

The Forrester Wave™: Cloud Cost Management And Optimization, Q4 2020

The Eight Providers That Matter Most And How They Stack Up

by Tracy Woo

October 28, 2020

Why Read This Report

In our 27-criteria evaluation of cloud cost management and optimization (CCMO) providers, we identified, researched, analyzed, and scored the eight most significant players — Apptio, CloudCheckr, Densify, Flexera, Nutanix, Replex, Turbonomic, and VMware. This report shows how each provider measures up and helps infrastructure and operations (I&O) professionals select the right solution for their needs.

Key Takeaways

VMware, Apptio, And Flexera Lead The Pack

Forrester's research uncovered a market in which VMware, Apptio, and Flexera are Leaders; CloudCheckr, Turbonomic, and Densify are Strong Performers; Nutanix is a Contender; and Replex is a Challenger.

Container Support, Accurate Billing, And Cost Optimization Are Key Differentiators

As native public cloud platforms add lightweight waste identification and commitment-based savings recommendations, standalone solutions must deliver rich optimization and strong multicloud support. Vendors that provide container support, accurate billing, and superior cost optimization position themselves to successfully deliver value beyond that of native platform providers and provide maximum savings to their customers.

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Rich Optimization And Multicloud Support Are CCMO Must-Haves

Cloud powers innovation and adaptation. As companies extend their governance capabilities to public cloud resources, the first challenge to solve is cloud cost management and optimization. Over the past few years, startups took this market by storm with cost-affordable, standalone products that addressed billing, visibility, and optimization. Our previous evaluation, “[The Forrester Wave™: Cloud Cost Monitoring And Optimization, Q2 2018](#),” called out strong multicloud support and cost optimization capabilities as the main differentiators. This remains true — but with added nuance. Support has expanded to Google Cloud Platform (GCP) in addition to Amazon Web Services (AWS) and Microsoft Azure. Optimization recommendations have expanded past virtual machine (VM) recommendations to include containers and even storage and database services. However, feature parity between supported cloud platforms remains a work in progress for many.

As a result of these trends, CCMO customers should look for providers that:

- › **Cover the full breadth of the multicloud platform support they need.** Look for a solution that supports the cloud platforms you use. At a minimum, expect AWS and Azure support, with emerging GCP capabilities. Leaders will differentiate with full support of GCP (across billing, visibility, and optimization) as well as providing support for other popular platforms such as IBM Cloud, OpenStack, Oracle, or VMware vSphere. Leading solutions will also discover both metadata and cloud bills to provide accurate billing inclusive of discounts, reserved instances (RIs), AWS Savings Plans usage, native tags, performance insights, and even marketplace purchases.
- › **Calculate rich cost optimization recommendations beyond basic compute.** The native cloud platforms can identify waste, visualize your costs, and make reserved instance recommendations, but leading offerings in this market go beyond that with finely tuned optimization recommendations across all the major platforms. Leaders optimize not only common VM resources (e.g., AWS EC2, Azure VMs, or GCP GCE) but also container (AWS EKS, Azure AKS, or GCP GKE), storage, and database instances.¹ In addition, market leaders power their recommendations with data from major third-party monitoring solutions such as AppDynamics, Datadog, Dynatrace, and New Relic. They can also consider memory, disk, CPU, and network data when making their recommendations.
- › **Deliver forecasting and billing administration and democratization.** There’s more to cloud cost management than identifying waste and optimizing spend. Leading solutions in this space provide rich dashboards that visualize amortized costs and forecasted spend with the ability to customize by tags, departments, or users. Many of these tools are also designed to foster communication and collaboration among operations, development, and finance teams. Although these features are often undervalued in RFPs, enterprises using the tools rave about the time savings and positive business outcomes that stem from these capabilities.

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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 "[Top 10 Facts Every Tech Leader Should Know About Cloud Cost Optimization](#)."

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.

