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CloudBolt Industry Insights Report:

The Truth About First-Generation Cloud Management Platforms:

A Focus on VMware vRealize Automation

Setting the stage

CloudBolt Industry Insights (CII) has a mission of providing a different type of research for enterprise C-suite, IT Admins, and Developers. CII zeroes in on specific dimensions of hybrid cloud and examines each's role in digital transformation. In this report, CII focuses on the realities presented by VMware's vRealize Automation (vRA) – and the challenges even the venerable first-generation leader in cloud management must contend with in meeting evolving cloud requirements.

With at least 80% market share as a virtualization platform, VMware is easily the market king. Therefore, it's not surprising that when people wished to extend private and public cloud usage and needed a cloud management platform, many chose vRA to manage and automate their hybrid cloud IT infrastructure.

But that led to the single biggest question mark emerging out of this CII report:
Will existing vRA customers, currently on version 7.6 or earlier, make the migration to vRA 8.0+ prior to the sunsetting of support for vRA 7.x (currently scheduled for September 2022 – which already got pushed back once from April 2022)? And for those who will choose not to, why?

Key Findings

In May-July 2021, CloudBolt commissioned a global survey leveraging Pulse Research's proprietary platform and vast IT audience. The survey was opened to companies of all sizes

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and 200+ responses were collected from vRA customers globally. The distribution of titles for respondents ended up being Director (56%), VP (27%), and CXO (17%). They answered a series of 11 vRA-specific questions, from which an interesting picture clearly emerged.

VMware, and its vRA product specifically, may be struggling with the New Cloud Order. Gone are the days of one public cloud and all workloads being on VMware. Organizations want to offer true self-service across multiple clouds and virtualization platforms. They want Terraform, they want CI/CD/CIT, they want DevOps. These are challenging requirements – even for a market leader. Here are some of the most informative insights:

1 **Wait and See**: vRA 8 has been available since October 2019, yet **only 2% have deployed it**.
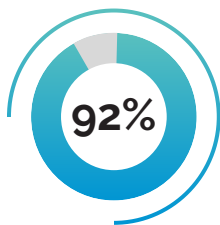
2%

2 **It's the Custom Code, People:**
The top 3 problems with vRA revolve around integrations
      a. 'Enormous amount' of custom code required
      b. Major releases cause huge re-writes
      c. Low to no visibility of what flows through integrations

3 **92%**

Everybody's Integration Problem:
Among vRA customers -
      a. 59% have more than half of all their integrations custom coded
      b. **92% have more than a quarter of all their integrations custom coded**

4 **The Better to Integrate With, My Dear:**
vRA customers are becoming impatient with the inability to integrate with multiple solutions and tools. 68% cited this as the single most important improvement vRA can make.

5 **Reasons to Leave:**
The Top 2 reasons companies cite for wanting to leave vRA -
      a. Pain of migrating to vRA (custom coded integrations and workflows must ALL be rewritten)
      b. Pressure to buy "Enterprise" edition to maintain current capabilities (Enterprise is nearly double the cost of other editions)

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6 **Not Before They Have To:**
vRA customers appear to be taking their time to migrate to vRA 8. 79% say they'll do it sometime in the next 12 months, with only 57% being more definitive and saying they will migrate in 2022 specifically.

7 **The Terraform Both/And Equation:**
91% of vRA customers currently use, plan to use, or want to use Terraform for Infrastructure-as-Code. More tools = more integrations. Customers want easier ways to adopt new hybrid cloud technologies.
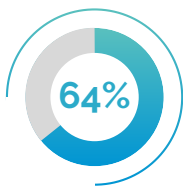
91%
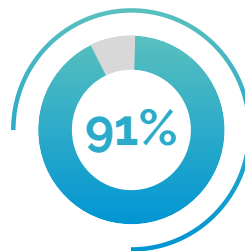
Ultimately, these key findings from the research can be grouped into three primary themes:
- Migration hesitancy surrounding vRA 8
- Top challenges/issues associated with vRA 7
- Augmenting with other tools to make vRA better
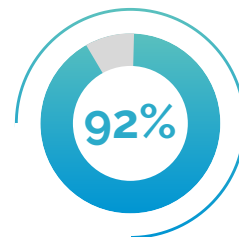
The Trouble with vRA 7

While other problems were identified, the following were cited as the **Top 3 challenges with vRA 7**:

64%

- **Requires enormous amount of custom code (64%)**
- Movements to major releases require re-writes of all custom-built integrations (59%)
- Lack visibility around what moves in and out of integrations (53%)

Requires enormous amount of custom code

92% of respondents have custom coded at least one quarter of their integrations in vRA; 59% have at least half. Automation does NOT happen without integrations. Considering the time, expertise, continual care and feeding required to create and maintain vRA integrations, it's no surprise customers have delayed a move to the latest edition.

