

The Forrester Wave™: Hybrid Cloud Management, Q4 2020

The Nine Providers That Matter Most And How They Stack Up

by Tracy Woo

November 30, 2020

Why Read This Report

In our 34-criterion evaluation of hybrid cloud management providers, we identified the nine most significant ones — BMC Software, Canonical, Flexera, IBM, Micro Focus, Morpheus Data, Nutanix, ServiceNow, and VMware — and researched, analyzed, and scored them. This report shows how each provider measures up and helps infrastructure and operations (I&O) professionals select the right one for their needs.

Key Takeaways

VMware And Micro Focus Lead The Pack

Forrester's research uncovered a market in which VMware and Micro Focus are Leaders; Morpheus Data, Flexera, BMC Software, and Nutanix are Strong Performers; IBM and ServiceNow are Contenders; and Canonical is a Challenger.

Depth Of Support, Choice, And Advanced Automation Are Differentiators

As public cloud platforms build out hybrid cloud capabilities, third-party solutions add value by providing deep support across both public and private cloud environments, multiple options to complete the same task, and next-generation capabilities in automated operations. Vendors that can offer these advantages position themselves for success in this market.

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Related Research Documents

- [Best Practices: Cloud Governance](#)
- [The Forrester Wave™: Cloud Cost Management And Optimization, Q4 2020](#)
- [Now Tech: Hybrid Cloud Management, Q4 2020](#)



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Support Depth, Choice, And Automation Are Key To Cloud Management

The market for (and maturity of) hybrid cloud management platforms has taken a long time to develop. The first versions launched in 2011, with every vendor jumping into the market seeking to be the “single pane of glass” for all things cloud and mainly focusing on infrastructure management. But the early-day buzz from vendors didn’t match user demand, and the scale of hybrid cloud deployments didn’t justify the costs of a management platform. Fast-forward to 2020: Rising momentum and the increasing scale of hybrid cloud and multicloud environments have made the choice of investment no longer optional but necessary — hybrid cloud platforms differ from multicloud in that they include both cloud management and cloud building for private and public cloud platforms.

In recent years, consolidation and innovation in the market have driven solutions formation of both net-new and newly rebuilt solutions, and these new solutions have moved management needs up the stack from infrastructure to development and platform layers. The rise of cloud-native is transforming the scope of hybrid cloud management from classic stack (e.g., virtual machine [VM] or monolithic apps) to classic plus cloud-native (e.g., container, serverless, or microservices). Edge computing plus cloud-native is now extending the boundaries of hybrid cloud management to be more distributed.

As a result of these trends, hybrid cloud management customers should look for providers that:

- › **Support their clouds with depth.** Ultimately, it doesn’t matter how many platforms a vendor supports — it only matters that it supports your platforms with depth. Every vendor in this evaluation supports Amazon Web Services (AWS), Microsoft Azure, and VMware vSphere-based clouds. Vendors differentiate with the breadth of cloud platforms they support (e.g., Alibaba, Google Cloud Platform [GCP], Hyper-V, OpenStack, or Oracle) and specific compute, storage, network, and database services across those clouds. However, the more important distinction, and one that’s far more difficult to unveil, is the depth of features across these platforms and services. At a minimum, solutions should offer lifecycle management and discovery across all supported platforms and services, with provisioning for core infrastructure services. Leaders differentiate with added performance visibility, cost visibility and optimization, and tag management across all supported platforms.
- › **Offer multiple options to solve a single problem.** Most solutions provide orchestration, provisioning, access security, and governance policy and tagging features. Leading solutions differentiate by offering multiple ways of achieving these same capabilities. Customers have made some decisions prior to selecting a hybrid cloud management platform. Flexibility can allow these solutions to fit around existing environments rather than forcing customers to reverse policies or rip and replace prior art. Examples include multiple discovery methods (e.g., agent-based and agentless option for discovery); accepted template formats; customizable permissions (e.g., multirole assignment or environment permissions); tag imports; customization around placement recommendations; and complete REST-based APIs that provide equivalent control, as in the UI.

