WAVE REPORT

The Forrester Wave™: Cloud Cost Management And Optimization Solutions, Q3 2024

The 12 Vendors That Matter Most And How They Stack Up

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FORRESTER®

Summary

In our 25-criterion evaluation of cloud cost management and optimization vendors, we identified the most significant ones and researched, analyzed, and scored them. This report shows how each provider measures up and helps cloud professionals select the right one for their needs.

Additional resources are available in the online version of this report.

Visibility, Optimization, Unit Costs, And Automation Matter Most In This Market

The cloud cost management and optimization (CCMO) market continues its meteoric growth. This is driven by three areas: 1) public cloud is a necessary part of an enterprise infrastructure strategy, 2) slowed economic growth has prompted cost-cutting measures and demands justification for any spend, 3) the contraction of the hybrid cloud management world, shifting focus from heavy, complex hybrid cloud management solutions to simpler, less expensive CCMO solutions. Tooling vendors ranging from traditional vendors such as CCMO and hybrid cloud management to adjacent cloud management areas like cloud security, observability and monitoring, and multicloud container platform vendors are either introducing or deepening their CCMO capabilities. At the same time, managed service providers and global systems integrators are widening their CCMO capabilities with broader support of tooling vendors to meet customer demand.

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

- **Support and provide optimization recommendations for all major cloud vendors.** Unified visibility, customized dashboards, and optimized recommendations for all major cloud providers (e.g., Amazon Web Services [AWS], Microsoft Azure, and Google Cloud) are now commoditized capabilities. Vendors that lack visibility or optimization for all major cloud vendors are already behind the market. Only consider these solutions if your organization is primarily a one-cloud shop and has no plans to expand to multicloud or if your organization has other CCMO solutions that fill these gaps. Differentiated vendors offer the deepest and broadest optimization recommendations for virtual machines, Kubernetes instances, storage, GPUs, and serverless services.

- **Tie engineering decisions to business targets.** While this is a nascent capability in CCMO tools, the CCMO market demands greater connection between engineering and operations actions and achieving fiscal targets. Look for tools that provide cloud unit cost economic identification and calculations. Note that most tooling vendors don't have cloud unit cost economics capabilities; the ability to identify and calculate unit costs off-the-shelf is difficult to provide. A successful cloud unit economics practice ties unit costs as closely to the workflow as possible. Despite the difficulty in developing an off-the-shelf capability, continually rising cloud spend will also mean greater demand from the C-suite and board to justify that spend. Look for tools that can calculate unit costs, such as cost per deployment, cost per build, cost per team, or cost per application. Truly

differentiated capabilities can identify unit costs specific to the organization based on spending trends.

- **Integrate with and ingest costs from any solution beyond infrastructure as a service.** Achieving business initiatives requires a total-cost-of-ownership view that spans from public cloud to on-premises infrastructure to software-as-a-service and platform-as-a-service solutions. The definition of "cloud" is expanding past cloud infrastructure services to include costs from software tools and platforms. Traditional CCMO tools that only ingest costs from public cloud vendors are getting quickly outdated. The new generation of tooling bidirectionally integrates with any solution (e.g., Snowflake, Terraform, Salesforce) and does not require a prebuilt integration.

Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market; it doesn't represent the entire vendor landscape. You'll find more information about this market in our reports on FinOps.
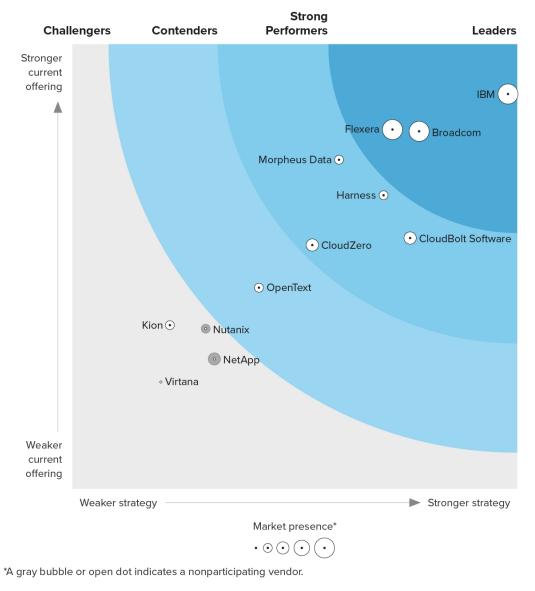
We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figures 1 and 2). Click the link at the beginning of this report on Forrester.com to download the tool.

