

BEST PRACTICE REPORT

Capitalize On The VMware Disruption

It's An Opportunity To Modernize

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FORRESTER

Summary

Tech leaders feel disrupted with the VMware business model changes. They are exploring options ranging from maintaining the status quo to radically migrating away from VMware. This situation calls for a careful and comprehensive evaluation of all available options, rather than a hasty reaction. Large enterprises must explore multiple strategies simultaneously. This report gives tech leaders a framework that helps them think through the situation, outlines the possible options, and provides key considerations for each path.

An Opportunity To Modernize

Broadcom [radically changed the VMware business](#) including the licensing, packaging, pricing, and go-to-market strategy. As a result, tech leaders face challenges with drastic price increases, quality of support, utilization challenges, and potential lock-in to VMware technologies. These changes are compelling tech leaders to rethink their IT strategy. Although these moments are [challenging and stressful](#), they also present an opportunity for tech leaders to modernize their infrastructure and explore alternatives that better align to their long-term business goals, rather than a like-to-like replacement. Use this as an opportunity to learn about newer architectures like containers or public cloud services or open-source platforms that can help you prepare for the next long haul. Tech leaders can seize this moment to migrate from VMware to deployment models, architecture, and/or platforms that offer flexibility, scalability, and cost transparency. These transitions can enhance agility, enable innovation, and streamline IT operations.

To Maintain, Migrate, Or Modernize, That Is The Question

Three main options exist — maintain, migrate, or modernize — but those options quickly get complex when you consider the specifics. Most organizations will leverage multiple approaches; some applications will benefit by maintaining the status quo while others benefit from modernization, and migrating out will not be a broad brushstroke across the data center. Before you develop migration plans based on just the VMware sticker shock or the novelty of [any new technology](#), thoroughly assess the nuances of those architectures and technologies. Ensure those align with your business needs; and advance your virtual machine (VM) stack to prepare for the future. You must pick the optimal path(s). Each path requires working with peers from the application, IT operations, and security teams to ensure a comprehensive exit plan and understanding if it entails a change in platform, computing architecture, and/or deployment model. Change on multiple layers usually mandates modernization, whereas migration is usually acceptable for a single change (see Figure 1).

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Figure 1

Changing One Layer Requires Migration, Changing Multiple Layers Demands Modernization

	Platform	Computing architecture	Deployment model	Type of change?
VMware hypervisor, on-premises, or hosted/MSP	No change	No change	No change	Maintain
Other hypervisors: Citrix, Microsoft, Nutanix, Oracle, Opensource, Red Hat Applicants: Oxide, Softiron	Change	No change	No change	Migrate
On-premises containers atop VMs: OpenShift, Mirantis, K8s distros	Change	No change	No change	Migrate
Hyperscalers on-premises services: AWS Outpost, Google Distributed Cloud, Azure Stack, Oracle Distributed Cloud	Change	No change	No change	Migrate
VMware clouds: AWS, Azure, GCP, Alibaba	No change*	No change	Change	Migrate
Native VMs in the cloud (i.e., lift and shift)	Change	No change	Change	Migrate (with performance cautions)
On-premises containers	Change	Change	No change	Modernize
Public cloud containers: AKS, ECS, GKE, Red Hat OpenShift	Change	Change	Change	Modernize
Serverless	Change	Change	Change	Modernize

* Although VMware is still the hypervisor platform used, it can add use of NSX-T and vSAN which may increase VMware usage and require the purchase of net-new VMware SaaS licenses.

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Maintain: Stay With VMware Virtualization

At many firms, more than 95% of servers are virtualized, a strategy that has benefited tech leaders for decades. VMware has been the preferred choice due to its advanced technology, strong capabilities, and supportive ecosystem. For tech leaders it reduced operational risks, enhanced scalability, and enabled seamless management.

Maintaining a status quo, tried-and-true approach minimizes friction, as you stay with the familiar infrastructure. Switching from VMware isn't always practical, as the new platform may not meet all technology requirements. If your organization already uses several VMware products and is content with the support services or channel, and if the current cost is not a significant increase and your renewal is in the near term, you should strongly consider maintaining the status quo (see Figure 2).