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- › **Provide advanced optimization and automated operations.** Most solutions should provide optimization recommendation that identify waste (e.g., idle, unused, and unattached), make committed use recommendations (i.e., reserved instances [RIs]), and provide compute and storage rightsizing advice with automated remediation. Still, not every hybrid cloud offering is natively created. Some are developing; others use partners. Leaders differentiate by identifying expiring RIs and providing rightsizing for database instances. Leading solutions can trigger action based on a broad set of metrics, events, or log monitoring data. They can also filter through alerts to identify critical issues with automated operations capabilities.

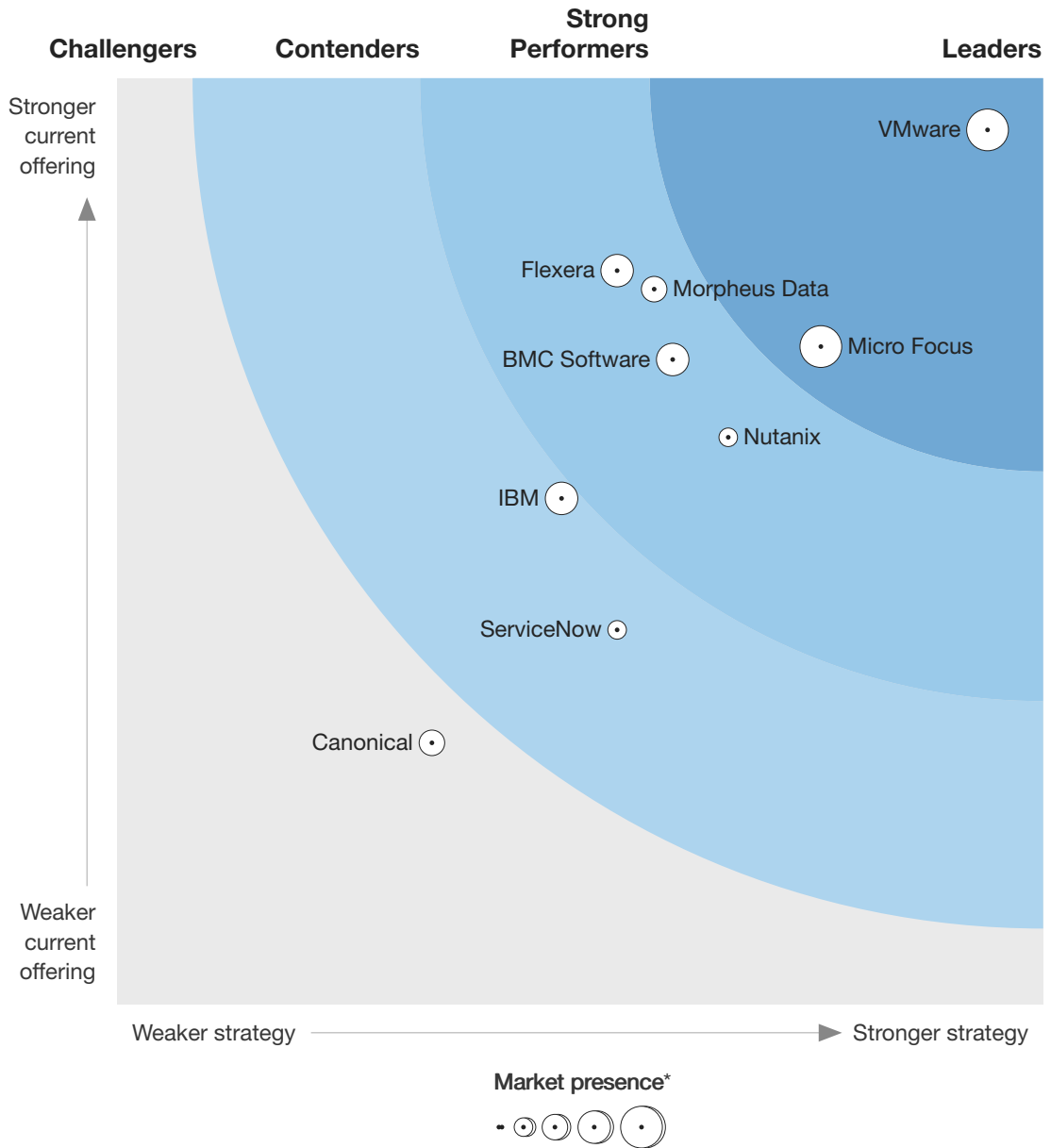
Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and doesn't represent the entire vendor landscape. You'll find more information about this market in our report "[Now Tech: Hybrid Cloud Management, Q4 2020.](#)"

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

FIGURE 1 Forrester Wave™: Hybrid Cloud Management, Q4 2020

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*A gray bubble indicates a nonparticipating vendor.