Figure 1

Forrester Wave™: Cloud Cost Management And Optimization, Q3 2024

THE FORRESTER WAVE™
Cloud Cost Management And Optimization Solutions
Q3 2024

*A gray bubble or open dot indicates a nonparticipating vendor.

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Figure 2

Forrester Wave™: Cloud Cost Management And Optimization Scorecard, Q3 2024

Current offering	Forrester's weighting	Broadcom	CloudBolt Software	CloudZero	Flexera	Harness	IBM
		4.02	2.82	2.74	4.04	3.30	4.44
Access and permissions	3%	5.00	5.00	1.00	5.00	3.00	3.00
Cloud platform support	5%	5.00	3.00	1.00	5.00	3.00	5.00
Resource discovery	5%	5.00	3.00	5.00	5.00	3.00	5.00
Billing administration	5%	5.00	3.00	1.00	5.00	3.00	5.00
Billing democratization	3%	5.00	3.00	1.00	5.00	5.00	5.00
Reporting	5%	5.00	3.00	3.00	5.00	5.00	5.00
Monitoring	3%	5.00	1.00	5.00	5.00	3.00	5.00
Recommendations	20%	3.00	3.00	3.00	3.00	3.00	5.00
Remediation	10%	5.00	3.00	3.00	3.00	5.00	5.00
Cloud platform placement recommendations	10%	3.00	1.00	1.00	3.00	1.00	5.00
Usage policies	3%	3.00	5.00	3.00	5.00	5.00	5.00
Cost planning and assessment	5%	5.00	3.00	3.00	3.00	1.00	5.00
Capacity planning and assessment	3%	3.00	5.00	3.00	3.00	1.00	5.00
Admin portal usability and experience	10%	3.00	1.00	3.00	5.00	5.00	1.00
Support services	5%	5.00	3.00	3.00	5.00	3.00	5.00
Platform experience and service-level agreements	2%	5.00	5.00	5.00	5.00	5.00	3.00
Integrations and APIs	3%	3.00	5.00	5.00	5.00	3.00	3.00

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

	Forrester's weighting	Broadcom	CloudBolt Software	CloudZero	Flexera	Harness	IBM
Strategy		3.90	3.80	2.70	3.60	3.50	4.90
Vision	35%	3.00	5.00	3.00	3.00	3.00	5.00
Innovation	20%	5.00	3.00	3.00	3.00	5.00	5.00
Roadmap	15%	3.00	3.00	1.00	3.00	3.00	5.00
Partner ecosystem	15%	5.00	3.00	3.00	5.00	3.00	5.00
Pricing flexibility and transparency	5%	3.00	5.00	3.00	5.00	5.00	3.00
Supporting services and offerings	10%	5.00	3.00	3.00	5.00	3.00	5.00
Market presence		5.00	3.00	3.00	5.00	2.00	5.00
Revenue	50%	5.00	3.00	3.00	5.00	1.00	5.00
Number of customers	50%	5.00	3.00	3.00	5.00	3.00	5.00

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

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.

