

The Forrester Wave™ : Infrastructure Automation, Q1 2023

The 11 Providers That Matter Most And How They
Stack Up

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Summary

In our 30-criterion evaluation of infrastructure automation providers, we identified the 11 most significant ones — Amelia, BMC Software, Canonical, HCLSoftware, Micro Focus, Microsoft, Progress, Puppet, Red Hat, Resolve Systems, and VMware — and researched, analyzed, and scored them. This report shows how each provider measures up and helps tech leaders select the right one for their needs.

Additional resources are available in the [online version](#) of this report.

Infrastructure Automation Investments Will Be Fragmented Across Many Tools

Business and tech teams alike buy many technologies from many tech vendors. No single automation solution today can serve all needs across all technologies and use cases — so firms end up investing in many automation tools to serve all use cases and scenarios across roles including app developers, infrastructure pros, and security and compliance leaders. Leading automation platforms intend to help enterprises simplify this landscape as much as possible, but most tools remain disparate. And while individual automation tools yield results, investing in multiple disparate tools undermines the business requirements.

As a result of these trends, infrastructure automation platform customers should look for providers that:

- **Manage heterogeneity and operate beyond servers.** Infrastructure automation tools should manage multiple technology stacks with similar capabilities for each. But managing multiple stacks with a single tool is easier said than done. While automation tool vendors manage server technologies like bare metal, hypervisor, and containers well, full-stack automation is needed to deliver true end-to-end automation to serve the speed of business. Today, the ability to drive automation for the storage, network, and security stacks is relatively low. Tech leaders should target automation tools that can operate across all layers.
- **Offer recommendations on what to automate and why.** Automation solutions should help your team do its job by suggesting what to automate and showing the reasoning behind these recommendations. While this capability is currently absent, it's one that vendors are seeking to build in future iterations of their products. Look for this in vendor roadmaps and product visions and hold vendors accountable for this progress as you undergo portfolio reviews.
- **Extend the purview of automation beyond IT and address skill gaps.** The most common challenge tech leaders cite is lack of skills — so look for automation tools that help close this gap. Focus on ease of operations, learning curve, or ramp-up as key metrics. For infrastructure pros, it means the ability to onboard new tech faster and with confidence. For app developers, it's about connecting to their technologies — integrating with their DevOps tool chain and exposing infrastructure services. Security and compliance leaders want to secure infrastructure and fulfill organizational and regulatory compliance needs with as few resources as possible —which automation solutions must help them achieve.