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FIGURE 2 Forrester Wave™: Hybrid Cloud Management Scorecard, Q4 2020

	Forrester's weighting	BMC Software	Canonical	Flexera	IBM	Micro Focus	Morpheus Data	Nutanix	ServiceNow	VMware
Current offering	50%	3.48	1.41	3.96	2.73	3.55	3.86	3.06	2.02	4.72
Discovery	10%	4.50	1.25	4.50	4.00	4.00	5.00	2.00	2.50	5.00
Governance and policies	20%	3.80	1.00	4.20	2.60	3.80	3.80	3.00	3.00	4.60
Visibility	10%	3.80	0.55	3.90	2.70	2.55	2.10	3.15	1.60	4.50
Orchestration and lifecycle management	20%	3.40	2.20	3.80	3.40	5.00	4.20	2.60	2.60	5.00
Optimization and automated operations	10%	4.30	0.50	4.70	2.00	0.50	1.95	3.70	0.65	5.00
Experience	30%	2.60	1.80	3.50	2.20	3.60	4.50	3.50	1.40	4.50
Strategy	50%	3.00	1.70	2.70	2.40	3.80	2.90	3.30	2.70	4.70
Product vision	15%	3.00	1.00	3.00	3.00	5.00	3.00	3.00	1.00	5.00
Execution roadmap	15%	3.00	1.00	1.00	1.00	3.00	3.00	3.00	1.00	5.00
Market approach	20%	3.00	1.00	3.00	3.00	5.00	1.00	3.00	3.00	5.00
Partner ecosystem	20%	3.00	3.00	3.00	3.00	5.00	3.00	3.00	3.00	5.00
Commercial model	15%	3.00	3.00	3.00	3.00	3.00	3.00	5.00	5.00	3.00
Performance	15%	3.00	1.00	3.00	1.00	1.00	5.00	3.00	3.00	5.00
Market presence	0%	4.00	2.25	3.25	3.25	4.25	2.25	2.00	1.75	4.75
Number of customers	25%	3.00	2.00	4.00	2.00	2.00	2.00	3.00	4.00	5.00
Product revenue	50%	4.00	3.00	3.00	4.00	5.00	2.00	2.00	1.00	5.00
Average deal size	25%	5.00	1.00	3.00	3.00	5.00	3.00	1.00	1.00	4.00

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

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Vendor Offerings

Forrester included nine vendors in this assessment: BMC Software, Canonical, Flexera, IBM, Micro Focus, Morpheus Data, Nutanix, ServiceNow, and VMware (see Figure 3). We invited Snow Software (formerly Embotics) to participate in this Forrester Wave, but it chose not to participate, and we could not make enough estimates about its capabilities to include it in the assessment as a nonparticipating vendor.

FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product evaluated
BMC Software	BMC Helix; BMC TrueSight
Canonical	Canonical Juju
Flexera	Flexera Optima; CMP; CloudScape
IBM	IBM Cloud Pak for Multicloud Management
Micro Focus	Micro Focus Hybrid Cloud Management
Morpheus Data	Morpheus
Nutanix	Nutanix Xi Beam; Nutanix Calm
ServiceNow	ServiceNow ITOM Operator Enterprise
VMware	VMware vRealize Suite and vRealize Network Insight (vR); CloudHealth by VMware (CH)

Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

- › **VMware offers a leading platform that extends management from private to public.** VMware combines vRealize Automation (vRA), vRealize Log Insight, vRealize Operations (vROps), and vRealize Suite Lifecycle Manager in its vRealize Suite 2019 solution. This evaluation covers the full suite, along with CloudHealth and vRealize Network Insight (vRNI). The company's focus is on providing app-aware multicloud management; its last major release focused on self-driving operations, programmable provisioning, and deepening support for public clouds. Also notable is

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the code and experience consistency between its classic on-premises and software-as-a-service (SaaS)-based offerings. The company boasts more than 41,000 vRealize customers and more than 10,000 customers for its CloudHealth platform.