Current offering	Forrester's weighting	Kion	Morpheus Data	NetApp*	Nutanix*	OpenText	Virtana*
		1.84	3.70	1.46	1.80	2.26	1.20
Access and permissions	3%	5.00	5.00	1.00	1.00	3.00	1.00
Cloud platform support	5%	1.00	5.00	1.00	1.00	1.00	1.00
Resource discovery	5%	3.00	5.00	1.00	1.00	3.00	1.00
Billing administration	5%	3.00	5.00	1.00	1.00	1.00	1.00
Billing democratization	3%	1.00	3.00	1.00	3.00	1.00	1.00
Reporting	5%	1.00	3.00	1.00	3.00	1.00	1.00
Monitoring	3%	1.00	5.00	3.00	1.00	1.00	1.00
Recommendations	20%	1.00	3.00	1.00	1.00	3.00	1.00
Remediation	10%	3.00	3.00	3.00	3.00	3.00	1.00
Cloud platform placement recommendations	10%	1.00	3.00	1.00	1.00	3.00	3.00
Usage policies	3%	3.00	5.00	1.00	1.00	1.00	1.00
Cost planning and assessment	5%	1.00	1.00	1.00	1.00	1.00	1.00
Capacity planning and assessment	3%	1.00	5.00	1.00	1.00	1.00	1.00
Admin portal usability and experience	10%	3.00	5.00	1.00	3.00	3.00	1.00
Support services	5%	1.00	3.00	3.00	5.00	1.00	1.00
Platform experience and service-level agreements	2%	1.00	3.00	3.00	3.00	3.00	1.00
Integrations and APIs	3%	3.00	5.00	3.00	1.00	3.00	1.00

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

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	Forrester's weighting	Kion	Morpheus Data	NetApp*	Nutanix*	OpenText	Virtana*
Strategy		1.10	3.00	1.60	1.50	2.10	1.00
Vision	35%	1.00	1.00	1.00	1.00	1.00	1.00
Innovation	20%	1.00	3.00	1.00	1.00	3.00	1.00
Roadmap	15%	1.00	5.00	1.00	1.00	1.00	1.00
Partner ecosystem	15%	1.00	5.00	3.00	1.00	5.00	1.00
Pricing flexibility and transparency	5%	3.00	5.00	3.00	3.00	3.00	1.00
Supporting services and offerings	10%	1.00	3.00	3.00	5.00	1.00	1.00
Market presence		2.00	2.00	3.00	2.00	2.00	1.00
Revenue	50%	3.00	1.00	3.00	3.00	1.00	1.00
Number of customers	50%	1.00	3.00	3.00	1.00	3.00	1.00

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

Forrester evaluated the offerings listed below (see Figure 3).

Figure 3

Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
Broadcom	VMware Tanzu CloudHealth	N/A
CloudBolt Software	CloudBolt	N/A
CloudZero	CloudZero	N/A
Flexera	Flexera One	N/A
Harness	Cloud Cost Management	N/A
IBM	IBM FinOps	IBM Turbonomic and Apptio Cloudability, acquired in late 2023
Kion	Kion	V3.9
Morpheus Data	Morpheus	v7.0
NetApp	Spot by NetApp	N/A
Nutanix	Nutanix	N/A
OpenText	Hybrid Cloud Management X (HCMX)	Version — 24.2
Virtana	Virtana	N/A

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Vendor Profiles

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

Leaders

- **IBM provides the most complete full-stack CCMO solution.** IBM is known for the acquisition of its two strong CCMO solutions: Cloudability and Turbonomic. The combination of these two solutions has the potential to create the deepest and widest CCMO solution in capability. Its strategic strength is its ambitious roadmap where it plans to integrate Cloudability and Turbonomic in a single portal. As of yet, this delivery has not come to fruition, making this ambition also its biggest weakness if a unified seamless product is not delivered.

  IBM has superior optimization recommendations, remediation, cloud platform

placement, and usage policies capabilities. It needs to improve its access and permissions, specifically its ability to customize prebuilt personas. Reference customers like IBM for its breadth of capabilities but would like to see more granular permission customization and lower pricing thresholds that are independent of its mandatory purchase of consulting services. IBM has responded with an updated pricing structure with multiple entry points, but all tiers still require the purchase of additional services for implementation and customization. IBM is best suited for enterprises looking for a full-stack solution with the wallet to back its high prices.

View IBM's detailed scorecard.

