

Modernize Or Fall Behind: Rethinking IT Infrastructure For A Competitive Edge

Driving Innovation And Efficiency With A Single Unified Platform

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Simplifying Operations To Build A Future-Ready Infrastructure

In today's fast-evolving technology landscape, modernization is no longer optional — it is essential to stay competitive. Organizations must ensure their infrastructure is resilient and capable of supporting advanced applications and software. IT leaders are prioritizing investments in IT infrastructure that streamline operations and support continuous innovation. The right infrastructure provides a strong, adaptable foundation to meet current demands and drive future growth, which cloud-native ecosystems provide. Containers and server virtualizations (VMs) are no longer add-ons to enterprise cloud strategies, but the main event as enterprises revise their strategies based on cloud-native technologies by default. In 2024, 38% of surveyed US enterprise cloud decision-makers indicated their enterprises planned to adopt Kubernetes in public and/or private clouds in 2024 if they had not already.¹

Key Findings



Organizations are experiencing an increased number of standalone instances of VMs and container management solutions.



IT leaders are struggling to manage their disparate infrastructure platforms, leading to operational silos and inefficiencies.



Consolidating VMs and container management solutions into one single platform can simplify management, reduce operations costs, and increase ROI while building a future-ready infrastructure.

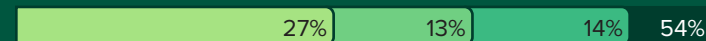
Firms Prioritize Modernization And Security To Stay Ahead

With the rapid evolution of technology infrastructure, IT leaders recognize the critical need for modernization. There is a strong planned effort to enhance cybersecurity, with 54% of survey respondents emphasizing efforts to ensure their infrastructure remains secure and resilient in the face of increasing cyber threats. Nearly half (46%) are also planning to modernize their IT infrastructure in the coming year. More than one-third (37%) are concentrating on simplifying their IT infrastructure management to improve efficiency and reduce operational complexity, freeing resources for innovation. The focus on more streamlined management underscores the increasing need to integrate and manage diverse infrastructure platforms efficiently — such as VMs and container management solutions — in a unified and cost-effective way.

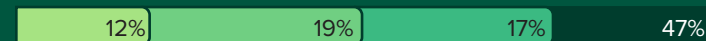
Top Ranked IT Initiatives Over The Next 12 Months

● Rank 1
● Rank 2
● Rank 3

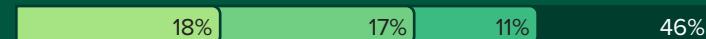
Strengthening cybersecurity efforts/reducing vulnerabilities



Implementing AI within the organization to increase employee efficiency



Modernizing the current IT infrastructure with new cloud and computing architecture



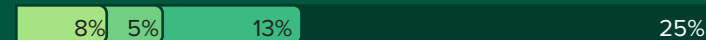
Simplifying the management of different IT infrastructure to decrease operating costs



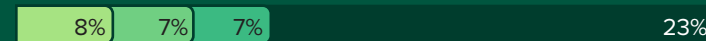
Modernizing business applications and services



Delivering adaptive and resilient operations to customers



Implementing AI to better serve external customers

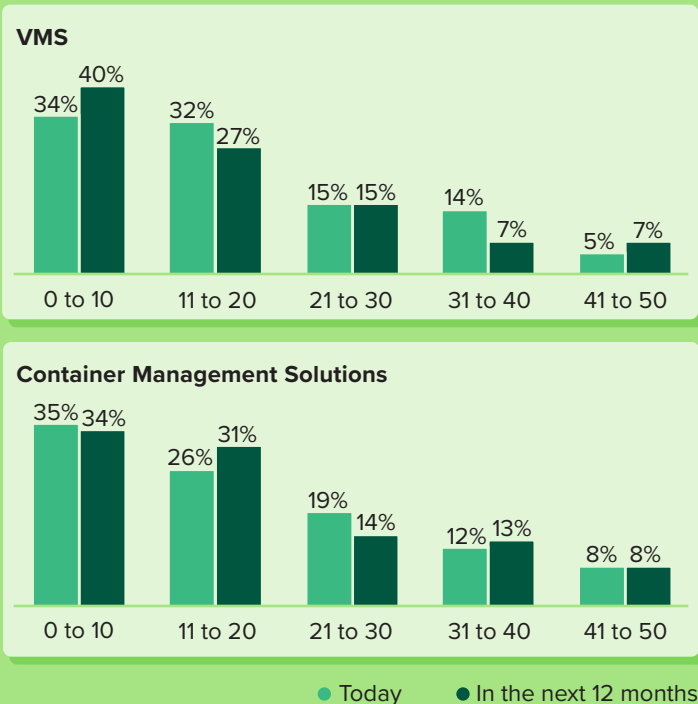


Note: Showing top seven results; individual percentage values may not sum to totals due to rounding
Base: 216 IT decision-makers from the US, EMEA, and APAC with influence over their organization's IT infrastructure strategy and architecture
Source: Forrester's Q2 2025 Cloud Management Solutions Survey [E-63311]

