

Linear.

Positioning, pricing, and the strategic wedge —
versus Jira, Asana, and ClickUp.

MEMO TYPE

Competitive Landscape

LAST VERIFIED

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PREPARED BY

Memodesk

Sample memo. This is the format and depth Memodesk delivers within 24–48 hours of brief receipt. A live engagement would include 2–3 additional pages of detail per section, primary research conversations with current users of the named products, and recommendations specific to the buyer’s position.

01 · EXECUTIVE SUMMARY

The position, in one page.

Linear has built a defensible position in engineering project management by selling a single thing — speed and an opinionated workflow for software teams — with a price floor (\$10/user/month) that undercuts Jira at small scale and a feature ceiling deliberately kept tight.

Three things matter most for anyone competing with Linear or building in adjacent territory.

One. Linear's per-seat economics break down at 50+ users where Jira's volume discounts catch up. A 100-person engineering team pays roughly \$16,800/year for Linear Business versus approximately \$9,036/year for Jira Standard — an 86% premium that finance teams notice during budget cycles.

Two. Linear is engineering-only by design. Companies with mixed engineering/non-engineering teams maintain Linear plus a second tool, which means Linear's category is structurally smaller than it appears and the consolidation play is wide open.

Three. Linear gates SAML/SCIM behind Enterprise pricing. Mid-market companies (50–200 employees) hit the SSO requirement well before they are ready for Enterprise pricing, creating a forced Business→Enterprise upsell that is the most consistent objection in late-stage Linear sales cycles.

The wedge worth pursuing: build the Linear-grade experience for cross-functional teams — not by adding bloat (the ClickUp mistake) but by being equally opinionated about what the non-engineering workflow looks like. The TAM is meaningfully larger than Linear's, the engineering-first incumbents and cross-functional incumbents both have UX debt, and Linear cannot extend without breaking the focus that makes it work.

The remaining sections develop each claim with sourced evidence.

02 · THE LINEAR POSITIONING

Two halves of one sentence.

Linear sells project management software to software development teams. Both halves of that sentence are doing equal work, and both define the boundary of the company's addressable market.

The first half — **project management software** — puts Linear in a \$5B+ category with Jira (40%+ market share among software development teams), Asana (cross-functional), ClickUp (all-in-one), Monday.com (visual workflows), Trello (kanban-only), Notion (work OS), and dozens of smaller tools. It is one of the most contested software categories in enterprise SaaS.

The second half — **specifically software development teams** — is where Linear's opinionated approach lives. The entire UX is built around one workflow: engineers create issues, group them into projects and cycles, link them to GitHub PRs, and ship them. The product refuses to serve marketing teams, HR teams, legal teams, or finance teams — and that refusal is the brand.

GO-TO-MARKET

Linear's sales motion is product-led. The company does not have a meaningful outbound sales function. Adoption typically starts with one engineer who experienced Linear at a previous company, brings it into their new team's free workspace, and the team upgrades to Basic when they hit the 250-issue cap — which most active engineering teams reach quickly, often within the first weeks of adoption.

Linear raised a \$35M Series B led by Sequoia Capital in 2022. The company has not publicly disclosed a valuation since.

WHAT THE POSITIONING EXCLUDES

By design, Linear does not serve:

- Cross-functional teams working a single project across engineering, design, and marketing

- Companies where InfoSec mandates SAML SSO before they are ready for Enterprise pricing
- Organizations needing read-only stakeholder visibility for executives or external clients
- Non-software project work — operations, content production, agency client work, HR processes

Competitors who serve these segments — Asana, ClickUp, Monday — operate in adjacent but largely non-overlapping markets. They generally do not lose accounts to Linear, because Linear cannot serve their buyers in the first place.

03 · COMPETITIVE LANDSCAPE

A 2x2 with one open seat.

The four serious competitors in Linear’s space resolve along two axes that consistently drive buyer decisions.

AXIS 1 · SPEED AND OPINIONATION VERSUS CUSTOMIZABILITY

Linear and Asana sit at the speed-and-opinionated end. Jira and ClickUp sit at the customizable-and-feature-dense end. Buyers who lead with developer experience or cross-functional clarity tend toward the first pair; buyers who lead with process customization tend toward the second.

