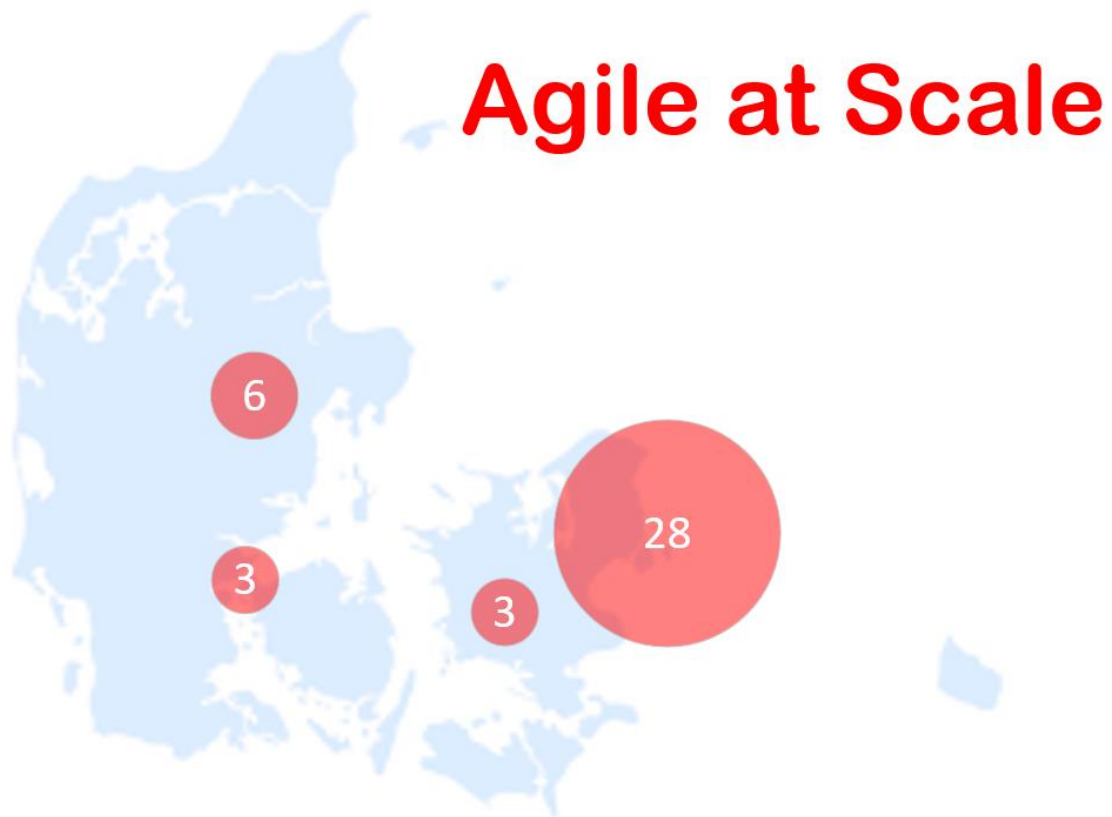


Figure 1: Geographical distribution of scaled agile organisations in Denmark

The distribution across regions can be seen in Table 2 below. In addition, the number of organisations with 50-249 and 250+ employees have been added¹, so that the relative number of scaled agile organisations in each region may be compared. Not surprisingly, there are most medium

¹ Number of organisations are for 2016, the most recent year available from Statistics Denmark. Numbers are not expected to have changed significantly since then.

sized (50-249 employees) and large (250+ employees) organisations in the Capital region by 38% and 53% respectively. However, Central Jutland and Southern Denmark regions each total up to 22% respectively 21% of the medium sized organisations and each 17% of the larger organisations.

The Capital Regions has 53% percent of the larger organisations but accounts for 70% of the scaled agile organisations in Denmark. The counterparts the Southern Denmark Region and Northern Jutland Region, account for 17% and 6% of the large organisations but has a relative smaller portion of the scaled agile organisations with 9% and 0%.