Organizations Grapple With Managing Expanding Siloed Environments

VMs have long been the cornerstone of IT infrastructure, but the emergence of containers has transformed application deployment and management. Today, organizations increasingly use them together, running containers in VMs. It is therefore no surprise that the number of standalone instances (individual, isolated deployments) of VMs and container management solutions are also on the rise. Our study found that two-thirds of organizations have 11 or more instances of both VMs and container management solutions. IT infrastructure must scale seamlessly to handle growth, seasonal spikes, or sudden shifts in user behavior.²

Standalone Instances Of VMs And Container Management Solutions Deployed At Organizations Today Versus In The Next 12 Months

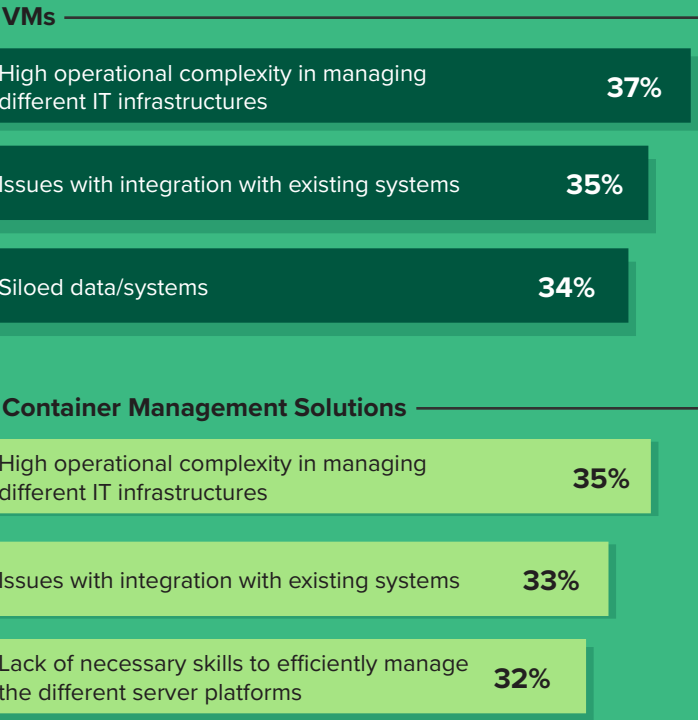


Breaking Down Silos To Build On Infrastructure Modernization

IT leaders face challenges that stem from the way their current environments have evolved, which is motivating them to consolidate and modernize their IT infrastructure. Their most pressing issues are siloed infrastructure and poor operational efficiency, which decrease productivity and growth.

Since VMs and container management solutions address different, yet interrelated, needs, organizations face consistent challenges managing them. For example, respondents cited the high operational complexity and challenges integrating with existing systems as the top challenge with both. Notably, 34% identified siloed data and systems as a significant challenge in effectively managing VMs, while 32% cited the lack of skills needed to manage different server platforms supporting container management solutions. This further highlights the need for a unified and streamlined IT infrastructure approach.

Challenges Organizations Face With Managing Server IT Infrastructure



Note: Showing top three results for each
 Base: 216 IT decision-makers from the US, EMEA, and APAC with influence over their organization's IT infrastructure strategy and architecture
 Source: Forrester's Q2 2025 Cloud Management Solutions Survey [E-63311]

IT Leaders Push For Unified VMs And Container Management Solutions Amid Growing Challenges

Although there is high demand for unification, many IT leaders face challenges managing the growing number of VMs and container platforms. Eighty-four percent of respondents reported struggling to oversee the different tools and platforms used for managing these solutions. Driving this struggle is the rapid proliferation of VMs and container management solutions across organizations.

The growing complexity has prompted decision-makers to seek more efficient ways to simplify their IT operations. According to our study, 85% of IT decision-makers want to have a single unified platform that can manage both VMs and container solutions. Additionally, 83% of IT leaders want this platform to integrate seamlessly with existing systems while supporting new technology adoption.

“To what extent do you agree with each of the following statements regarding your server infrastructure?”