Evaluation Summary

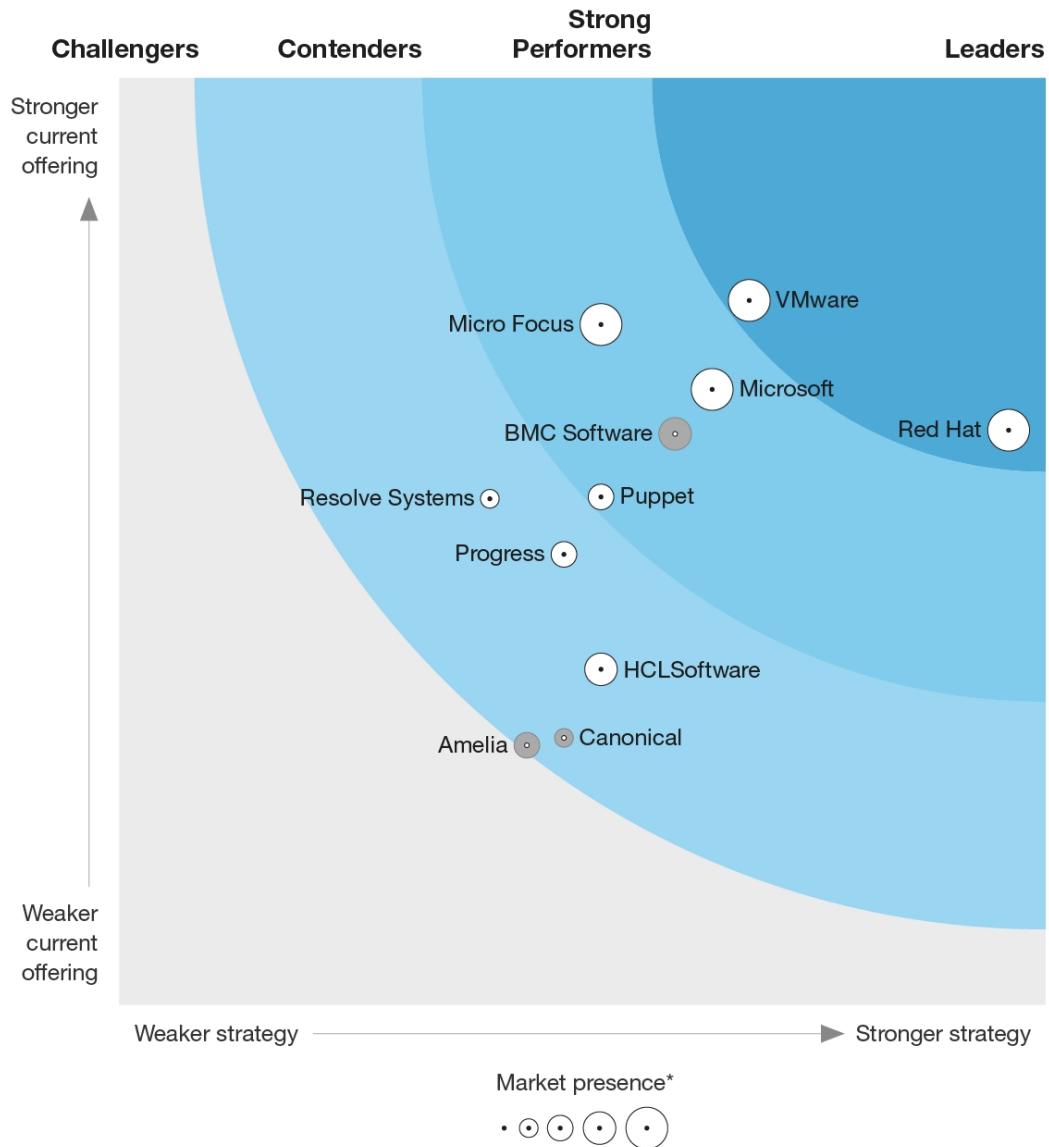
The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market; it doesn't represent the entire vendor landscape. You'll find more information about this market in our reports on [The Infrastructure Automation Landscape, Q4 2022](#).

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™: Infrastructure Automation, Q1 2023

THE FORRESTER WAVE™
Infrastructure Automation
Q1 2023



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

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Figure 2

Forrester Wave™: Infrastructure Automation Scorecard, Q1 2023

	Forrester's weighting	Amelia*	BMC Software*	Canonical*	HCLSoftware	Micro Focus	Microsoft
Current offering	50%	1.40	3.08	1.44	1.81	3.67	3.32
Infrastructure management	20%	1.30	2.90	1.00	1.30	3.70	2.70
Integration	25%	1.75	3.50	1.00	1.75	4.00	3.00
Governance and compliance	25%	1.20	3.30	1.15	2.05	4.50	2.90
Deployment options	10%	3.00	3.00	3.00	1.00	3.00	5.00
Dashboards and reporting	10%	1.00	3.00	1.00	3.00	3.00	5.00
Community support	10%	0.00	2.00	3.00	2.00	2.00	3.00
Strategy	50%	2.20	3.00	2.40	2.60	2.60	3.20
Product vision	20%	3.00	3.00	3.00	3.00	3.00	3.00
Execution roadmap	20%	1.00	3.00	1.00	3.00	3.00	3.00
Planned enhancements	20%	3.00	3.00	3.00	1.00	1.00	3.00
Innovation roadmap	10%	3.00	3.00	3.00	3.00	1.00	3.00
Supporting products and services	10%	1.00	3.00	1.00	3.00	3.00	3.00
Commercial model	10%	3.00	3.00	3.00	1.00	3.00	3.00
Partner ecosystem	10%	1.00	3.00	3.00	5.00	5.00	5.00
Market presence	0%	2.33	3.34	1.67	4.00	4.34	4.34
Revenue	34%	2.00	4.00	2.00	4.00	5.00	5.00
Number of customers	33%	2.00	3.00	2.00	5.00	4.00	5.00
Average deal size	33%	3.00	3.00	1.00	3.00	4.00	3.00