The Central Jutland Region and Southern Denmark Region have approximately the same portion of companies across size. However, the Central Jutland Region has about the double number of scaled agile organisations, compared to Southern Denmark Region. The Zealand Region represents the average in terms of fraction of organisations scaling agile.

Organisations (number)	50-249 employees	250 employees or more	Organisations with more than 50 employees	Scaling agile	Fraction in % (50+ employees)	Fraction in % (250+ employees)
Denmark total	3512	818	4330	40	0.9%	4.9%
Capital Region	1324	432	1756	28	1.6%	6.5%
Zealand Region	320	60	380	3	0.8%	5.0%
Southern Denmark Region	730	136	866	3	0.3%	2.2%
Central Jutland Region	785	142	927	6	0.6%	4.2%
Northern Jutland Region	353	48	401	0	0.0%	0.0%

Table 2: Number of scaled agile organisations in Denmark distributed on regions

Number of persons working in a scaled agile setup in Denmark

As more and more organisations chose to work agile or scaled agile, more and more people get involved in agile ways of working; either directly as part of an agile development team or as ScrumMaster, Product Owner or in any other role supporting the agile structure.

More agile certifications in frameworks as well as in specific roles emerge via the established frameworks, and this has further caused that the number of Danes able to certify others is rising as well.

The number of persons that are part of an agile setup is accounted for via direct reporting (number of persons), in combination with number of scaled groups (e.g. agile release trains) 'guestimated' to be 80 persons on average.

The total is at least 8,900 people in Denmark working in a scaled agile setup today. In addition, a substantial number of people work in agile (not scaled) teams, plus persons who currently do not

but previously did work in a scaled agile setup. Hence, recruiting experienced scaled agile employees is possible, although recruiting 10+ years *scaled* agile experienced people is quite difficult.

Scaled agile frameworks applied in Denmark

In Denmark all established frameworks for scaling agile are applied, either in the original version or in hybrids with other frameworks.

The most frequently used framework is SAFe by 63% (25 of 40), while 28% (11) use a hybrid of more than one framework and/or other elements (e.g. Lean Portfolio Management). Further, 5% apply a Spotify-like setup, while 3% apply DSDM or LeSS. 5 of 8 hybrids include some elements from SAFe, but also Nexus, Scrum@Scale, LeSS and Spotify-elements are included.

Figure 2 below, the show to which extent each scaled agile organisation use each scaling variant. As an example, 10% of the scaled organisations have included Spotify in their setup. Note, that the total number of scaling frameworks applied is 44 as some hybrids make use of more than one framework.