Organizations using multiple VMware products benefit from consolidated licensing and existing integrations. The philosophy of sticking with one VMware product and migrating away from others is flawed, as you would still need to subscribe to the package that comprises all products. In [Forrester's Infrastructure Survey, 2024](#), 36% of

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infrastructure hardware decision-makers who work on VMware technologies indicated that their organization is not planning to migrate away from VMware or will increase its use of VMware technologies. Consider retiring or limiting the use of VMware's competing products to achieve ROI. Some organizations are changing up their current state to mitigate their dependence on the platform in the long term, while staying on VMware in the near term. Two common options include:

- **Stay with VMware virtualization while shifting deployment model.** To mitigate the impact of the change, some organizations migrate to [VMware Cloud instances on the public cloud](#) (available via Amazon Web Services [AWS], Microsoft Azure, and Google Cloud). Although this approach gets closer to public cloud platforms, extends the migration/modernization timeline, and mitigates some potential performance challenges, it does not move away from VMware in the near-term — in fact, it doubles down on the stack — adding in NSX-T and vSAN for several organizations. This can be a smart move for organizations seeking to become more public cloud-focused and for those dealing with other deadlines (like colocation contracts) or space limitations while also reconsidering their VMware relationship. This won't be a move away from VMware — yet — but it can position organizations for a less VMware-dependent future.
- **Stay with VMware virtualization while ramping up container usage.** Enterprises not ready to migrate away from VMware often opt to use a (multi-cloud) container platform to launch containers on-premises atop their hypervisors and atop bare metal. They hope to gain short-term operational efficiencies while building up key skills needed to lean away from the VMware stack, even though they plan to benefit from its security and performance in the interim. They plan to remove their VMware-based instances over time, focusing on an alternative hypervisor, or operating containers over bare metal or a cloud platform.

Figure 2
Key Considerations In Maintaining The VMware Hypervisor

Consideration	Description	Why it matters
Number of VMware products	How many discrete VMware products do you use (e.g., vSphere, vSAN, NSX, Aria Operations, Automation)?	VMware's new licensing mandates package (bundle of products) subscription rather than individual products. The number of VMware products in use define the parallel migration streams (across server, storage, network and security) teams. As such, a higher number of products increases your dependence and managing several migrations multiplies risk.
Satisfaction of support	What is your satisfaction level with the new support program?	The support channel, SLAs, and quality of support have changed. You must ensure those meet your business demands.
Change in total contract cost	What is the total cost to renew the VMware license subscription?	VMware license subscription costs have increased several times for most clients and hosting service providers. If it impacts your budgets and finances, you must evaluate all options.
Time to renewal	When does support for your current contract end? How much time do you have before you need to renew it?	Time to renew impacts your decision — maintain or migrate — VMware. It affects budgeting, continuity, and migration planning, ensuring there's no lapse in service or unexpected costs. Aligning renewals with migration plans helps avoid penalties, negotiate better terms, and prevent downtime during transitions.

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Migrate To Alternative Hypervisors

Migration provides several exit paths; some away from current state and some from the VMware platform. For most VMware customers, the least common denominator is often the hypervisor that is deeply embedded into most organizations' tech stacks and VMware products. Although infrastructure leaders can migrate to the next hypervisor, it may limit your options for other groups. Those that migrate may focus on getting off the VMware hypervisor or positioning themselves to do so in the future; often considering a list of ways the change may affect their organization and other products (see Figure 3). The following paths exist:

- **Stay on-premises with another hypervisor vendor.** VMware held the throne as the de facto on-premises virtualization provider for years. However, since the acquisition, several hypervisor vendors like Citrix (XenServer), Nutanix (AHV), Oracle (KVM), as well as supported open-source options like OpenStack (KVM), Proxmox (Virtual Environment), Red Hat (Red Hat OpenShift Virtualization), and Platform9 (Private Cloud Director) are challenging that position. Most of these challengers offer respective virtualization migration tools to speed up the migration process. Several managed or hosting service providers like [Anexia](#), [Beeks Group](#), and [Computershare](#) that were primarily using the VMware hypervisor have since migrated away. Migration becomes tougher with the higher number of products in production use. Among infrastructure hardware decision-

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makers who work on VMware technologies, 35% indicated that their organization will explore, test, or move to similar products from other hypervisor vendors.