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

*Indicates a nonparticipating vendor

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	Forrester's weighting	Progress	Puppet	Red Hat	Resolve Systems	VMware
Current offering	50%	2.43	2.74	3.10	2.73	3.80
Infrastructure management	20%	1.50	1.70	2.10	1.90	4.50
Integration	25%	2.50	3.00	3.50	3.50	4.00
Governance and compliance	25%	2.00	3.00	3.60	1.50	3.20
Deployment options	10%	3.00	1.00	1.00	5.00	5.00
Dashboards and reporting	10%	3.00	3.00	3.00	3.00	3.00
Community support	10%	4.00	5.00	5.00	3.00	3.00
Strategy	50%	2.40	2.60	4.80	2.00	3.40
Product vision	20%	1.00	3.00	5.00	5.00	3.00
Execution roadmap	20%	3.00	1.00	5.00	1.00	3.00
Planned enhancements	20%	1.00	3.00	5.00	1.00	3.00
Innovation roadmap	10%	3.00	3.00	5.00	1.00	3.00
Supporting products and services	10%	5.00	5.00	5.00	1.00	3.00
Commercial model	10%	3.00	3.00	3.00	3.00	5.00
Partner ecosystem	10%	3.00	1.00	5.00	1.00	5.00
Market presence	0%	3.00	3.00	4.67	2.00	4.67
Revenue	34%	3.00	3.00	5.00	2.00	5.00
Number of customers	33%	3.00	3.00	4.00	1.00	5.00
Average deal size	33%	3.00	3.00	5.00	3.00	4.00

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

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Vendor Offerings

Forrester included 11 vendors in this assessment: Amelia, BMC Software, Canonical, HCLSoftware, Micro Focus, Microsoft, Progress, Puppet, Red Hat, Resolve Systems, and VMware (see Figure 3).

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Figure 3

Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
Amelia	N/A	N/A
BMC Software	N/A	N/A
Canonical	N/A	N/A
HCLSoftware	BigFix 10, MyCloud, iAutomate	BigFix 10, MyCloud, iAutomate
Micro Focus	Data Center Automation Suite, Hybrid Cloud Management X, Operations Orchestration, Network Operations Management	Data Center Automation 2022.11, Hybrid Cloud Management X 2022.11, Hybrid Cloud Management Suite, Operations Orchestration 2022.11, Network Automation Management 2022.11
Microsoft	Microsoft Azure	N/A
Progress	Chef	Chef Server 15.3.2
Puppet	Puppet Enterprise (PE), Puppet Comply (Comply), Continuous Delivery for Puppet Enterprise (CD4PE), Puppet Compliance Enforcement Modules (CEM)	Puppet Enterprise 2021.7.1 (LTS), CD4PE 4.22.0, Puppet Comply 2.10.0, CEM differs for Windows and Linux
Red Hat	Ansible Automation Platform	2.3
Resolve Systems	Resolve Systems	Resolve Actions 7.5
VMware	VMware Aria Universal Suite	No version number (SaaS offering)

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Vendor Profiles

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

Leaders

- **Red Hat leverages its strong open source community to power innovation.** Red Hat is well-known for commercializing open source software for enterprises. It adds capabilities to upstream Ansible via its Ansible Automation Platform; this

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solution includes Automation Hub, Automation Services Catalog, and Insights for Ansible. Red Hat sets the pace of the market by addressing operational challenges, skill gaps, and budgetary pressures. Its strength lies in its community, which has led to solid partnerships and supporting services. Red Hat capitalizes on this ecosystem by adopting and embracing the work of contributors. Key upcoming features include trusted automation supply chain, Event-Driven Ansible, and AI-led automation through Project Wisdom.

Ansible has strengths in configuration management, integration with configuration management database (CMDB), analytics, and community support. It can clearly handle scale: Large global systems integrators lean on it to deliver managed services. Ansible's minimal support for storage contrasts with its strong server and network capabilities; it also lacks multilayered service blueprints, infrastructure templates, and complex orchestration (handling incidents with automated resolutions or remediation). Reference customers find the upgrade path and process troublesome despite their best efforts. They also want more flexibility and better capabilities for business continuity and disaster recovery. Red Hat is a great fit for firms seeking consolidated automation across many infrastructure technologies and vendors.