- **Broadcom continues its leadership in cloud cost management.** Broadcom's CloudHealth remains a stalwart leader and one of the de facto solutions in this space. While CloudHealth continues to hold a major audience in this space, Broadcom's reputation threatens stunted innovation. Although the current roadmap promises market-leading capabilities, customers fear that Broadcom's history of limiting R&D and innovation will extend to its VMware acquisition. This fear has meant increased customer attrition and caused potential new customers to look elsewhere. Tanzu, CloudHealth's business unit, has also embarked on a confusing new go-to-market strategy through an unlikely partnership with Arrow Electronics. These new moves and disruption in the larger VMware ecosystem threaten CloudHealth's roadmap and future.

  Broadcom has superior access and permissions with its FlexOrgs capabilities and depth in reporting and monitoring. The company needs to improve its breadth in optimization recommendations. In the past couple of years, the company has ceded its leadership position for this capability with slowed innovation. Reference customers like its ability to send reports tailored to specific personas and groups. They would like to see feature parity across all major cloud providers and larger breadth in optimization recommendations. Broadcom is a great fit for customers currently invested in the full VMware stack or for those that want a comprehensive AWS and Azure cloud cost management solution and are not troubled by an uncertain Broadcom-directed future.

  View Broadcom's detailed scorecard.

- **Flexera excels in its flexible platform.** Flexera is known for its IT asset management capabilities (ITAM) that integrate with its cloud cost management solution. The company excels in its pricing flexibility and transparency. Flexera

needs improvement in its vision and innovation by expanding beyond an integrated ITAM CCMO solution. Its roadmap has strong points in its plans for sustainability reporting and platform cost data ingestion but needs improvement in providing a fuller, more comprehensive picture. Currently, Flexera risks ceding its leadership position with a narrow roadmap that doesn't account for semi-DIY approaches and other new competitive factors arising in the CCMO market.

Flexera has superior billing administration, resource discovery, and integration capabilities. However, it needs improvements in its cost planning and assessment. Reference customers like the flexibility in data filtering and segregation but would like to see more transparency in its updates. Flexera is a good fit for customers that want a combined CCMO and ITAM solution with open integrations.

View Flexera's detailed scorecard.

Strong Performers

- **Harness brings market-leading features but still lacks depth on commodity capabilities.** Better known for its continuous integration/continuous delivery (CI/CD) product, Harness has leveraged momentum and funding for that business to fuel its CCMO solution. Its innovation is market leading with its auto-stopping and cluster cost breakdown features, to name a few. The company continues to gain differentiation with its roadmap but needs to focus on building out breadth as well in basic optimization.

  Harness is superior in admin portal usability and experience but lacks cloud platform placement recommendations and lags in cost planning and assessments. Reference customers like its dashboards as each provides financial data and analytics lens, but would like to see better permissions, controls, and a stronger forecasting feature. Harness is a good fit for companies that are heavily containers-focused and looking for innovative, market-leading capabilities.

  View Harness' detailed scorecard.

- **Morpheus Data differentiates with its automation capabilities but lags in cost planning.** The company leads in multicloud management and has recently enabled the independent licensing of cloud cost management features within its unified platform. The company's strength is in its pricing flexibility and ability to provide incremental pricing thresholds for those using the full Morpheus set of multicloud management capabilities. However, Morpheus' product vision for

dedicated cloud cost management remains immature as this aspect of its solution is still early in its launch. Its roadmap shows strength by delivering on key commoditized gaps. As these capabilities are delivered, the solution should gain market traction as an adjacent tool to its multicloud management solution.

Morpheus is superior in resource discovery, recommendations, and capacity planning and assessment — the latter being a gap for most CCMO solutions in the market. It needs improvement in reporting and cost planning and assessment. Reference customers like its multicloud management capabilities but are waiting to see proof of its ability to manage cloud costs. Morpheus is a good fit for companies looking for a multicloud management solution with strong on-premises and infrastructure automation capabilities.

View Morpheus' detailed scorecard.