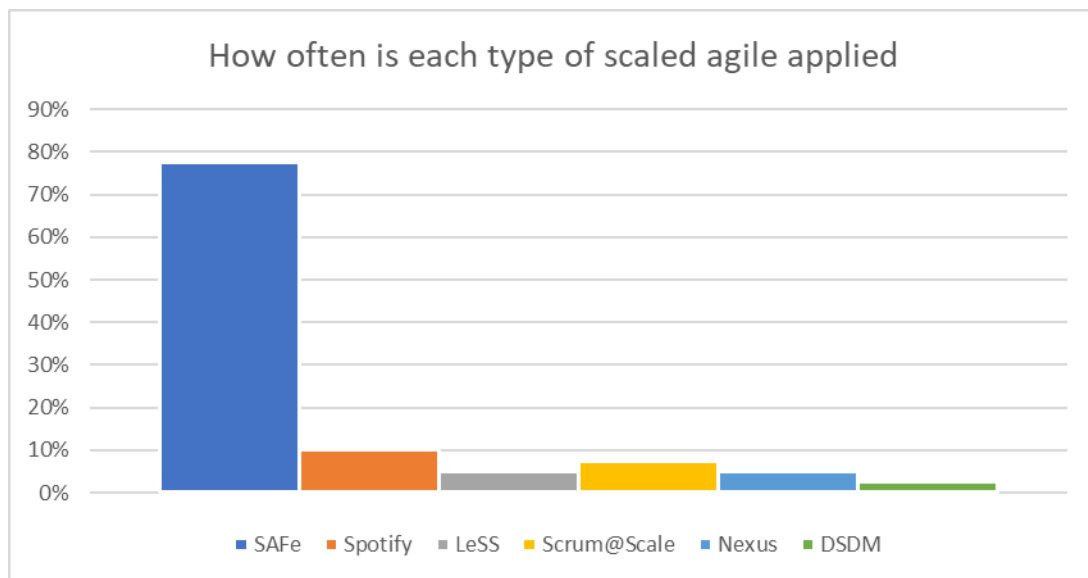


Figure 2 Distribution across types of scaled agile frameworks applied – across ‘pure’ implementations and hybrids

Further observations

During our observations across the Danish scaled agile landscape, some further observations stand out.

The smallest SAFe implementation (ART) is only 50 persons, which is found at FDC. Similarly, the largest area (ART) is of 150 persons and is found at SEGES.

In Denmark there is one organisation who is CMMI level 5 and scaling agile (SAFe), which is Systematic. In other words, a high level CMMI is not a hindrance for agile nor scaling agile.

The scaled agile setup combining most framework has been found at Saxo Bank, in a Minimum Viable Bureaucracy setup. It is spanning SAFe, Scrum@Scale, Nexus and Lean Portfolio Management.

Lego has travelled across most agile frameworks as first Stage Gate Agile, then SAFe and latest Scrum@Scale has been applied.

Finally, further three organisations are in process of implementing scaled agile, as both HBK, Landbrugstyrelsen and Energinet are expected to go live with SAFe in the fall 2019. Thereby the total number of confirmed Danish scaled agile organisations has reached 40!

Scaled agile organisations in Denmark

Organisations are listed alphabetically in each category.

Hybrids

- ALKA
- Bankdata
- Danske Bank
- Lego Systems A/S
- Maersk
- Nordea
- Planday
- Saxo Bank
- Siteimprove
- Widex
- WorldTicket A/S

SAFe

- Arla
- ATP
- Bang & Olufsen A/S
- BEC
- Demant (William Demant)
- DSB
- FDC
- GN Hearing
- Grundfos A/S
- NOVO Nordisk A/S
- Nykredit
- Oticon A/S
- PFA
- SEGES P/S
- SimCorp A/S
- Sitecore
- Skandia
- Skat
- Systematic A/S
- Topdanmark Forsikring A/S
- Tryg
- TV 2 Danmark

- Udviklings- og Forenklingsstyrelsen
- Velliv (Nordea Liv & pension)
- Vestas Wind System A/S
- Ørsted

DSDM

- Københavns Kommune - Koncern IT

LeSS

- Scalepoint

'Spotify'

- Alm. Brand
- Nuuday (was part of TDC A/S)

What about the future

Can we, solely based on this, reason about the natural level for scaled agile organisations in Denmark? The brief answer is no, as the data is only a tiny corner of the information going into the Danish board rooms.

However, what we can say, is that the potential is bigger than what we currently see realised, as the extent of scaling agile varies across regions. So, if organisations in all regions scaled agile to the same extent as the region with the highest share, Denmark would have approx. 280 scaled agile organisations and they would employ more than 60,000 in a scaled agile setup.

Conclusion

I wonder who might apply which scaled agile framework in Denmark? seems to be answered, as far as we only look at 2019. That the number of scaled agile organisations in Denmark has reached 40 is positive, but not surprisingly. It is positive that all established agile scaling frameworks are applied in Denmark, so that a 'Danish example' exist for each of them. Further, that the Danish organisations look beyond the established frameworks and thereby do put *Individuals and interactions over processes and tools* (agilemanifesto.org).

The list is expected to grow further, just as organisations currently scaling agile is expected to pursue other/ more scaling frameworks in the future.

For an organisation who consider scaling agile, this paper may serve as a road map to where they might be able to harvest some experiences. Both in terms of a business domain, a geographical perspective as well as to which agile scaling frameworks to consider.

Good luck with your agile journey!

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