- **VMware is expanding its automation capabilities beyond its own stack.** VMware is known for its virtualization technology. In 2022, VMware launched Aria, which includes the rebranded vRealize Suite. VMware's Aria includes Aria Automation, Aria Automation Assembler, Aria Automation Orchestrator, Aria Automation Config, and Aria Automation Templates. VMware gives customers an easy path to automatically move between on-premises and cloud licenses. It also boasts a massive partner ecosystem and array of supporting products and services. Key upcoming features include cost management, policy controls, and security.

VMware has strong blueprinting capabilities that are no longer restricted to its stack; support now includes a mix of major public cloud infrastructure service types. Other strengths include orchestration, access governance, analytics, deployment options, and integration with other automation solutions. Notably, Aria Automation Orchestrator comes with many out-of-the-box plug-ins for major IT operations software. VMware lags in patch management, and there are areas where support is still restricted to its own stack. Reference customers value the most recent version's multilanguage support but note that upgrading from older versions was a significant challenge. VMware is a good fit for existing VMware customers, and it is making investments to become more relevant.

Strong Performers

- **Microsoft delivers a software-as-a-service stack that aims at heterogeneity.**

Microsoft is known for products including Windows and its Azure public cloud platform. Its automation portfolio includes Azure Bicep, Azure Blueprints, Azure Automation, Azure Logic Apps, Azure Pipelines, Azure Automanage, Azure Policy, Azure Update Management Center, and Microsoft Defender for Servers. Customer can consume these services collectively, standalone or as a solution, easing implementation but challenging Microsoft to unify its roadmaps, consistencies, and integrations. Microsoft boasts a larger partner ecosystem and an array of supporting products and services. Its product teams are committed to providing feature parity between the Windows and Linux stacks. Key upcoming features include improved automation security, managed service identity, and double encryption for data at rest and in transit.

Microsoft has strong infrastructure provisioning, blueprinting, access governance, DevOps tool integration, and vulnerability management. Azure Bicep, its infrastructure-as-code service, is the wrapper around all Azure service provisioning. Azure Arc extends automation to non-Azure infrastructure. Microsoft lags in capabilities like discovery, application delivery, analytics, orchestration, integration with other automation tools, configuration management, and patch management. Reference customers find Bicep easy to use, but the process of defining non-Azure resources lacks maturity; they noted that most of their challenges relate to the lack of parity across Windows and Linux environments. Microsoft is a good fit for companies that need comprehensive automation around their Microsoft stack.

- **Micro Focus offers strong integrated capabilities but lacks public cloud advancements.** Micro Focus, an IT software behemoth that acquired HP's automation software and other software in 2017, was acquired by OpenText early in 2023. Its portfolio includes Data Center Automation Suite, Hybrid Cloud Management X, Operations Orchestration, and Network Operations Management. Micro Focus has a strong partner ecosystem and supporting products and services but a rather lackluster strategy. Most notably, its cloud-focused capabilities and commercial models lag those of competitors. Key upcoming features include integration with third-party automation tools, vulnerability scanning, and closed-loop automation for patch management.

Micro Focus has a strong current offering with support for a wide array of

infrastructure types and vendors. Other strengths include orchestration, CMDB integration, access governance, analytics, organizational and regulatory compliance, and vulnerability management. It does better than most of its competitors in dashboards and is good at model creation and editing. It is particularly weak in community engagement and areas that require better public cloud options (e.g., deployment options and infrastructure provisioning). Reference customers credited its stability and ease of workflow orchestration; however, it's a lengthy process to build, configure, and get productive on its automation stack. Upgrades are especially cumbersome. Micro Focus is best for enterprises that want a stable offering for IT and compliance professionals.

- **BMC Software has a strong pedigree.** BMC is known for its IT management software. For automation, it combines TrueSight Automation For Servers, TrueSight Automation for Networks, TrueSight Orchestration, BMC Helix Discovery, and BMC Cloud Lifecycle Management — and requires this combination of products for support across infrastructure and cloud solutions. BMC Software has had products in this space for longer than some of its competitors have existed. It has worked hard to modernize its product management practices to accelerate enhancements and offer modern commercial packaging. Its strategy is average among evaluated vendors.

Collectively, BMC Software's products deliver deep capability across orchestration, CMDB integration, access governance, and regulatory compliance. Some interfaces are dated, and its integration with cloud platforms is lacking. Other weaknesses include infrastructure blueprints and community ecosystem. BMC is a good fit for firms that must manage a myriad of systems: mainframe, infrastructure as code, physical servers, and network devices. BMC Software declined to participate in the full Forrester Wave evaluation process.