My organization wants to have container management solutions to drive innovation in cloud-native and microservices architectures

42% 47% 89%

My organization is taking a pragmatic approach to its server infrastructure to achieve its business outcomes

53% 35% 88%

My organization wants to have a single, unified platform that can manage both server virtualization (VMs) and container management solutions

46% 38% 85%

My organization is struggling to manage the different platforms used to manage server virtualization (VMs) and container management solutions

52% 32% 84%

My organization is adopting more container management solutions to better manage the different types of workloads

31% 53% 84%

My organization wants to have a single, unified platform that can integrate both existing systems and adopt new technologies

53% 31% 83%

● Agree ● Strongly agree

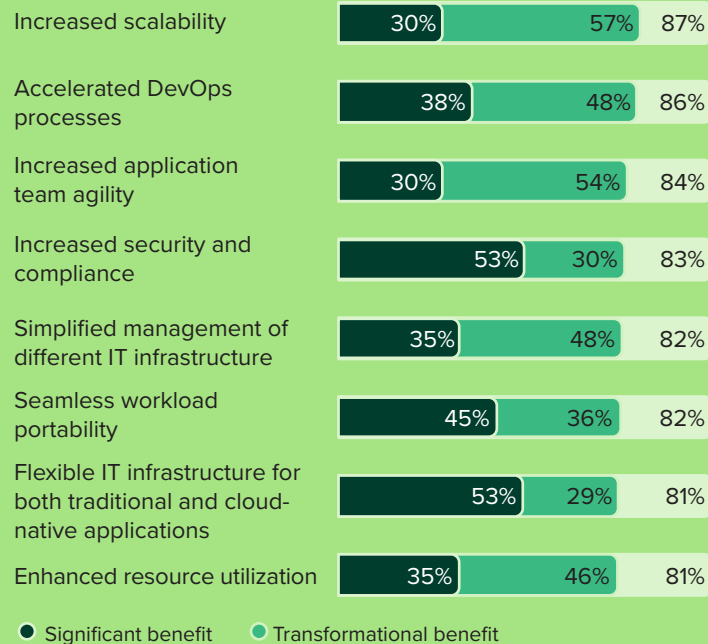
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Base: 216 IT decision-makers from the US, EMEA, and APAC with influence over their organization's IT infrastructure strategy and architecture
Source: Forrester's Q2 2025 Cloud Management Solutions Survey [E-63311]

The Future-Ready Solution: A Unified Platform For Simplified Management And Enhanced Scalability

Going forward, more than 80% of respondents expect this single platform to deliver multiple transformational benefits such as increased scalability (87%), simplified management of different IT infrastructure (82%), and flexible IT infrastructure for traditional and cloud-native applications (81%).

A unified platform benefits not only central IT but also application teams, offering more than improved infrastructure management. Most respondents expect this platform to not only accelerate DevOps processes (86%) but also increase application team agility (84%). It provides app-specific advantages, which strengthen an organization's ability to be agile and meet evolving business needs.

“To what extent would you expect to see each of the following benefits from having a single integrated platform that can manage both VMs and container management solutions?”

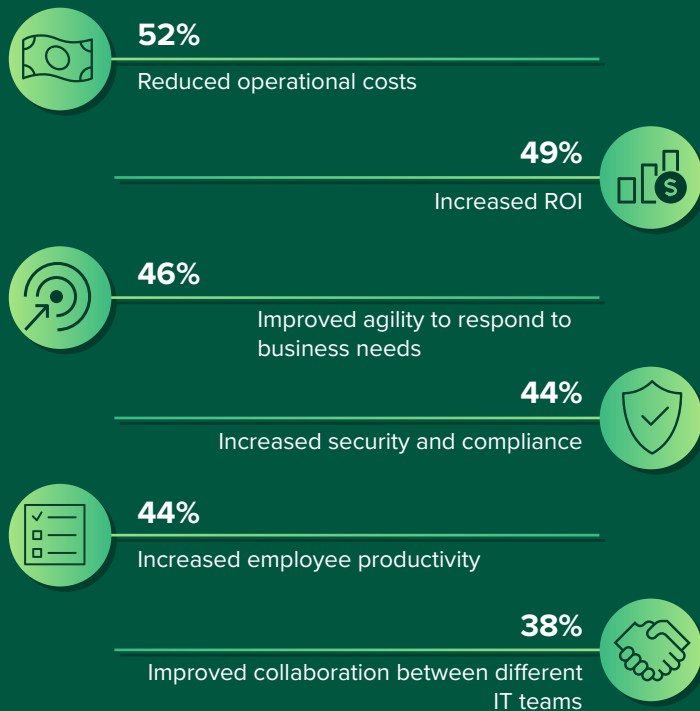


A Single Unified Platform Reduces Operational Costs And Increases ROI

Most IT decision-makers recognize the long-term advantages of adopting a single unified platform. Respondents believe it would not only reduce operational costs (52%) and increase ROI (49%) but also improve their organizations' agility to meet business demands (46%) and strengthen security and compliance efforts (44%).