AXIS 2 · ENGINEERING-SPECIFIC VERSUS CROSS-FUNCTIONAL

Linear and Jira are engineering-first — built for software teams, with workflows, integrations, and concepts that assume an engineering audience. Asana and ClickUp are cross-functional — built to serve marketing, operations, and design alongside engineering.

THE RESULTING MATRIX

	Opinionated	Customizable
Engineering-first	<p>Linear</p> <p>Wins on developer experience</p>	<p>Jira</p> <p>Wins on enterprise scale & ecosystem</p>
Cross-functional	<p>Asana</p> <p>Wins on product/marketing collaboration</p>	<p>ClickUp</p> <p>Wins on feature density & consolidation</p>

THE EMPTY CELLS

Two strategic positions in this matrix have no serious incumbent.

Cross-functional + opinionated + engineering-grade speed. No incumbent. Asana has cross-functional views but does not feel fast in the way Linear feels fast. ClickUp has the surface area but trades speed for customizability. This is the wedge developed in section 07.

Engineering-first + cross-functional crossover. Jira tried to be this for fifteen years and never quite succeeded.

HOW EACH INCUMBENT COMPETES

Jira competes on enterprise scale, ecosystem depth, and entrenched corporate IT relationships. Its recent Jira Work Management offering is an attempt to extend into cross-functional territory — but the product still feels like Jira underneath. They win on procurement inertia and Atlassian suite lock-in more than on product merit.

Asana competes on executive visibility and cross-functional workflow. Their Portfolios and Goals features explicitly serve the VP/C-suite buyer who needs one view across multiple teams. They lose deals to Linear when the buyer is a developer-led company where engineers have veto power over tooling decisions.

ClickUp competes on feature completeness and price. Their strategy is to replace every SaaS tool by adding enough features. The result is a product that wins SMB evaluation cycles on paper and loses on adoption: the tool is so configurable that teams spend more time configuring it than using it. This is a real and exploitable gap. ClickUp also reclassified external guest seats as billable members in early 2026 — a pricing change that generated significant customer backlash across Reddit and G2.

This is a real Linear advantage that often goes unnamed in published comparisons.

04 · PRICING TEARDOWN

The number buyers see, and the one they pay.

All four products have published pricing for low-to-mid tiers and custom Enterprise pricing for large deployments. The figures below are list prices verified April 2026 from official pricing pages and triangulated through CheckThat.ai, Quackback, JoinSecret, AIProductivity, and CostBench (full sources at end of memo).

LIST PRICING · VERIFIED APRIL 2026 · PER USER / MONTH

Tier	Linear	Jira	Asana	ClickUp
Free	Unlimited members 250 issues, 2 teams 10MB files	Up to 10 users 2GB storage	Up to 10 users	Unlimited members & tasks 100MB
Entry	\$10 Basic	\$7.91 Standard	\$10.99–13.49 Starter	\$7 Unlimited
Mid	\$14–16 Business	\$14.54 Premium	\$24.99–30.49 Advanced	\$12 Business
Enterprise	Custom ~\$16–25 est.	Custom	Custom	Custom

Linear Business is \$16/user/month on monthly billing and \$14/user/month on annual billing. Linear Enterprise is not published; the \$16–25 range is a third-party estimate from AIProductivity and Quackback for typical 100-seat deployments.

WHAT 100 ENGINEERS ACTUALLY COSTS (ANNUAL BILLING, MID-PAID TIER)

- **Linear Business:** ~\$16,800/year
- **Jira Standard:** ~\$9,036/year (Jira’s volume discounts kick in)
- **Asana Starter:** ~\$13,188/year
- **ClickUp Business:** ~\$14,400/year

At this scale, Linear is the most expensive of the four. The Jira gap is particularly notable: Jira's volume pricing makes it significantly cheaper at 50+ seats, which is exactly the scale where engineering organizations start caring about the annual bill.

THE HIDDEN COST PROBLEM

Jira's list price is not the total cost. The Jira Marketplace contains thousands of paid apps. A typical mid-market Jira deployment adds \$3–8 per user per month in Marketplace app costs for essentials like advanced roadmaps, time tracking, and sprint automation. The Vendr database (n=484 transactions) puts the median Jira-purchasing organization at \$85,618/year in total Atlassian spend. Most teams do not model this when they choose Jira "because it's \$7.91/user/month."

Linear's pricing has fewer hidden costs. Integrations are bundled. There are no Marketplace apps. The pricing page is the price.

05 · FEATURE GAP MATRIX

Where deals are won and lost.