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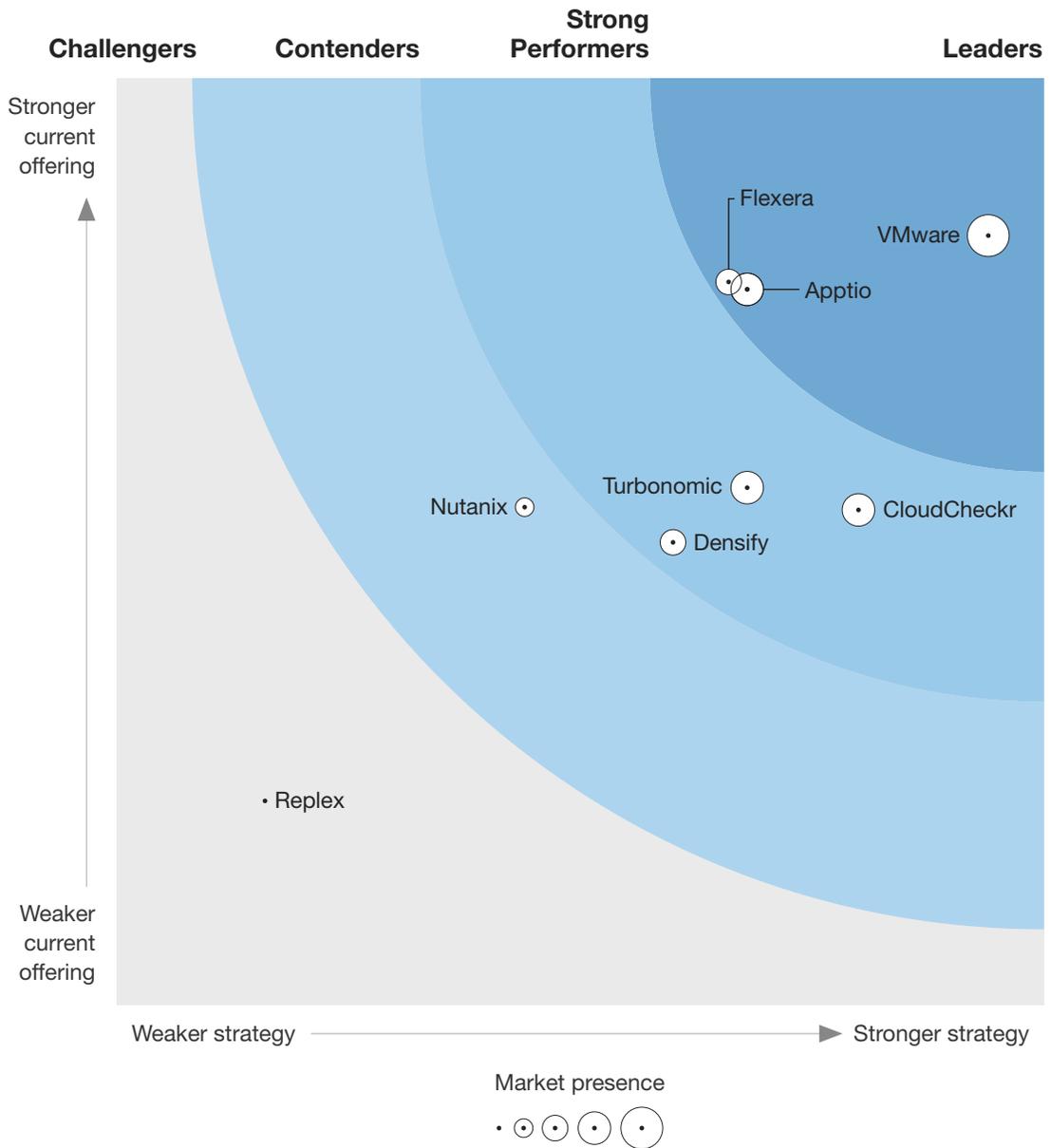
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FIGURE 1 Forrester Wave™: Cloud Cost Management And Optimization, Q4 2020

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FIGURE 2 Forrester Wave™: Cloud Cost Management And Optimization Scorecard, Q4 2020