92%

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Every major release = a major rewrite of everything

Another huge contributing factor to delayed vRA 8 deployments is most custom integrations for vRA 7 will have to be re-written for vRA 8. The time and effort alone are forcing organizations to re-evaluate the Return on Investment (ROI) with vRA and potentially consider alternatives. **59% of respondents view this as a significant issue**.

59%
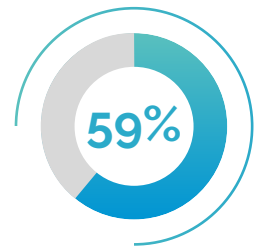
Many have scars from the vRA 6 to 7 migration upheaval. Similar motion is required for vRA 8, and customers are much more hesitant this time around. It's a bit surprising VMware didn't address this issue after the prior backlash.

Lacking visibility into what moves in and out of integrations

Tracking and visibility seems to generally be an issue for hybrid cloud deployments. And given the amount of custom coded integrations vRA customers have, tracking and seeing the flow of data between those integrations becomes exponentially more challenging (for example, the ability to visualize, audit, or troubleshoot from the component level integrations such as IP/DNS assignment, networking, security, and configuration/directory/service management). 53% of respondents recognize that vRA simply does not provide this information – and neither does any custom coded integration.

Hesitancy Migrating to vRA 8

Despite vRA 8's release in October 2019, in reality very few vRA customers have actually made the transition from vRA 7 to vRA 8. Of those surveyed, only 2% report completing that migration. That's a very small number over a relatively long period of time. Why the hesitancy? 9% are "Undecided" and 1% are "Not Migrating."

That means roughly ~88% of vRA customers plan to stay on vRA for the near future or will begin evaluation of alternatives sometime leading up to September 2022, when VMware ends support for vRA 7.

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So if not now, when?

79% said they would deploy vRA 8 in the next 12 months (2H 2021 & 1H 2022). 57% plan to deploy vRA 8 in 2022. Regardless of exactly when, the next 18 months will prove a pivotal time for vRA customers. With thousands of vRA customers looking to migrate around similar timeframes, there could likely be a shortage of available resources to help. The sooner a customer decides to move, the better.

For some, it's easier to say goodbye

For those respondents who have already decided to move away from vRA, two major reasons were cited: pain of migrating to vRA8, and pressure from VMware to buy Enterprise edition to maintain current capabilities.

As the end of support date for vRA 7 approaches, it is likely more customers will seek alternatives for similar reasons.

What they really, really want

The lack of quality and ease of integrating vRA with other tools seem to be the major digs against vRA. The time, cost, and inconvenience of custom coded integrations has vRA customers delaying deployment and considering alternatives.

Top 3 Wants (How would you improve vRA?)
1. **Better ability to integrate multiple solutions and tools (68%)**
2. Deeper-level integrations (62%)
3. Eliminate need for rewrite of integrations with each major vRA release (62%)

68%
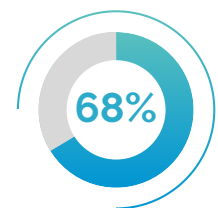
Additional items sought to improve the vRA experience:
- Less need for custom-coding (49%)
- More out-of-the-box integrations (40%)
- More expansive public cloud provisioning capabilities (23%)

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Popular Additions to Make vRA Better

In the end, despite the delays in making the jump from vRA 7 to vRA 8, companies will migrate. But as the New Cloud Order continues to become increasingly more complicated, customers will need more than just vRA to be effective. The goal is to use vRA as a framework and make it better by integrating other tools and capabilities.

What are the most popular tools used in conjunction with vRA?