- **Migrate to a native public cloud hypervisor.** Hyperscalers often use open-source variants of server virtualization. Tech leaders typically adopt a “lift and shift” approach to migrate virtualized systems to public cloud instances with minimal changes, prioritizing speed. This is considered “day 1” of cloud usage, often leading to performance and cost challenges due to differences between on-premises and cloud platforms. While this path is quick, it may require modernization later. Various migration toolkits are available, and organizations with limited cloud experience should consider professional services from providers like Accenture, Deloitte, and TCS. Among infrastructure hardware decision-makers who work on VMware technologies, 43% indicated that their organization will explore, test, or move to VMware services in hyperscaler or native hyperscaler virtualization.
- **Migrate to hyperscalers’ on-premises infrastructure.** Tech leaders can use on-premises solutions like AWS Outposts, Azure Stack, and Google Distributed Cloud using a lift-and-shift approach yet still landing in their own data center. These offerings enable businesses to run cloud services in their own data centers, benefiting from scalability, automation, and hybrid cloud integration: AWS Outposts provides AWS-managed infrastructure for latency-sensitive, regulated, or data residency workloads. Each provider offers unique solutions, such as Azure Stack and Arc for Azure-like experiences and Oracle’s on-premises cloud for Oracle databases and apps. However, the lift-and-shift limitations noted above still apply here. Among infrastructure hardware decision-makers who work on VMware technologies, 46% indicated that their organization will explore, test, or move to hyperscaler on-premises infrastructure.

Figure 3
Key Considerations For Migrating Hypervisors

Consideration	Description	Why it matters
Workload compatibility	Can your ISV or home-grown apps support the new hypervisor?	Applications, while running on an operating system, use several virtualization features like clustering, fault tolerance, and HA.
External/shared storage	Do alternative hypervisors support your external storage systems, protocols, and architecture?	External storage architects may be limited by your choice of hypervisor; many rely on VMware-enabled performance, scalability, redundancy, HA, VM migrations, and DR.
Connectivity and latency	Does it integrate well with existing networks and cloud services?	Changing the hypervisor impacts network performance, latency, and connectivity due to differences in virtual switches, network drivers, and network optimization. Ensuring proper drivers, configurations, and compatibility is key to latency and throughput.
Cloud consistency	Can the new virtualization integrate with the cloud provider of choice?	Firms increasingly live in a hybrid cloud environment. Managing on-premises and public cloud(s) seamlessly is a prerequisite. Some management platforms only support VMware-based and OpenStack-based private clouds despite supporting multiple public cloud options. Lack of integrations can lead to operational silos, latency, security gaps, impacting overall efficiency, and cost.
Security and compliance	Does it meet local data security, compliance, sovereignty, and regulatory requirements?	Firms are required to meet data security, compliance, sovereignty, and regulatory requirements to avoid legal penalties, data breaches, and service disruptions. Explore whether VMware specifically allowed for your compliance for certain requirements.
Cost model	Is the pricing model (subscription-based, managed service) suitable for your business and how well does it line up with your budget?	Vendors pricing model (per-core, per-VM, subscription, or pay-as-you-go) vary and it must align well with your organizational goals. The new platform pricing model may impact budget planning and cost management.
Hybrid and edge capabilities	Does the new platform allow for connecting seamlessly to cloud environments and to the edge?	The business runs applications across data center, cloud, and edge locations. If this is a requirement for your organization today or tomorrow, ensure the new hypervisor can adapt to locational requirements.
IT operations (observability/ backup/disaster recovery)	How well does the alternative platforms serve the IT operational requirements like the observability, data resiliency, backup and disaster recovery needs?	Operational processes span technologies. Exploration of a new hypervisor should look at the impact of these broader processes and the platforms they run on. Most ITSM platforms support an array of hypervisors, but features may be limited by hypervisor. IT insights gained through monitoring, observability, and AIOps are also essential to your incident management process. Backup and recovery systems are critical to tech and business resiliency. Explore these for limitations for new hypervisors across each of these platforms.