Although budget constraints remain a key concern due to economic uncertainty, our study found that other challenges often precede it, such as lack of skills to manage the single platform and resistance to changing the current IT infrastructure.³ Overcoming these challenges is critical for organizations to unlock the full potential of a single unified platform.

Downstream Impacts From The Benefits Of Having A Single Unified Platform



Conclusion

With technology rapidly advancing, it has become imperative for organizations to modernize their tech stacks to maintain a competitive edge. IT decision-makers must rethink their infrastructure options to address growing complexities, operational inefficiencies, and security challenges. The proliferation of VMs and containers — largely driven by their interconnected nature, with the vast majority of containers running in VMs — has added to these complexities, underscoring the need for a single unified platform. Such a platform can simplify operations, strengthen security, improve scalability, and align IT infrastructure with broader business goals.

Although budget constraints may pose challenges, the long-term benefits — such as reduced operational costs, improved ROI, and enhanced organizational resilience — make the investment in modernization a forward-looking decision.

Endnotes

¹ Source: [The State Of Cloud In The US, 2024](#), Forrester Research, Inc., November 15, 2024.

² Source: [How To Select Your Compute And Abstraction Technology](#), Forrester Research, Inc., August 14, 2025.

³ Source: [The Top 10 Trends In Infrastructure, 2024](#), Forrester Research, Inc., October 18, 2024.

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Forrester's [Technology Architecture And Delivery](#) research group



Methodology

This Opportunity Snapshot was commissioned by Broadcom. To create this profile, Forrester Consulting supplemented this research with custom survey questions asked of 216 IT decision-makers from the US, EMEA, and APAC with influence over their organization’s IT infrastructure strategy and architecture. The custom survey began and was completed in June 2025.

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Demographics

COUNTRY	
Australia	8%
Germany	21%
Japan	10%
South Korea	7%
United Kingdom	20%
United States	34%

LEVEL OF INTEREST IN IT INFRASTRUCTURE TOOLS (VERY/EXTREMELY INTERESTED)	
Server virtualization (VMs)	91%
Kubernetes	84%

INDUSTRY (TOP SIX)	
Technology and/or technology services	17%
Financial services and/or insurance	14%
Manufacturing and materials	12%
Telecommunications services	11%
Business or professional services	7%
Consumer product goods and/or manufacturing	6%

CURRENT DEPARTMENT	
IT	66%
IT operations	34%

Note: Percentages may not total 100 due to rounding.

Demographics

CURRENT POSITION	
Vice president of information technology	24%
Director of engineering	12%
Systems engineer	9%
Director of DevOps	9%
Cloud architect	8%
Director of cloud	7%
Director of infrastructure	5%
Cloud engineer	4%
Vice president of technology	3%
Platform engineer	3%
DevOps engineer	3%
Director, cloud center of excellence	2%
Infrastructure engineer	2%

CURRENT POSITION, CONT	
Vice president of cloud	1%
Vice president of operations	1%

ANNUAL REVENUE (USD)	
\$1B to \$2.49B	22%
\$2.5B to \$4.99B	20%
\$5B to \$7.49B	15%
\$7.5B to \$9.99B	12%
\$10B to \$14.99B	11%
\$15B to \$24.99B	10%
\$25B to \$49.99B	7%
>\$50B	4%

Demographics

AVERAGE PERCENTAGE OF IT INFRASTRUCTURE CURRENTLY DEPLOYED	
On-premises/private cloud	45%
Hosted private cloud	30%
Public cloud	25%

LEVEL OF RESPONSIBILITY FOR ORGANIZATION'S IT INFRASTRUCTURE STRATEGY/ARCHITECTURE	
Final decision-maker	57%
Part of a team making decisions	26%
Influence decisions	17%

HOW ORGANIZATION OPERATES SERVER VIRTUALIZATION (VMS) AND CONTAINER MANAGEMENT SOLUTIONS	
My organization uses on-premises server virtualization (VMs) and container management solutions in both public cloud and on-premises/colocation data center	67%
My organization uses server virtualization (VMs) and container management solutions in the on-premises/colocation data center only.	33%

Note: Percentages may not total 100 due to rounding.

A hand is shown in profile, reaching towards a futuristic digital interface. The interface features a large circular gauge with multiple concentric rings and segments, some of which are highlighted in green. In the center of the gauge are three interlocking gears. The background is dark and filled with various digital elements, including lines, dots, and faint icons, creating a high-tech, data-driven atmosphere. The Forrester logo is prominently displayed in the center of the image, overlaid on the hand and the digital interface.

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