50%
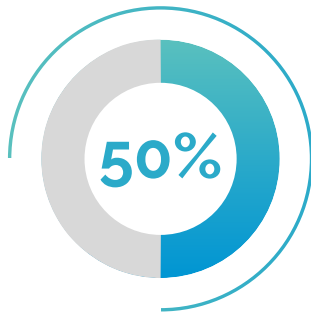
- **Terraform (50%)**
- Ansible (41%)
- Chef (39%)
- Puppet (37%)
- SaltStack (16%)
- ServiceNow (15%)
- Public Cloud native tools (15%)

Terraform and Ansible continue to occupy vital space in IT hybrid cloud environments, but often require multiple custom coded integrations to automate some hybrid cloud process.

How popular is Terraform use with vRA?

25% are using Terraform with vRA today	Only 5% are 'Not Interested' in using Terraform with vRA	32% are considering Terraform instead of vRA
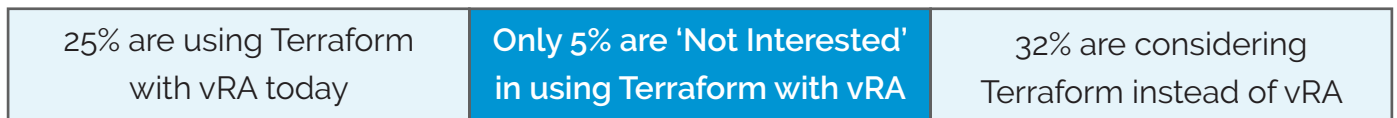
There will always be a steady stream of new technology to improve the new cloud order. It's part of how the mindset is shifting in IT. Terraform is the 'New Kid on the Block,' similar to Ansible and Chef before it.

BUT… regardless of what's next, the use of new technology today and tomorrow requires even more elegant and adaptable integrations. You can't automate processes and systems that can't talk to each other.

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The Bottom Line

1 Many vRA customers are approaching a decision point:
- Remain tied to VMware management tools and make the best of it
- Evaluate alternatives and see what the market competitively offers, or
- Augment vRA with complementary tools that create "better together" outcomes

2 There are some issues with vRA that customers should be aware of prior to purchase or migration (existing customers already know this):
- Integrations are largely built using custom code. The more integrated, the more automation potential but…
- Poor integrations = poor automation = huge labor requirements and costs

3 Terraform is a popular addition to vRA (and likely most hybrid cloud environments). Hopefully VMware finds better ways for customers to utilize emerging cloud technology more easily (stop requiring so much custom integrations)

The next 12-18 months will be telling to see if vRA is able to adapt and maintain leader status as the New Cloud Order unfolds.

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About Pulse Research

Pulse is a social research platform trusted by 27K+ verified CxOs and global tech leaders. These executives rely on the community to make connections, share knowledge, get advice, and stay on top of current trends in the technology space. The questions, polls, and surveys posted in the platform are curated in Pulse's reports, which reflect what tech leaders care about right now. In the rapidly evolving world of software, real-time data and insights are what matter most.

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CloudBolt Software is the enterprise cloud management leader. Our comprehensive solutions for IT automation, orchestration, self-service IT, cost optimization, and security help enterprises simplify complexity and achieve rapid time-to-value anywhere on their hybrid cloud, multi-cloud journey. Our award-winning cloud management platform and infrastructure integration services are deployed and loved by enterprises worldwide. Backed by Insight Partners, CloudBolt Software has been named one of the fastest-growing private companies on the Deloitte Fast 500 and Inc. 5000 lists. In addition, CloudBolt is 2020 CODiE award winner for best cloud management solution and featured in Gartner's Magic Quadrant for Cloud Management Platforms.

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JOIN THE CONVERSATION

Appendix:

Methodology

REGION

81%

2%

9%

6%
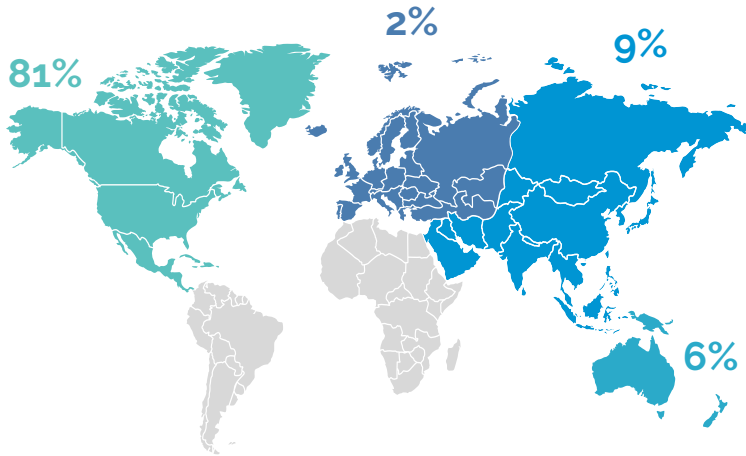
ROLE IN ORGANIZATION

56%

27%

17%

Director | VP | CxO
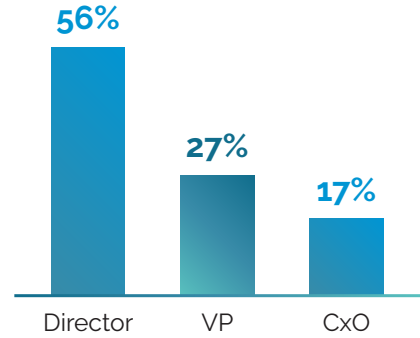
RESPONDENT BREAKDOWN

200 Respondents

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Survey Data:

1

What other tools do you currently use with vRA? (Select all that apply)

Terraform	50%
CloudBolt	46%
Ansible	41%
Chef	39%
Puppet	37%
SaltStack	16%
Public cloud native tools	15%
ServiceNow	15%
Morpheus	7%
Other	0%
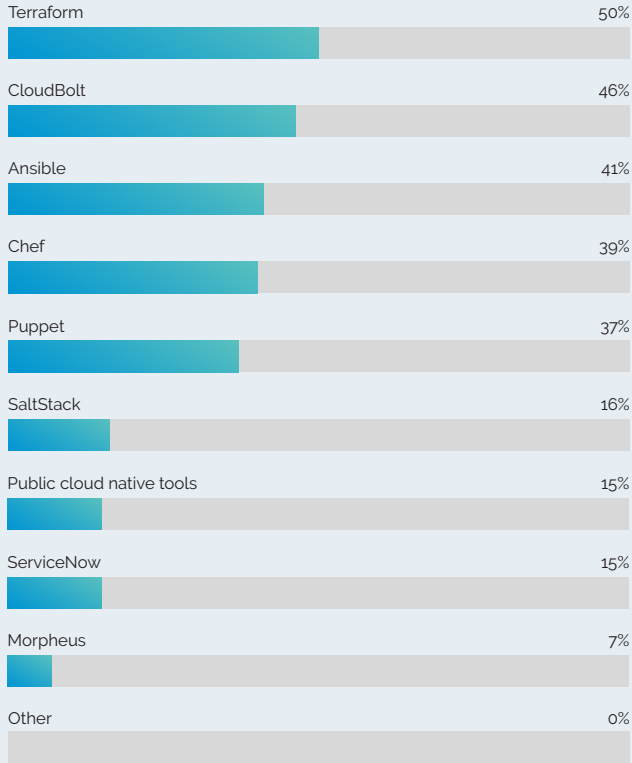
N = 200 technology leaders

2

What challenges does your organization face when using vRA for orchestration and automation? (Select all that apply)

Requires enormous amount of custom code	64%
Movements to major release requires re-writes of all custom-built integrations	59%
Lack visibility around what moves in and out of integrations	53%
Solution complexity (difficult to create blueprints and automation content and keep updated)	47%
Price	26%
None - I like everything about vRA	1%
Other	0%
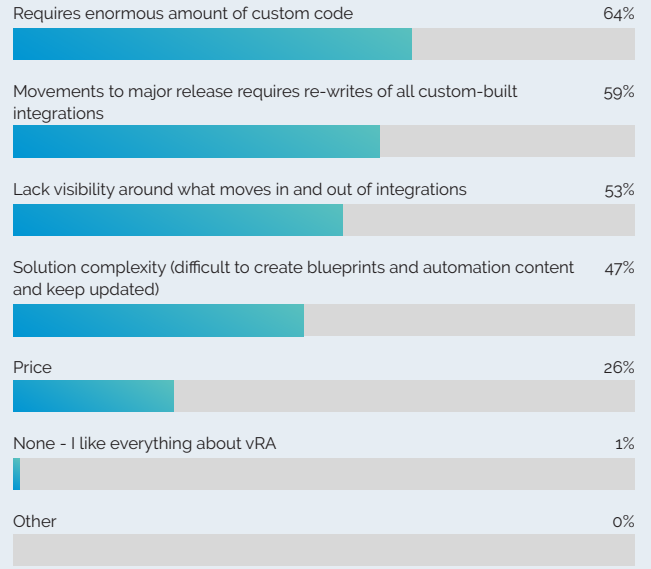
N = 200 technology leaders

3

What percent of custom-coded integrations have you built to enable vRA?