- **CloudBolt differentiates with management and integration but lags in monitoring.** Under new management, the company has pivoted its focus from multicloud management to managing cloud costs. While the company is still early in its new direction, it has become a strong competitor in the CCMO space. CloudBolt Software has an excellent product vision that reflects an understanding of the key growth areas that are required to improve its position in this market. It needs improvement in building a stronger partner ecosystem. While the company's roadmap shows promising direction, it remains to see whether it can deliver on future promises.

CloudBolt differentiates with its bidirectional integration and its on-premises management built on its prior multicloud management offering. It is superior in access and permissions, usage policies, and capacity planning — an area, as noted above, that is normally a gap for most CCMO solutions. The company needs improvement in cloud platform placement recommendations, and monitoring. It currently lacks any prebuilt integration with third-party monitoring solutions. Reference customers like its seamless management across on-premises and public cloud environments but would like to see more feature parity across the major cloud providers. CloudBolt is a good fit for companies that require hybrid cloud management and a flexible product that will grow with their needs.

View CloudBolt's detailed scorecard.

- **CloudZero provides the broadest set of cost ingestion, but lags in on-prem management.** The company is a long-standing, originally AWS-focused, CCMO

solution. In recent years, it has worked hard to build broader and deeper support across the major cloud providers. It has led the charge with its shift-left and cloud unit cost economics efforts in product capabilities and among working groups in the FinOps Foundation. CloudZero is emerging in its product vision and innovation. It needs to improve its partner ecosystem and build a better go-to-market strategy through channel sales. The company's roadmap focuses on aligning engineering and finance teams but lacks any greater detail.

CloudZero is superior in its API integrations with its AnyCost feature. It lags in billing administration and democratization by relying on external finance systems to perform invoicing. Reference customers like its technical account manager, saying it's "like an extra cost person in FinOps." They would, however, like transparency in logic behind error alerts. CloudZero is a good fit for predominantly public-cloud-focused companies looking for widespread cost ingestion support and cloud unit economics capabilities.

View CloudZero's detailed scorecard.

Contenders

- **OpenText brings depth in hybrid cloud management but lags in commoditized CCMO.** Rooted in hybrid cloud management, this cloud management leader built a dedicated, standalone CCMO solution that integrates into its composable enterprise service management platform in the past year. OpenText brings a superior partner ecosystem by leveraging its long-established partnerships from its Hybrid Cloud Management and Operations Orchestration products. It needs improvement in its product vision, which currently lags behind other competitors. The company provides less than commoditized features, placing its roadmap in a more reactive stance rather than pushing forward market-leading capabilities.

  OpenText is superior in its on-premises and automation capabilities — capabilities that most traditional CCMO tools lack. It lags in cloud platform support with its lack of Google Cloud optimization and billing, and reporting. Reference customers like that its rightsizing recommendations come with orchestration workflow implementations. They would like to see more AI/ML capabilities such as anomaly detection. OpenText is a good fit for companies currently using its Hybrid Cloud Management or Operations Orchestration products that need a cost management lens.

View OpenText's detailed scorecard.

Challengers

- **Nutanix has market-leading customer support but lags in roadmap delivery.**
  Traditionally playing in both the hybrid cloud management and CCMO space,
  Nutanix has pivoted to focusing solely on its hybrid cloud management offering
  and a CCMO consultancy (Nutanix FinOps-as-a-Service). Nutanix's focus on
  security and hybrid cloud management through its Nutanix Cloud Manager is a
  good pivot for a company lacking differentiation in CCMO. Customers should note
  that new capabilities will not be added to its CCMO solution as the vendor only
  plans to maintain its current offering. The company is weak in its roadmap delivery
  with only incremental innovation since 2020 for its CCMO solution.

  Nutanix is strong in plans to deliver a combined security and cloud management
  solution. Few cloud management solutions play in this space and yet security and
  cost are top priority for day two operations. Customers Forrester spoke with like its
  customer support — the vendor has an NPS score of 92. They would, however,
  like to see broader support across cloud providers, though this renewed focus on
  consultancy may be a welcome service for most. Nutanix is a good fit for
  customers currently on its solution. Nutanix declined to participate in the full
  Forrester Wave evaluation process.