Reference customers gave high marks for the solution's completeness of features and usability, cross-platform support, multicloud cost visibility, and support services. References also noted the absence of an upgrade path between major product updates (7.3 to 8.0 and 6.0 to 7.0) and wanted a better pricing model, along with lower prices; one customer pointed out a 20% cost increase between VMware and alternative platforms. VMware platform support includes AWS, Azure, GCP, VCPP partners, VMC, VMware Integrated OpenStack (VIO), VMware Tanzu Kubernetes Grid (TKG), VMware vSphere, and bare metal. VMware is a good fit for large enterprises with established data centers that are extending management to public cloud.

- › **Micro Focus brings a rich background in private cloud.** Micro Focus is functionally rich, providing a highly complex environment for enterprises in its product, Hybrid Cloud Management X (HCMX). The product is an amalgamation of Application Release Automation, Cloud Service Automation (CSA), Operations Orchestration (OO), and Universal CMDB/Universal Inventory Discovery. Many of these products were acquired from a Hewlett Packard Enterprise (HPE) divestiture. Most notably, product leadership has remained fairly consistent throughout this transition. With HCMX, Micro Focus narrows efforts on its unified self-service catalog, fully provisioned working environments, orchestration, and governance capabilities. The company claims a large install base of more than 40,000 customers globally.

Reference customers praised Micro Focus for its discovery and aggregation methods, service orchestration, administrator and user dashboards, and template and workflow designers. Customers also liked its support services, claiming good onsite support with its professional services team to train and onboard end users in migration and in developing workload and self-service components. On the other hand, customers would like to see stronger APIs, quicker implementation (one customer complained that platform migration took six months to a year), and better formal training provided at no additional cost. Micro Focus supports AWS, Azure, GCP, IBM Z, Nutanix, Micro Focus, OpenStack, Oracle Cloud (but only in discovery support), and VMware vSphere and is a good fit for large enterprises that require highly complex environment management.

Strong Performers

- › **Morpheus Data delivers speedy cloud management with strong customer reviews.** Morpheus Data was born out of personal use for private equity firm Bertram Capital. The group spun out of the firm in 2015; its company vision is to bridge the gap between cloud management and application lifecycle automation. Morpheus executes this by creating solutions for various personas: cloud, security, DevOps, and finance. It targets clients mostly in North America, followed closely by EMEA. Morpheus is one of the smaller vendors that we evaluated. It has more than 100 customers, and a majority of those are enterprise clients.

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Reference customers were very satisfied with Morpheus Data, commenting on quick implementation; they cited onboarding time of only “one or two weeks,” API-driven architecture, strong integration with VMware and other vendors, and discovery and governance capabilities as strengths. On the other hand, they wanted stronger Azure and Hyper-V integration, analytics and tracing capacities, and expansion of cost management. Morpheus supports AWS, Alibaba, Azure, Azure Stack, Cisco UCS, Digital Ocean, GCP, HPE OneView, Huawei Cloud, IBM Cloud (and Softlayer), Microsoft Hyper-V/SCVMM, Nutanix AHV HCI, OpenStack, Oracle Cloud, Oracle VM, T-System’s Open Telekom Cloud, UpCloud, VMware (EXSi, Fusion, vCenter, vCloud Director, and VIO), VMware Cloud on AWS, XenServer, and bare metal (via Canonical MaaS and PXE). Morpheus Data is a good fit for companies that need an application-aware hybrid cloud manager with an extensive list of supported cloud platforms.

- › **Flexera powers asset management in the cloud through acquisition.** Flexera is a long-time global player in the IT asset management (ITAM) and software asset management (SAM) markets. Flexera entered the hybrid cloud management space with its 2018 acquisition of RightScale (a long-time cloud management solution) and its 2019 acquisition of RISC Networks for dependency mapping, inventory, and migration recommendations. The company primarily focuses on public cloud management; however, many of its customers do use the platform to manage vSphere environments. In total, Flexera boasts more than 2,400 unique customers for cloud management.