51% - 75%	55%
26% - 50%	33%
1% - 25%	8%
76% - 90%	3%
>90%	1%
0%	1%
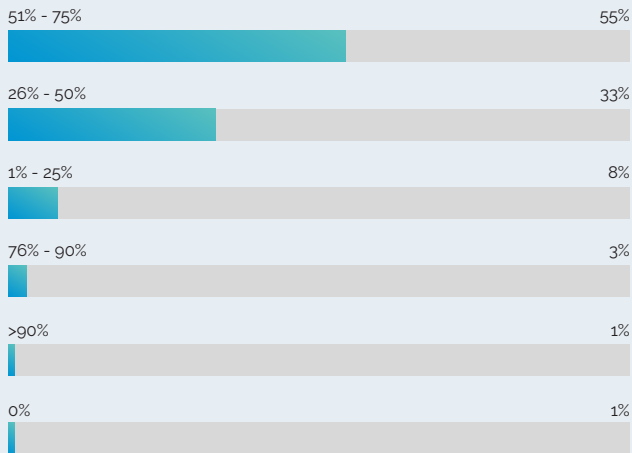
N = 200 technology leaders

4

Which of the following would improve your vRA experience? (Select all that apply)

Better ability to integrate multiple solutions and tools	68%
Deeper-level integrations	62%
Eliminate need for rewrite of integrations with each major vRA release	62%
Less need for custom coding	49%
More out-of-the-box integrations	40%
More expansive public cloud provisioning capabilities	23%
More cost-effective pricing options	9%
Other	0%

N = 200 technology leaders

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What is your vRA go-forward strategy

Remain on vRA 7 and add other complementary solutions to get the functionality I need (e.g., Terraform and/or Ansible) — 36%

Migrate to vRA 8 — 31%

Migrate to vRA 8 and add other complementary solutions to get the functionality I need (e.g., Terraform and/or Ansible) — 23%

Undecided — 6%

Remain on vRA 7 — 3%

Remain on vRA 8 — 2%

Replace vRA altogether with another cloud automation solution (e.g., Morpheus, CloudBolt, etc.) — 1%

N = 200 technology leaders

CloudBolt software **PULSE**

6

Why have you decided to replace your vRA altogether? (Select all that apply)

Pain of migrating to vRA 8 — 100%

Pressure from VMware to buy Enterprise to maintain current capabilities — 100%

End-of-Life (EOL) for vRA 7 — 0%

Limited features in vRA 8 Advanced — 0%

Other — 0%

N = 1 technology leader

CloudBolt software **PULSE**
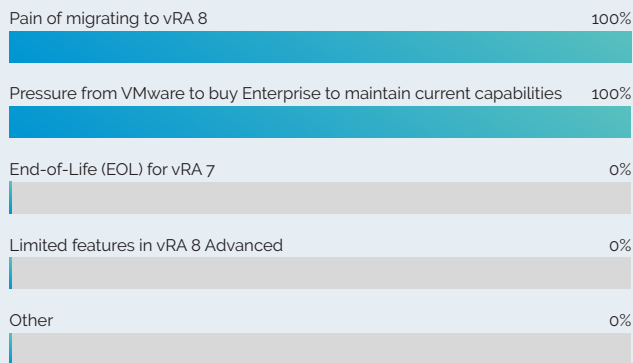
7

If you are currently on vRA 7, when do you plan to deploy vRA 8?