- **Puppet is strong in task automation but lacks orchestration.** Puppet, which is well-known in infrastructure automation for its open source ecosystem and declarative language approach, was acquired by Perforce in 2022. Its portfolio includes Puppet Enterprise, Puppet Comply, Continuous Delivery for Puppet Enterprise (CD4PE), and Puppet Compliance Enforcement Modules. Puppet's supporting products and services stand out, and its vision and roadmap align well with changing needs in the industry — but prior to the acquisition, Puppet was struggling to execute its roadmap. Its partner ecosystem is smaller than those of its competitors. Key upcoming features include deeper IT service management integrations, identity and access management, and custom policy capabilities.

Puppet has a large community and great engagement. Strengths include regulatory compliance, configuration management, and native integrations with the continuous integration and delivery tools and controls (i.e., DevOps tools) that can be put in place via CD4PE. Puppet has a strong foundation for task-based automation; however, it lacks the orchestration capability that firms use to build blueprints, templates, and automated remediation. Reference customers appreciate the responsive support team, commitment from product leadership, and the training that accompanies new product launches. However, they reported challenges with the UI, reporting, missing disaster recovery capabilities, and limited scalability. Puppet is a good fit for companies that need a strong solution for configuration management and compliance scenarios.

Contenders

- **Progress is only strong in configuration, security, and compliance automation.**

In 2020, Progress acquired Chef, which is well-known for configuration management and its “recipe” concept. Its portfolio includes Chef Enterprise Automation Stack, which is composed of Chef Infra, Chef Automate, Chef Compliance, and Chef InSpec. It boasts a good array of supporting products and services and continues to enjoy strong community participation. Progress’s vision and roadmap plans are lackluster. It intends to expand use cases, build functionality for DevOps pros, and enable vertical capabilities — but this falls short of its competitors. Key upcoming features include job orchestration, security and compliance, and improved user experience.

Progress focuses on delivering infrastructure services for the developers in a compliant manner enforced by a strong policy framework. It is particularly strong in configuration management, security, and compliance management. Progress does not offer a native patch management solution; its capabilities for the rest of automation use cases are relatively weak. Reference customers said that the product is robust but that it took a long time to scale internal adoption and feel comfortable with advanced configuration and maintenance. They also reported that the documentation isn’t straightforward, making it hard to get up to speed quickly. Progress is a good fit for companies that need strong configuration management and have to manage a variety of compliance scenarios.

- **Resolve Systems aims at driving AIOps and automation together.** Resolve Actions strives to be an intelligent automation platform. Resolve envisions that its solution will address skill gaps, be a self-healing platform, and address multicloud challenges. With this focus, it brings a smaller set of predefined automations and

native integrations and relies on customers to build additional solutions as needed. Its execution, product roadmap, and planned enhancements are weaker than those of other evaluated vendors. Key upcoming features include additional acceleration packs, network automation, and identifying automation opportunities.

Resolve's strengths include CMDB integration, integration into other automated tools, and deployment options. It lacks native configuration management, compliance, or vulnerability management support. Resolve has strong integrations with network equipment vendors like Nokia and Ericsson; customers use it for network patch management. Reference customers told us that Resolve Systems serves as a good runbook builder and does well at guided resolution; they also noted that the solution needs to provide more content, have clear and accessible documentation, and enable entire process automation to prevent bottlenecks. Resolve Systems is a good fit for firms that want an integrated solution focused on AIOps, automation, and remediation.

- **HCLSoftware primarily focuses on security and compliance use cases.** In 2019, HCL Technologies, an established global services and consulting firm, acquired BigFix assets from IBM. BigFix is known for its endpoint management products; its automation portfolio consists of BigFix Patch, BigFix Remediate, BigFix Lifecycle, BigFix Compliance, and BigFix Inventory. BigFix has had multiple owners, but loyal customers have used its products for years despite the ownership changes. Reference customers expect the historic innovation pause to vanish under HCLSoftware's reins. Currently, BigFix is undergoing business and technology transformation as it embraces and enables support of the latest technologies. Key upcoming features include consolidating its administrative interfaces, runbook automation, and improved integration with DRYiCE MyCloud — another HCLSoftware offering.