  View Nutanix's detailed scorecard.

- **NetApp is strong in basic CCMO but is massively delayed in delivering a unified
  portal.** The company provides a strong, basic CCMO solution through its
  CloudCheckr (2021) and Spot (2020) acquisitions. With ambitions to provide a
  combined solution as far back as 2022, the company still has not integrated the
  two solutions into a unified portal. A common theme with its CloudCheckr
  acquisition is that the company has been slow to deliver on its roadmap. NetApp
  still has a deep channel presence, but lags in its roadmap deliveries. Future moves
  are to integrate its CloudCheckr and Spot solutions, but plans remain unclear for
  the vendor to place itself in a market-leading position.

  NetApp is strong in its channel presence. It lags in providing Google Cloud billing
  and optimization — a CCMO capability that is now considered basic. Customers
  Forrester spoke with like its white-label features but would like to see multi-
  account views. NetApp is a good fit for managed service providers looking for a
  white-label solution and companies just focused on AWS and Azure. NetApp

declined to participate in the full Forrester Wave evaluation process.

View NetApp's detailed scorecard.

- **Kion has a compelling presence in highly regulated industries but lags in basic CCMO.** The company, rebranded from Cloudtamer to Kion, has found new life as one of the only on-premises CCMO solutions. This capability enables customers to meet FedRAMP, SOC 2, and other NIST-based security standards, making it an attractive solution for many government organizations. The company has on-par pricing flexibility and transparency but needs improvement across innovation and its partner ecosystem.

  Kion has strong points in billing administration, cloud platform support, and usage policies but does not differentiate in these areas. It lacks capacity planning and assessment. The company needs improvement in cloud platform support with its lack of Google Cloud optimization, billing democratization, and cost planning and assessment. Reference customers like its on-premises offering and ability to meet FedRAMP requirements. They would like, however, to see improvement in security granularity and exception handling and to have an anomaly detection capability. Kion is a good fit for companies that have stringent regulatory requirements including FedRAMP or must support a non-SaaS deployment via on-prem hosting in the customer's cloud service provider environment.

  View Kion's detailed scorecard.

- **Virtana delivers hybrid cost management but lags in table-stakes CCMO.** Founded in 2008, the company is a long-standing cloud management solution provider. The company's focus is mainly on hybrid cloud infrastructure, making it a weaker player in pure public cloud cost management. Virtana has a strong partner program but needs improvement in vision and roadmap delivery.

  Virtana excels in hybrid observability but lags in most CCMO capabilities including resource discovery, billing, and cost planning and assessment. Customers we spoke with like its predictable pricing with flat-rate offerings. They would, however, like to see greater depth in the product as a whole. Virtana is a good fit for customers already using the Virtana portfolio. Virtana declined to participate in the full Forrester Wave evaluation process.

  View Virtana's detailed scorecard.

Evaluation Overview

We grouped our evaluation criteria 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.

- **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies, including elements such as vision and innovation.

- **Market presence.** The size of each vendor's marker on the graphic reflects Forrester's assessment of its market presence.

Vendor Inclusion Criteria

Each of the vendors we included in this assessment has:

- **The product and its evaluated capabilities are available as a standalone tool.** All vendors evaluated provide a CCMO solution that can be purchased with one SKU. It does not require augmentation from another solution on a basic level of visibility optimization.

- **The product provides optimization recommendations for major public cloud platforms.** All vendors in this evaluation met the minimum requirement of visibility and optimization recommendations for at least two major public cloud providers.

- **The product supports cost visibility for compute, storage, and database for at least AWS, Azure, and GC.** As this is a commoditized capability, only vendors that provided the bare minimum in visibility and optimization were considered.

- **The product revenue is greater than or equal to $10 million.** All vendor products in this evaluation earned $10 million or more in global product revenue from CCMO capabilities.

- **The solution and all capabilities must be generally available by February 29, 2024.** Any capabilities or product announcements after this date were not considered in the evaluation.

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 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 April 24, 2024, 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 our 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 our vendor participation 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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