	Forrester's weighting	Apptio	CloudCheckr	Densify	Flexera	Nutanix	Replex	Turbonomic	VMware
Current offering	50%	3.86	2.67	2.50	3.90	2.69	1.10	2.79	4.15
Access and permissions	5%	3.00	5.00	5.00	5.00	3.00	1.00	3.00	5.00
Resource discovery and cloud platform support	10%	4.00	3.00	3.00	5.00	3.00	2.00	3.00	5.00
Billing	15%	5.00	3.00	2.50	5.00	3.00	1.00	1.50	5.00
Cloud visibility	10%	4.50	4.50	3.00	3.00	2.50	2.50	1.00	5.00
Cost optimization	30%	3.20	1.40	1.90	4.00	2.20	0.50	3.05	4.00
Cloud forecasting	10%	4.50	1.00	3.00	1.00	0.75	1.00	3.00	1.50
Experience	20%	3.50	3.50	2.00	4.00	4.00	1.00	4.00	4.00
Strategy	50%	3.40	4.00	3.00	3.30	2.20	0.80	3.40	4.70
Product vision	15%	3.00	3.00	3.00	5.00	1.00	1.00	3.00	5.00
Market approach	15%	3.00	5.00	3.00	3.00	3.00	1.00	3.00	5.00
Partner ecosystem	20%	3.00	5.00	3.00	3.00	1.00	0.00	5.00	5.00
Commercial model	15%	3.00	3.00	1.00	5.00	5.00	1.00	1.00	5.00
Execution roadmap	15%	3.00	5.00	5.00	1.00	3.00	1.00	5.00	3.00
Performance	20%	5.00	3.00	3.00	3.00	1.00	1.00	3.00	5.00
Market presence	0%	4.00	4.00	2.15	2.95	2.00	1.00	3.85	5.00
Number of customers	50%	3.00	5.00	2.00	3.00	2.00	1.00	3.00	5.00
Product revenue	35%	5.00	3.00	2.00	2.00	2.00	1.00	5.00	5.00
Market share	15%	5.00	3.00	3.00	5.00	2.00	1.00	4.00	5.00

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

Vendor Offerings

Forrester included eight vendors in this assessment: Apptio, CloudCheckr, Densify, Flexera, Nutanix, Replex, Turbonomic, and VMware (see Figure 3). We invited BMC Software, ServiceNow, and Yotascale to participate in this Forrester Wave, but they chose not to participate, and we couldn't make enough estimates about their capabilities to include them in the assessment as nonparticipating vendors.

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FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
Apptio	Apptio Cloudability	4.51
CloudCheckr	CloudCheckr	20
Densify	Densify	12.1.4
Flexera	Flexera Optima	N/A
Nutanix	Nutanix Xi Beam	N/A
Replex	Replex	1.5
Turbonomic	Turbonomic	7.22.4
VMware	CloudHealth (CH)	N/A

Vendor Profiles

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

Leaders

- › **VMware offers a leading platform for cloud-native and traditional enterprises.** VMware acquired CloudHealth Technologies in 2018 and has since made CloudHealth the lead on its public cloud management initiatives.² This serves as a counterbalance to its private cloud-centric offering vRealize Suite, which includes cost management and optimization capabilities; this evaluation, however, focuses solely on CloudHealth.³ VMware's success in the enterprise data center makes the CloudHealth offering attractive for existing VMware customers and partners. Since the acquisition, CloudHealth has expanded its channel and partnerships, its traditional enterprise customer logos, and its integrations to enterprise software, including vRealize Operations. CloudHealth has more than 10,000 unique customers, including some of the largest cloud consumers in the world.

Reference customers gave high marks for CloudHealth's customer support and openness to adding new features. They also appreciated the team's quarterly business review, which provides benchmark comparisons with other customers of similar size and cloud spend. On the other hand, they noted that the UI is clunky, multidimensional reports are difficult to create with current reporting and APIs, and the pace of innovation post-acquisition has notably slowed. Rightsizing recommendations are available for AWS (EBS and EC2), Azure (SQL and VMs), and GCP (GCE).