HCLSoftware has a solid foundation with lots of operational flexibility. It delivers a strong compliance management capability that firms use to keep systems compliant in real time. It supports a variety of platforms and operating systems. Tech leaders can automate use cases like inventory and patch management; however, it does not serve other use cases like blueprint creation and orchestration. HCLSoftware's business model does not include open source community support and lacks the benefits that the network effect could provide. Reference customers are of long standing and appreciate its strong OS patch management capabilities but note delayed ramp-up due to its long learning curve. HCLSoftware is a good fit for firms that need to improve security and compliance

and want a flexible yet strong foundational tool.

- **Canonical offers automation but for its own infrastructure stack.** Known for its commercial support of Ubuntu Linux, Canonical typically serves tech-savvy customers seeking affordable mass-scale environments. Canonical's automation portfolio includes Juju, MAAS, Audit, Snapcraft, and Landscape. Its vision is to align the portfolio to the growth of open source and provide the abstraction for a variety of underlying technologies. Although much of Canonical's strategy is on par with other evaluated vendors, it struggles noticeably with execution and supporting products and services. It's difficult for large organizations with heterogeneous technologies to leverage Canonical, as they must maintain a separate parallel automation system to support their full environment.

Canonical builds and delivers automation capabilities for its own Linux distribution and stack. Its application package delivery automation is strong. Because the solution is focused on its own distribution, it lacks capabilities like infrastructure blueprints, orchestration, integration with other tools in the ecosystem, and analytics. Customers say that the vendor is adventurous and willing to try new things, but that community engagement needs improvement and the learning curve for Juju is too steep. Canonical is a good fit for firms with Canonical-based stacks, especially those with a focus on security and compliance management. Canonical declined to participate in the full Forrester Wave evaluation process.

- **Amelia innovates via its natural language interface but requires complex customizations.** Amelia focuses on AI and cognitive solutions for business. Its AIOps platform has roots in an IT automation tool (formerly IPcenter and 1Desk HyperAutomation Platform) focused on business and technology context-driven automation via its orchestration engine. Amelia is making a strong call that the future of automation should have the same natural language processing interface as other business applications; this vision requires a lot of work behind the scenes. It can gain from the first-mover advantage, but the stakes are high, especially given its weaker ability to execute and supporting ecosystem and community. Amelia is building an interpreter that can comprehend the business and technology context to execute best-fit automation.

Amelia focuses on building a remediation system that orchestrates across systems, task-based, and OEM automation tools. Its orchestration engine has a portfolio of common functions for tech pros to build custom workflows. It lacks native provisioning, compliance, or vulnerability management tools and has relatively minimal native integrations, limited infrastructure provisioning options,

and noticeably weaker infrastructure blueprints and reporting dashboards. Amelia is a good fit for hands-on organizations keen to build out customizations that enable innovative automation approaches. Amelia declined to participate in the full Forrester Wave evaluation process.

Evaluation Overview

We evaluated vendors against 30 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 infrastructure management, integration, governance and compliance, deployment options, dashboards and reporting, and community support.
- **Strategy.** Placement on the horizontal axis indicates the strength of each vendor's strategy. We evaluated product vision, execution roadmap, planned enhancements, innovation roadmap, supporting products and services, commercial model, and partner ecosystem.
- **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's revenue, number of customers, and average deal size.

Vendor Inclusion Criteria

Forrester included 11 vendors in the assessment: Amelia, BMC Software, Canonical, HCLSoftware, Micro Focus, Microsoft, Progress, Puppet, Red Hat, Resolve Systems, and VMware. Each vendor:

- **Provides a single solution.** Each vendor has a comprehensive offering that may include multiple integrated products.
- **Has a generally available offering.** Each vendor has a solution that was available for purchase as of November 8, 2022; all capabilities were generally available as of December 7, 2022.
- **Supports infrastructure beyond its own.** Each vendor can automate infrastructure tasks beyond its own infrastructure.
- **Automates server infrastructure.** Vendors have the ability to automate server infrastructure (bare metal, virtual machine, container) tasks.
- **Generates significant client interest.** The vendor offering gets sufficient interest from Forrester clients.

- **Has significant product revenue.** Each vendor has annual product revenue of \$10 million or more.

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 December 21, 2022 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™ And New 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.

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