Customers praised Flexera for its application visibility, asset management, support services, ease of implementation, and cost management capabilities. On the other hand, they wanted more flexibility as a cloud management platform and stronger integration point control. Customers would also like to see better support in its template libraries, specifically with security templates and workflow extensions. Flexera supports AWS, Azure, GCP, IBM Cloud, OpenStack, vSphere, and bare metal. It’s possible to support other platforms via plug-ins (e.g., Alibaba, IBM Cloud, or IBM Cloud Private). Flexera is a good fit for companies that are managing a hybrid environment that requires strong asset management and cost optimization capabilities.

- › **BMC Software pairs ESM with cloud management to serve complex environments.** BMC Software combines its well-known ITSM/enterprise service management (ESM) offering with built-for-purpose cloud management solutions to tackle complex cloud management issues. Its solution is a combination of eight products: BMC Helix (Capacity Optimization, Cloud Cost, Cloud Security, Discovery, and Digital Workplace) and BMC TrueSight (Cloud Lifecycle Management, Operations Management, and Server Automation). BMC’s solution is part of its larger plans to serve the autonomous digital enterprise. It emphasizes its digital assistant, capacity and cost optimization, predictive IT and AI for IT operations (AIOps), and governance and compliance capabilities. BMC has more than 1,000 cloud management customers.

Reference customers praised its ability to handle technically complex environments, object discovery capabilities, governance visibility, and customer support. On the other hand, they wanted a stronger on-premises experience, better documentation, faster onboarding, and more

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seamless integration. Customers would also like stronger monitoring, as they currently supplement with third-party solutions, along with stronger cost visibility (as the solution doesn't currently support amortization reports) and more intelligent provisioning. BMC supports AWS, Azure, Citrix XenServer, GCP, IBM Cloud, Microsoft Hyper-V, OpenStack, VMware vSphere/vCloud Director, and bare metal. BMC Software is a good fit for enterprises that focus on expanding service management from IT to broader use cases, especially for existing BMC Helix/Remedy customers.

- › **Nutanix is a new entrant, with good customer feedback and strong early numbers.** Nutanix is well known for its hyperconverged infrastructure (HCI) and started offering a cloud management solution following its 2016 acquisition of Calm.io and 2018 acquisition of Minjar, which it has renamed Nutanix Calm and Xi Beam. Beam is the first SaaS offering from Nutanix. Since then, the company has created solutions for different use cases in automation and orchestration, cloud financial management (FinOps), cost governance, and security compliance. It's actively building out its current capabilities with plans to implement automated governance actions, cost governance support for GCP, and a custom plug-in model for better integration. A SaaS version of Calm is in beta. Nutanix has more than 700 customers using Calm and Beam.

Reference customers praised Nutanix for its easy upgrade paths, consolidated pricing model, configuration management, and quick implementation. On the other hand, they'd like to see better logging of performance metrics, a UI that has more customization and is integrated into one main dashboard, deeper PowerShell support, and better visualization with anomaly detection. Nutanix Calm supports AWS, Azure, GCP, Nutanix Private Cloud, and VMware ESX. Beam supports AWS and Azure and expects to support GCP by the end of 2020. Nutanix is a good fit for companies that focus on using HCI software as building blocks for cloud adoption.

Contenders

- › **IBM is leveraging its cloud-native competencies for hybrid cloud management.** In 2018, IBM acquired Red Hat. IBM CloudPak for Multicloud Management (CP4MCM), a new product launched in 2019, is the culmination of the company's efforts and a focal point of its growth strategy. In CP4MCM, IBM combines application lifecycle management, application operations, cloud workload protection and compliance, container and VM management, automation via Terraform, and cost and asset management, along with intelligent day-two operations. In the coming months, the company plans to enhance existing AI capabilities in the solution with its Watson platform (i.e., AIOps, cost and asset management, governance, risk and compliance, and application operations). IBM CP4MCM has more than 200 enterprise customers.

Customers praise IBM for its service orchestration, which has a service composer using Terraform with sample templates to orchestrate services on the infrastructure layer. Customers also praise its application discovery and inclusion of Red Hat OpenShift. IBM supports AWS, Azure, Google Cloud, Huawei Cloud, IBM Cloud, IBM Cloud Private, Nutanix, OpenStack,

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and VMware vSphere. IBM is a good fit for companies that want native Terraform for service orchestration, for existing IBM customers, and for firms that want best-in-class container management in a hybrid cloud environment.¹

- › **ServiceNow ties cloud management to its ESM experience.** ServiceNow is recognized as one of the dominant players in the ESM market.² The company has been making big investments in automation, intelligence, DevOps, and, starting in 2017, hybrid cloud management. ServiceNow IT Operations Management (ITOM) includes Cloud Insights, Cloud Management, Discovery, Event Management, Operational Intelligence, and Service Mapping. It aspires to increase automation, decreasing human interaction and increasing integration with continuous integration/continuous delivery (CI/CD) pipeline tools via command line interface. The company is also working on deeper integration with Ansible and Terraform. Forrester estimates that ServiceNow ITOM has more than 2,300 customers.