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CloudHealth also includes visibility support for VMware on AWS (VMC), Oracle (beta), and vSphere and other VMware Cloud Provider Program (VCP) clouds, in addition to AWS, Azure, and GCP. VMware fits the requirements for large cloud-native companies and traditional enterprise clients with existing VMware management products.

- › **Apptio brings advanced billing features with its financial management background.** Apptio is the predominant player in the IT financial management (aka technology business management) market. In 2017, it entered the public cloud CCMO space, where it has since bolstered its offerings by acquiring FittedCloud in 2018 and Cloudability in 2019. Apptio has substantially increased Cloudability's sales force and plans to double its engineering headcount. Apptio primarily builds traction via a land-and-expand approach by driving attachment rates to its core products. Additionally, it has bolstered its senior leadership with hires from Amazon, Google, and Microsoft to deepen partnerships and accelerate traction.

Reference customers praised Apptio for its ease of use and intuitive interface; both technical and nontechnical roles can pick up the tool easily. Its APIs allow for smooth scaling and integration. Customer complaints include limited support in complex permission handling (wanting more granular control) and nonintuitive role limitations. Rightsizing recommendations are available for a limited set of AWS (EBS, EC2, and RDS) and Azure (Managed Disks, SQL Database, and VMs) tools, and the solution doesn't provide recommendations for GCP services. Unique features include a unified billing data lake, data perpetuity for auditing, and on-premises-to-cloud and cloud-to-cloud migration recommendations. Apptio is a good fit for companies seeking a platform from a company with a strong financial management background to serve both technical users and financial stakeholders.

- › **Flexera acquired RightScale to deliver multicloud management solutions.** Flexera is a long-time global player in the IT asset management (ITAM) and software asset management (SAM) markets. Flexera entered the cloud cost optimization market with its 2018 acquisition of RightScale, including cost management solution Optima — RightScale was the first entrant in the cloud management space. Flexera sells Optima separately but also bundled within its larger cloud management solution. This evaluation scores Optima as a standalone solution only; we didn't consider its deeper inventory, brokerage, and policy creation in this evaluation. Flexera's primary targets are enterprises and cloud managed services providers (MSPs).

Customers praised Flexera for its breadth of platform support. It currently supports visibility into AWS, Azure, Google, IBM, OpenStack, and VMware and rightsizing recommendations for AWS (EC2, RDS, and S3), Azure (Blob storage, Managed Disks, SQL DB, and VMs), and GCP (Cloud Storage, Cloud SQL, and GCE). Customers also liked the UI, which provides a single view for multiple platforms, along with its ability to drill down to the lower resource levels. However, the delay in refresh can be painful, with a three-day delay for cost changes. Unique features include data perpetuity for auditing, AWS discount reallocation, and RI reports that indicate expiration

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dates (AWS and Azure only). Flexera completed only one customer reference call using the Optima product. Flexera is a good fit for companies that require visibility into cost across public and private clouds and for those requiring integration in a major hybrid cloud management platform.

Strong Performers

- › **CloudCheckr pairs cost optimization with compliance checks.** CloudCheckr was founded in 2011 and offers a unified cost and security management solution for public cloud environments. Its latest release includes CloudCheckr CMx, which it markets as an extensible, scalable platform built specifically for the enterprise. This product release also comes with vertical-specific configurations: CMx Federal and CMx High Security. CloudCheckr has a vast audience in the MSP space. Of its 4,500 customers, 60% are generated via its MSP, distributor, and partner networks. The company has heavy traction in federal government, finance, healthcare, manufacturing, media, and technology.