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Modernize Your Legacy Applications With Cloud-Native Architecture

VMware disruption and pricing changes represent an inflection point for organizations to reevaluate infrastructure and application modernization strategies. Alongside the near-term need to decide whether to stay or go is an opportunity to address technical debt or take full advantage of cloud. Rather than simply seeking out the lowest-cost, like-for-like replacement, organizations can seize the moment to modernize the application portfolio and unlock brand new operational efficiencies. Among infrastructure hardware decision-makers who work on VMware technologies, [53%](#) cite

modernizing their applications as among the top motivators for moving away from current hypervisor technology. Although most consider containerization as the natural off-ramp from virtualization, there are nuances and options to consider that align with different organizational capabilities and objectives (see Figure 4). These are your modernization paths:

- **Modernize with a multicloud container platform (and modern app designs).** Like noted above, multicloud container platforms can help launch containers in your environment of choice. Although [containerizing monolithic applications](#) (i.e., lift and shift), does have advantages for operational efficiency, the greater opportunity lies in modernizing using microservices and modern processes. A common approach to modernizing legacy apps is the Strangler pattern which applies to [apps](#) and [processes](#) alike. Companies will use a multicloud container platform or native public cloud container platforms and management solutions. However, there are [multiple options](#) for leveraging Kubernetes. Among infrastructure hardware decision-makers who work on VMware technologies, [37%](#) indicated that their organization will explore, test, or move to on-premises containers based on Kubernetes and bare metal.

Alternative path: One such option is a homegrown container platform built on open standards. For the extremely tech-savvy firm that has the expertise to manage it (often high tech or Fortune 100), building an open-source container platform offers unmatched flexibility and control, ideal for optimizing performance or meeting unique requirements. This approach, although less common than turnkey solutions, demands significant investment in platform engineering talent or professional services. Despite the overhead, it allows organizations to tailor the stack to their evolving needs. For example, Isbank used open-source technologies to create a cloud-native framework that meets strict infrastructure, security, and monitoring standards. Many examples today are power users within the Cloud Native Computing Foundation (CNCF) community or longtime OpenStack users.

- **Modernize with various managed container platforms (and modern app designs).** Organizations with strong developer and DevOps-centric cultures and a desire to minimize infrastructure overhead, often choose managed container platforms. These solutions are available for cloud-native — Google Kubernetes Engine or Amazon Elastic Kubernetes Service, or as hybrid/multicloud platforms like Red Hat OpenShift. They simplify container orchestration, making it less complex for developers across multiple deployments. This approach works best for organizations that have already invested or plan to invest in cloud-native maturity and containerization skill sets, and that want to balance developer

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autonomy with centralized governance and security controls. Public cloud container platforms are a popular choice: Among infrastructure hardware decision-makers who work on VMware technologies, **30%** indicated that their organization will explore, test, or move to containers in the public cloud.

- **Modernize with serverless.** Moving even further up the stack, some organizations look to serverless as a modernization path to build new apps where appropriate or modernize parts of existing apps. In a serverless setup, you don't need to worry about server management, scaling, or maintenance. Instead, you deploy your code, and the cloud provider handles the rest. As such, serverless can improve developer productivity, operational efficiency, and reduce costs for suitable workloads. VMware customers might consider a serverless-first approach where enterprises seek an option for apps needing autonomous scaling, minimal infrastructure management, scale to zero, and microbilling (pay only for what you use). In some cases, modernization efforts can leverage serverless functions or containers to enable extensibility for legacy applications when a full refactor isn't feasible. [Capital One embraced a serverless-first strategy](#) for net-new applications as part of its effort to go all-in on public cloud. Serverless platforms are also trending among enterprise customers. In [Forrester's Cloud Survey, 2024](#), 39% of public and private cloud decision-makers say that their organization plans to adopt [serverless development platforms](#) like functions as a service (FaaS).