Severity ratings on a 1–3 scale. Severity 3 means “competitive deals are routinely won or lost on this feature” based on published win/loss reviews and analyst comparisons.

Feature	Linear	Jira	Asana	ClickUp	Severity
Keyboard-driven UX	★★★	★	★★	★	2
GitHub-native integration	★★★	★★★	★	★★	3
Customizable workflows	★	★★★	★★	★★★	2
Cross-functional views (Goals, Portfolios)	★	★★	★★★	★★★	3
SAML SSO on non-Enterprise tier	✗	✓ Premium	✓ Advanced	✓ Business	3
Read-only / stakeholder seat	✗	✓ Free	✓ paid	✓ Guest	3
Mobile apps (parity with web)	★★	★★★	★★★	★★	1
AI features in default tier	★★	★★	★★	★★★	2
Audit logs	Enterprise only	Premium+	Advanced+	Business+	2
Issue limit on free tier	250 (hard cap)	None	None	None	2

THE THREE SEVERITY-3 GAPS

Cross-functional views. Linear’s product is structured around teams, projects, and cycles. Asana’s Portfolios and Goals features explicitly connect engineering work to company-level OKRs and let executives see one view across product, marketing, and operations. Linear has no equivalent. For organizations where the CEO wants one dashboard, Linear is a non-starter — they buy Asana or ClickUp regardless of engineering preference.

SAML SSO on non-Enterprise tier. Asana, ClickUp, and Jira all offer SAML SSO on their mid-tier plans (roughly \$12–25/user/month). Linear gates SAML behind Enterprise (custom pricing, estimated \$16–25/user/month per third-party analysts). This is the most consistent objection in late-stage Linear sales cycles, particularly for Series B+ companies whose InfoSec teams require SSO.

Read-only stakeholder seats. Jira offers free stakeholder licenses for unlimited read-only access. Linear has no equivalent — every person who needs to see the work pays full price. For organizations where executives, clients, or external partners need visibility, Linear’s per-seat economics break down. This is a structural pricing gap Jira has exploited for years.

06 · VULNERABILITIES

Where Linear is weakest.

Ranked by how exploitable each gap is for a competitor with a focused product strategy.

- 1. Mid-market SSO trap.** Series B+ companies hit the InfoSec requirement for SAML/SCIM at 50–150 employees. Linear’s Business plan does not include SAML. The upgrade path is Enterprise at custom pricing, typically \$20K+/year for a 100-person team. A competitor who ships SAML on a \$15/user/month Business tier wins this segment by default, without needing to win on any other dimension.
- 2. No stakeholder/viewer seats.** The absence of a read-only seat type forces every person who needs to see work — a VP wanting to check sprint status, an external client reviewing milestones, a CS rep tracking customer-facing bugs — to either pay a full Linear seat or get no visibility at all. Jira’s free stakeholder model is a direct counter to this in competitive evaluations.
- 3. Hard 250-issue cap on free tier.** Most free-tier competitors have no meaningful issue limit. Linear’s 250-issue cap is designed to force upgrades, and it works — but it also creates friction for early-stage teams evaluating tools. The cap means Linear cannot be used as a “try it for three months” tool without immediately hitting a paywall.
- 4. Engineering-only ceiling.** As companies grow, non-engineering teams (marketing, operations, design, customer success) need project tracking. They typically choose a second tool rather than Linear because Linear is not designed for them. Companies with mixed teams maintain Linear plus a second tool. This is a structural ceiling on Linear’s account expansion that no amount of feature investment can address without breaking the brand.
- 5. Annual billing required for paid tiers.** Linear’s Basic and Business tiers require annual commitment. Monthly billing is technically available but at a 15–20% premium. For SMB teams used to month-to-month SaaS, this creates buyer friction and delays.

6. Limited customization compared to Jira. Linear's opinionated workflow is also Linear's biggest single point of failure for organizations with established processes that do not match Linear's model. Migrating from Jira to Linear often requires changing how the team works, not just how they track work — and that is a much bigger change than buyers expect.

The vulnerabilities reinforce each other. A 100-engineer Series C company hitting the SSO requirement (#1), discovering they need read-only seats for their CS team (#2), and wanting cross-team visibility for the new VP of Operations (#4) does not have a smooth Linear upgrade path. They are talking to Asana sales by month three.