Reference customers praised CloudCheckr for its CMx release, noting that “it’s a game changer” in terms of upgrading its UI and experience. CloudCheckr is most noted for its regulatory framework build-outs. The company offers 35 different frameworks, including GDPR, HIPAA, and NIST.⁴ Compliance checks are limited to AWS. Customers liked the ease of its one-click compliance checks and the completeness of its APIs to enable automated workflows that integrate with other business apps. They’d like to see improvements in noncore AWS services. Rightsizing recommendations include AWS (EC2) and Azure (SQL and VMs). Visibility and billing support also extend to Microsoft Azure Stack, GCP (visibility only), and VMware vSphere. CloudCheckr is a good fit for companies looking for a blended cost optimization and regulatory compliance solution that visualizes and advises on cloud governance for technical and nontechnical users.

- › **Turbonomic combines cost management with application resource management.** VMTurbo rebranded in 2016 to Turbonomic to focus on application resource management, which includes cost optimization capabilities. It continues to build out this portfolio with two 2019 acquisitions — ParkMyCloud (cost scheduling) and SevOne (network performance and management). Turbonomic has significant partnerships with Cisco, IBM, and Microsoft, which positions it well to capture enterprise accounts.

Reference customers praised Turbonomic for its ParkMyCloud acquisition, saying that it takes the platform “to the next level.” Customers already using Turbonomic like its use of the same console for both on-premises and cloud, making implementation much easier. Although customers were generally positive about the UI, they noted that it’s limited to technical audiences and that recommendations are poorly worded, with little explanation behind them. Rightsizing recommendations include AWS (EBS, EC2, EKS, and RDS), Azure (AKS, SQL, and VMs), and GCP (GKE). Private cloud support includes Apache CloudStack, Microsoft Hyper-V, OpenStack, RedHat VM, and VMware vSphere. The vendor integrates with a long list of infrastructure and app monitoring tools and provides a range of optimization policy customization options. Turbonomic is a good fit for companies looking for broader application resource management, depth of private cloud support, and container support.

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- › **Densify has strong cost optimization capabilities, especially for AWS.** In 2017, Cirba rebranded as Densify, at the same time making the shift to becoming a software-as-a-service (SaaS)-delivered analytics product. To support this pivot, Densify has embodied Agile product management practices with consistent biweekly updates to its Densify Cloud Cost Intelligence solution. It has also integrated heavily with common ITSM, CDRA, and collaboration technologies to aid customers' agile practices.⁵ The company claims differentiation with its predictive analytics engine, which feeds its optimization recommendations.

Reference customers praise Densify for its excellent customer support and the speed with which it incorporates custom feature requests and new provider releases and features. For example, they noted fast support of AWS Savings Plans, with an entire collection of ad hoc reporting that synthesizes and simplifies Savings Plans purchases. Their biggest complaint was with Densify's UI, which has noticeable latency. Rightsizing recommendations include AWS (ASG, EC2, EKS, and RDS), Azure (AKS and VMs), and GCP (GCE and GKE). Its reserved instance recommendations are limited to AWS, and billing capabilities don't support GCP. Unique features include public cloud container service support, optimized workload placement, and lots of optimization policy customization options. Densify is a good fit for companies looking for deep AWS optimization capabilities, early container support, and more intimate customer care that will tailor the platform to customer needs.

Contenders

- › **Nutanix is a recent entrant with fast updates and positive customer feedback.** Nutanix, best known for its hyperconverged infrastructure (HCI), entered the cloud management space with its 2018 acquisition of Minjar Botmetric, which it has since renamed Nutanix Beam. Beam is the first SaaS offering from Nutanix. Since the acquisition, Beam has added a total-cost-of-ownership model to show the actual cost of VMs running in a data center. In the next 12 months, the company plans to build out automation resource cleanup policies, provide support for GCP, deliver cloud-to-cloud migration recommendations, and provide more integrations into the rest of its own product lines. Beam most notably supports AWS GovCloud.