Alternative path: Companies may also look to FaaS at the edge or alternatives to classic serverless options on the public cloud like “serverless containers.” For organizations weary of locking into proprietary public cloud stacks with managed serverless options, the ability to run containers atop serverless functions where an organization can maintain container stack choice via solutions like AWS Fargate and Google Cloud Run is now available.

Figure 4
Key Considerations For Modernization Of Infrastructure And Applications

Consideration	Description	Why it matters
Certification: workload compatibility	How well do your applications and dependencies align with the target platform's runtime environment and supported frameworks?	Compatibility with your target platform's runtime environment directly impacts performance and misalignment can lead to costly rework, technical debt, or project failure if discovered late in the lifecycle.
Connectivity and latency	What are your applications' required service levels regarding network connectivity, latency, and data locality?	Network performance requirements drive design and architecture choices and can significantly impact user experience and application functionality.
Cloud consistency	How important is it to maintain a consistent deployment target and experience across different environments?	Maintaining consistent deployment targets and developer experiences across environments can reduce operational complexity and ensure predictable application behavior regardless of where workloads run. This impacts scaling, disaster recovery, and business continuity planning.
Security and compliance	What level of control do you need over security configurations, and how do regulations impact these needs?	Security and compliance requirements define non-negotiable guardrails for how and where workloads can run and ensure an organization can meet regulatory obligations and protect sensitive application data.
Cost model	How do your workload and usage patterns align with different pricing models like consumption-based vs. reserved capacity?	Alignment between workload patterns and different pricing models impacts total cost of ownership and therefore should significantly influence architecture decisions. Consumption-based models offer cost advantages for more variable workloads, whereas persistent applications tend to benefit from reserved capacity.
Hybrid and edge capabilities	Do you need to support workloads that cut across data centers, edge locations, and cloud environments?	Hybrid and edge capabilities enable organizations to optimize around data gravity, regulatory constraints, and performance needs in specific geographies, but can introduce complexity in the operational model.
Managed and automated	What is your desired balanced and prioritization between platform control and development/operational simplicity?	Balancing platform control against developer and operator simplicity directly impacts efficiency and the ability to innovate. Organizations that prioritize simplicity through managed services can accelerate development and reduce operational burden, at the expense of the ability to fine-tune and fully customize their operational environments.
Integrations	How well does the target approach or platform integrate with existing tools or downrange dependencies?	Integration capabilities are core to the feasibility and complexity of a modernization approach. Legacy integrations in some cases can be enabled with modern patterns and platforms, allowing extensions to legacy capabilities without a full refactor.
Platform complexity	Does our organization have the prerequisite knowledge, maturity, and skill sets to service developers and operate the platform of choice?	Organizational maturity directly influences implementation success, adoption, and platform sustainability. Misalignment between maturity and modernization approach often leads to project failure.

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Apply A Prudent Approach To Advancing Your VM Stack

The journey from traditional server infrastructure to modernized cloud-native architectures is both a significant opportunity and meaningful challenge for enterprises. The destination promises enhanced scalability, and the potential for greater agility in

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development and platform innovation. Getting there requires careful navigation of complex technical and organizational changes. Successful modernization requires more than just technical expertise and leaders that succeed also balance business objectives, architectural decisions, and team capabilities. The most challenging period is in the transition, where current baselines and existing applications must be maintained while the organization ramps up investments, skill sets, and initiatives toward the modernization effort. Enterprises that take the leap should adopt a deliberate strategy and plan around realistic timelines so they can realize the substantial long-term benefits while minimizing cost and risk where possible. To do this:

- **Review business priorities and agenda before undertaking the tech transformation.** Before embarking on a technology transformation, align it with business priorities and strategic goals. Assess the long-term vision, operational needs, and financial constraints to ensure your decisions drive real value. A well-defined agenda will help in prioritizing investments, mitigating risks, and maximizing ROI. Without a clear business-driven approach, tech adoption may lead to inefficiencies or misalignment with company objectives. By reviewing priorities first, businesses can ensure a seamless, scalable, and impactful transformation journey that supports growth and innovation.
- **Identify the right application architecture.** Consider what you are trying to achieve before homing in on a particular technology stack. Organizations seeking to enable agility and take advantage of DevOps practices in their modernization efforts will benefit from modular architectures like microservices and containers, but it does come at the cost of complexity. It is likely that while modernizing a vast estate of VM-based applications, an organization supports multiple architecture and design approaches. Resist the urge to treat any infrastructure paradigm as the goal. Instead, create an architectural framework that enables delivery teams to build on the technologies that maximize the prioritized value of their application modernization effort.
- **Ensure compatibility with existing IT Infrastructure operations technologies.** Before migrating away from VMware, ensure your existing IT operations tool(s) support your new target infrastructure technologies. If they don't, you need additional investments for new tools. These tools range from monitoring, data protection, disaster recovery, log management, and so on. These tools help monitor, manage, and optimize infrastructure performance, minimizing disruptions during migration. Proper support ensures visibility into workloads, security, and compliance, reducing risks associated with shifting platforms. Without robust IT operations backing the move, organizations may face downtime, performance

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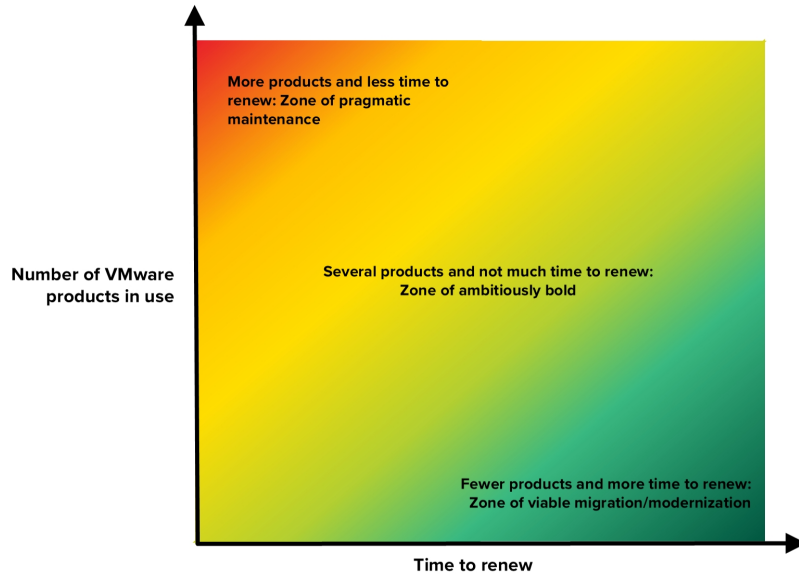
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issues, and operational inefficiencies. Leveraging the right tools ensures seamless migration, better cost control, and continued business continuity in the new environment.

- **Don't leave infrastructure security behind.** Before migrating away from VMware, ensure your existing security tools are compatible with your target infrastructure technologies. It may be tempting to think that security is complete by covering the operating system, VM, or a container pod. Managing the host, hypervisor security, and vulnerabilities change depending on the underlying infrastructure. The changes could be deep and broad. You may also find that your organization has satisfied compliance by leaning on built-in security features from the VMware stack. Elimination of this may mean you can't meet those compliance requirements without additional software or changes to your architecture.
- **Don't underestimate skills for the path you plan.** The infrastructure migration or cloud-native modernization is paved by your people. If your organization has been running most of your applications on VMs for the last decade, those people will encounter new skill requirements along the way. Learning to develop and architect around cloud-native patterns for resilience, scale, security, and cost optimization [will be a journey](#) — not a single sprint. Incorporate training programs and consider partnerships that can level up your workforce as part of your [modernization strategy](#).
- **Prepare for a longer timeframe if you're migrating away from multiple products.** Although a one-off decision may be made within a specific team, multiproduct migrations require buy-in from senior decision-makers (often the CIO). Additional time will be required as it involves more buying centers (see Figure 5). For example, the server team owns decision for virtualization, the storage team oversees vSAN, network and the security teams are involved for NSX, and the IT operations team for the Aria stack.

Figure 5

The Number Of Products And Renewal Time Affect Your VMware Decisions



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