Q1 or Q2 of 2022 — 47%

Q3 or Q4 of 2021 — 32%

Q3 or Q4 of 2022 — 10%

Undecided — 9%

Already deployed — 2%

I will not be migrating to vRA 8 — 1%

N = 196 technology leaders

CloudBolt software **PULSE**
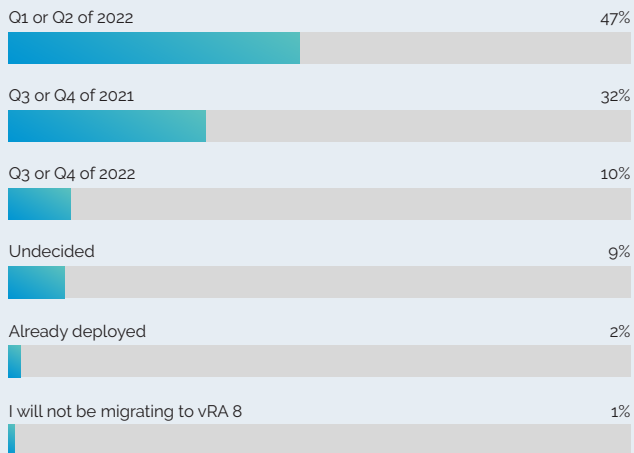
8

Are you using Terraform?

No, but we are considering Terraform instead of vRA — 32%

Yes, with vRA — 24%

No, but we want to evaluate Terraform — 19%

Yes, but without vRA — 16%

No, but different departments are using Terraform — 5%

No, we are not interested in Terraform at this time — 5%

N = 200 technology leaders

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Are you interested in integrating ServiceNow with vRA?

Yes, with CMDB (configuration management database) integration — 42%

Yes, with ServiceNow being the front end for vRA — 26%

Yes, with change control and approval integrations — 17%

No — 11%

Yes, with incident/ticketing integration — 5%

N = 200 technology leaders

CloudBolt software   **PULSE**
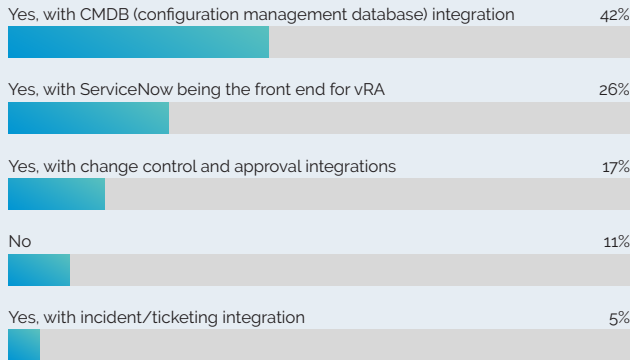
10

What is the most important ServiceNow catalog-based integration?
(Please rank most important to least important)

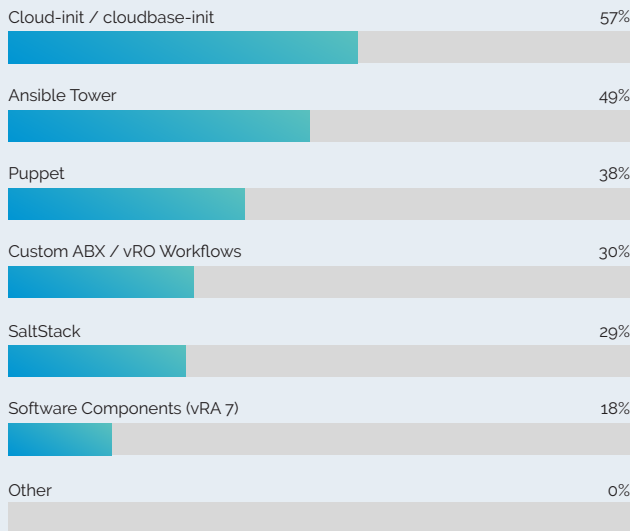Ability for ServiceNow team to customize catalog items, approvals, workflow, etc. — 20%

Ability to control input mappings from ServiceNow to vRA blueprints/catalog items — 19%

Ability to integrate ServiceNow with vRA Cloud Assembly — 17%

Replicating vRA UI in ServiceNow — 16%

Ability to integrate ServiceNow with vRA Service Broker — 15%

Ability to integrate with Terraform or Ansible directly — 13%

Other — 0%

N = 179 technology leaders

CloudBolt software   **PULSE**

11

How are you currently handling application provisioning with vRA?
(Select all that apply)

Cloud-init / cloudbase-init — 57%

Ansible Tower — 49%

Puppet — 38%

Custom ABX / vRO Workflows — 30%

SaltStack — 29%

Software Components (vRA 7) — 18%

Other — 0%

N = 200 technology leaders

CloudBolt software   **PULSE**

CloudBolt software

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