Reference customers praised ServiceNow for its large ecosystem and the fact that it provides a faster go-to-market solution over a DIY path. On the other hand, customers would like to see a release plan that occurs faster than every six months to a year, stronger day-two capabilities such as provisioning and resource management, more prebuilt connectors, unified visibility across clouds, and an easier implementation path. ServiceNow supports AWS, Azure, GCP, IBM Cloud, IBM Cloud Private, and VMware's vCenter. ServiceNow is a good fit for current ServiceNow customers that want to stay in its ecosystem.

Challengers

- › **Canonical offers a cloud-agnostic solution that's building out deep container support.** Canonical is well known for Ubuntu Linux and its Canonical OpenStack distribution; for hybrid cloud management, it features its Juju solution. Juju targets model-driven cloud-native apps on public and private infrastructure. Canonical plans to build on its containers position by extending Kubernetes support, positioning its Charms product for Azure Stack support, supporting Amazon ECS and other containers-as-a-service (CaaS) platforms, and building out an Open Operator collection portal. The company delivers new updates on a six-month cadence. Canonical has more than 300 cloud management customers.

Reference customers praised Canonical for its open source position; its transparency, which enables better platform security; and its openness, in which end users can change the code, as well as the fact that it's entirely agnostic — the platform can mix and match with various OSes. Customers also liked its legacy container support in Ubuntu. On the other hand, they wanted support for more open source-based tools (e.g., Debian or SUSE). Customers also complained of the steep learning curve; some mentioned a several-years training path. This is, in part, due to a lack of user-friendly documentation. Customers would like to see more granularity in levels of role-based access control. Canonical supports AWS, Azure, GCP, IBM Cloud, OpenStack, Oracle

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Cloud, Rackspace, VMware vSphere, and bare metal (through MaaS). Canonical is a good fit for companies looking for a cloud-agnostic solution that supports a wide variety of open source-based products and focuses on containers.

Evaluation Overview

We evaluated vendors against 34 criteria, which we grouped into three high-level categories:

- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include discovery, governance and policies, visibility, orchestration and lifecycle management, optimization and automated operations, and experience.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated product vision, execution roadmap, market approach, partner ecosystem, commercial model, and performance.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's number of customers, product revenue, and average deal size.

Vendor Inclusion Criteria

Forrester included nine vendors in the assessment: BMC Software, Canonical, Flexera, IBM, Micro Focus, Morpheus Data, Nutanix, ServiceNow, and VMware. Each of these vendors has:

- › **Core capabilities in multicloud management across workloads.** Each solution must have these capabilities: application, infrastructure, and health information, orchestration, native provisioning, multicloud billing, cost visibility and predictive analysis, governance policy creation and enforcement, and security policy creation and enforcement.
- › **Revenue that meets or exceeds US\$10 million for FY 2019.** In addition, the solution must have at least 150 customers.
- › **Support for, at minimum, AWS, Azure, and vSphere-based clouds.** Each solution provided hybrid cloud management capabilities for AWS, Azure, and vSphere-based clouds by July 24, 2020. Support capabilities for others are helpful, but these three were the baseline.
- › **General availability of the solution.** The solution must have been generally available as of July 24, 2020.
- › **A solution available as a standalone tool.** The solution must be sold as a standalone tool, not requiring services or infrastructure subscription or purchase.
- › **Client interest.** The solution has sparked interest (in the form of mentions and inquiries) from Forrester's client base over the past 12 months.

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Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

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In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by July 24, 2020, and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

Endnotes

¹ See the Forrester report "[The Forrester Wave™: Multicloud Container Development Platforms, Q3 2020.](#)"

² See the Forrester report "[The Forrester Wave™: Enterprise Service Management, Q4 2019.](#)"

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