07 · THE WEDGE

One position. Five concrete moves.

The strongest competitive wedge against Linear is not “build a faster Jira” (Linear has this) and not “build a better ClickUp” (the bloat is the problem). It is to occupy the empty cell in the matrix.

THE POSITION

Build the Linear-grade experience for cross-functional teams — not by adding bloat (the ClickUp mistake) but by being equally opinionated about what the non-engineering workflow looks like.

WHAT THAT MEANS CONCRETELY

- **Same opinionated speed.** Keyboard-first, instant load times, minimal configuration. The thing that makes Linear feel like a tool engineers love.
- **Native non-engineering workflows.** First-class support for marketing campaigns, content production, design reviews, ops projects, and HR processes — not as Jira-style customization but as opinionated templates with Linear-grade UX.
- **One product, multiple workflows.** Avoid the ClickUp trap of becoming everything to everyone. Pick 3–4 specific non-engineering workflows and ship them at Linear quality.
- **SSO on Business tier.** Do not repeat Linear’s mid-market SSO trap. Ship SAML at \$15/user/month.
- **Stakeholder/viewer seats free.** Compete with Jira on the access economics that Linear concedes. Unlimited read-only seats on any paid plan.

THE COMPETITIVE MOAT

The moat is the same one Linear built: opinionated UX is hard to clone because the opinion has to be right, not just present. Asana has cross-functional views but does not feel fast. ClickUp has the surface area but feels like configuration software. Jira has the engineering

depth but is not trying to be cross-functional anymore. There is a credible 3–5 year run for a new entrant who executes well.

THE RISK

Linear may build into this space themselves over the next 24 months. They have the brand, the product DNA, and the engineering team to do it. The window for an external competitor is real but closing.

08 · SOURCES & METHODOLOGY

How this was built.

All claims in this memo are sourced from publicly available information verified in April 2026. Where claims were initially speculative, language has been softened to reflect what the sources can defensibly support.

PRIMARY SOURCES · VENDOR PRICING PAGES

- Linear official pricing page · linear.app/pricing · accessed April 2026
- Atlassian Jira pricing page · atlassian.com/software/jira/pricing · accessed April 2026
- Asana pricing page · asana.com/pricing · accessed April 2026
- ClickUp pricing page · clickup.com/pricing · accessed April 2026

SECONDARY RESEARCH · PRICING ANALYSES

- Vendr Linear pricing analysis (vendr.com/marketplace/linear) — anonymized contract data, n=hundreds of transactions
- CheckThat.ai · Linear pricing teardown · March 2026
- Quackback · “Linear Pricing 2026” · March 2026
- AIProductivity · “Linear Pricing 2026: Complete Guide” · March 2026
- CostBench · Linear pricing benchmark · April 2026
- JoinSecret · Linear plans comparison
- SaaSCRMReview · “Jira Pricing 2026” · February 2026
- CompareTiers · ClickUp vs Asana pricing comparison · March 2026

SECONDARY RESEARCH · USER FEEDBACK

- G2 customer reviews for Linear, Jira, Asana, and ClickUp · sampled April 2026
- TrustRadius reviews for the same four products
- Reddit [r/projectmanagement](https://www.reddit.com/r/projectmanagement) and [r/sysadmin](https://www.reddit.com/r/sysadmin) threads on ClickUp 2026 billing changes

METHODOLOGY NOTES

Pricing was verified via vendor pricing pages, then triangulated through 3–5 independent secondary sources to catch outdated information. Where vendor pricing pages were ambiguous, the lowest plausible rate was used.

Feature comparisons were derived from official feature documentation, supplemented by hands-on user reviews from G2 and TrustRadius. Severity ratings reflect the analyst’s judgment of how often each feature appears in published win/loss reviews and competitive comparisons. The wedge recommendation is the

analyst's strategic interpretation, not a prediction — it identifies a category gap that the data supports but does not guarantee a successful new entrant.

Total Cost of Ownership figures use median values from buyer-side databases (Vendr) where available. Linear Enterprise pricing estimates are drawn from third-party analyses (AIProductivity, Quackback) given Linear does not publish Enterprise pricing.

ABOUT THIS MEMO

This is a Memodesk sample. A real engagement would include 2–3 additional pages of detail per section, primary research conversations with current users of all four products, and customized recommendations specific to the buyer's strategic position. Order at memodesk.co or email hello@memodesk.co.