Reference customers praised Nutanix for its customer support, with quick responses and fast bug-fix turnarounds. Customers also like its multicloud UI, making it easier to view hundreds of accounts on one pane, as well as its ability to download screen data and detailed information beyond that of a native cloud service provider (CSP). Customers would like to see GCP support and improved permissions setup (if without group credentials). Rightsizing recommendations cover AWS (EBS, EC2, and RDS) and Azure (Managed Disks, MySQL, SQL, and VMs). Nutanix is the only solution in the market to provide both pay-as-you-go and term-based licensing, with the ability to pay at the end of each month and to cancel at any time. Nutanix is a good fit for existing Nutanix customers that seek public cloud cost governance, US federal organizations that need GovCloud support, and customers looking to commit to a new but responsive player that will grow with them.

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Challengers

- › **Replex offers cost management for Kubernetes deployments.** Replex is a startup founded in 2016 and based in Germany. It began by building a traditional cost optimization solution but has since narrowed its focus to pure Kubernetes (K8s) cost management and governance. While the company is still building out its market presence, it has raised \$4.15 million in seed investment by several enterprise technology investment firms. Its customers leverage the service for Kubernetes resources only and generally have large footprints in various Kubernetes-based infrastructure. Customers include Panasonic, SONOS, and Vodafone. Most clients are in the US, with a smaller number located in Europe. Upcoming feature releases include a cross-functional collaboration tool targeted at engineers, a SaaS dashboard, support for IBM Cloud Kubernetes service and OracleCloud Container Engine for Kubernetes, and new webhooks and APIs.

Reference customers praised Replex for its excellent support service and polished reports that can drill down into almost every instance. However, the largest complaint was that idle costs identification is misleading, as Replex counts all idle resources as potential cost savings rather than leaving some as a buffer. Customers would also like to see better flexibility in its dashboard and ability to create tags. Currently the solution supports Kubernetes nodes found in AWS, Azure, GCP, Hyper-V, and vSphere. Replex is a good fit for companies focused on Kubernetes optimization, where other cost optimization solutions are currently lacking.

Evaluation Overview

We evaluated vendors against 27 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 access and permissions, resource discovery and cloud platform support, billing, cloud visibility, cost optimization, cost forecasting, and experience.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated product vision, market approach, partner ecosystem, commercial model, execution roadmap, 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 market share.

Vendor Inclusion Criteria

Forrester included eight vendors in the assessment: Apptio, CloudCheckr, Densify, Flexera, Nutanix, Replex, Turbonomic, and VMware. Each of these vendors has:

- › **Multicloud support.** Each vendor solution supports at least two public cloud platforms.

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- › **Cloud cost management and optimization capabilities.** Vendor solutions include cost monitoring, optimization, and recommendation capabilities.
- › **Market presence.** Each vendor has at least 30 enterprise customers or product revenue of at least \$4 million USD.
- › **Standalone tool.** The product is available for purchase as a standalone tool.
- › **Availability.** Solution capabilities were generally available as of July 20, 2020.

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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.

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.

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Endnotes

- ¹ Public cloud resources include the following. AWS: Auto Scaling group (ASG), Elastic Compute Cloud (EC2), Elastic Block Store (EBS), Elastic Kubernetes Service (EKS), Relational Database Service (RDS), and Simple Storage Service (S3). Azure: Azure Blob storage, Azure Database for MySQL, Azure Kubernetes Service (AKS), Azure Virtual Machines (VMs), Azure Managed Disks, and Azure SQL Database (SQL DB). Google: Google Cloud Storage (GCS), Google Cloud SQL, Google Compute Engine (GCE), and Google Kubernetes Engine (GKE).
- ² VMware refers to this aspect of its portfolio as its “multicloud management” products, which don’t assume the use of VMware vSphere.
- ³ VMware refers to this aspect of its portfolio as its “hybrid cloud management” products, which don’t assume the prior use of VMware vSphere in the design of the products. Cost Insights is VMware’s previous cost optimization tool; it provided optimization insights for vSphere, along with select public cloud resources.
- ⁴ GDPR is the EU General Data Protection Regulation. HIPAA is the Health Insurance Portability and Accountability Act. NIST is the National Institute of Standards and Technology.
- ⁵ ITSM is IT service management. CDRA is continuous delivery and release automation.

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