

The 2025 DevOps Migration Index

The Platform Migration Mirage:
Massive Spend, Limited Returns

Enterprise platform migrations have become a multi-billion-dollar industry built on promises of streamlined operations and reduced costs. New research shows these "big bang" transformations consistently underdeliver, drain budgets, and stall innovation.

This report examines why traditional migration strategies are failing and explores the alternatives leading enterprises are adopting instead.

Table of Contents

- 01 Executive Summary
- 03 Key Findings
- 10 The Migration Mirage:
ROI That Never Materializes
- 19 The Human Cost of Transformation:
Burnout and Lost Momentum
- 24 In an AI-First Enterprise, Migration
Widens Governance Gaps
- 29 Integration Outperforms Migration

Executive Summary

For years, enterprise technology leaders have been sold a seductive narrative: Migrate to a modern DevOps platform, consolidate your toolchain, and watch complexity disappear along with your costs. The short-term pain of migration will give way to long-term operational gains, streamlined workflows, and happier developers.

New research tells a different story. Platform migrations aren't delivering promised returns, and enterprises achieve better outcomes through strategic modernization rather than disruptive replacement.

Based on a survey of over 300 enterprise IT and DevOps leaders conducted by independent research agency TrendCandy, **57% spent over \$1 million on platform migrations in the past year alone, and 77% of migration projects exceeded budgets by more than 10%.**

More than one-third of organizations (37%) saw at least a quarter of their migration investment deliver no lasting business value—money simply lost to failed implementations and abandoned approaches.

The implications extend far beyond budget overruns. Migration disruptions led 60% of organizations to miss revenue opportunities due to delayed product releases and extended sales cycles, while 75% found that migration made maintaining security integrations harder than before.

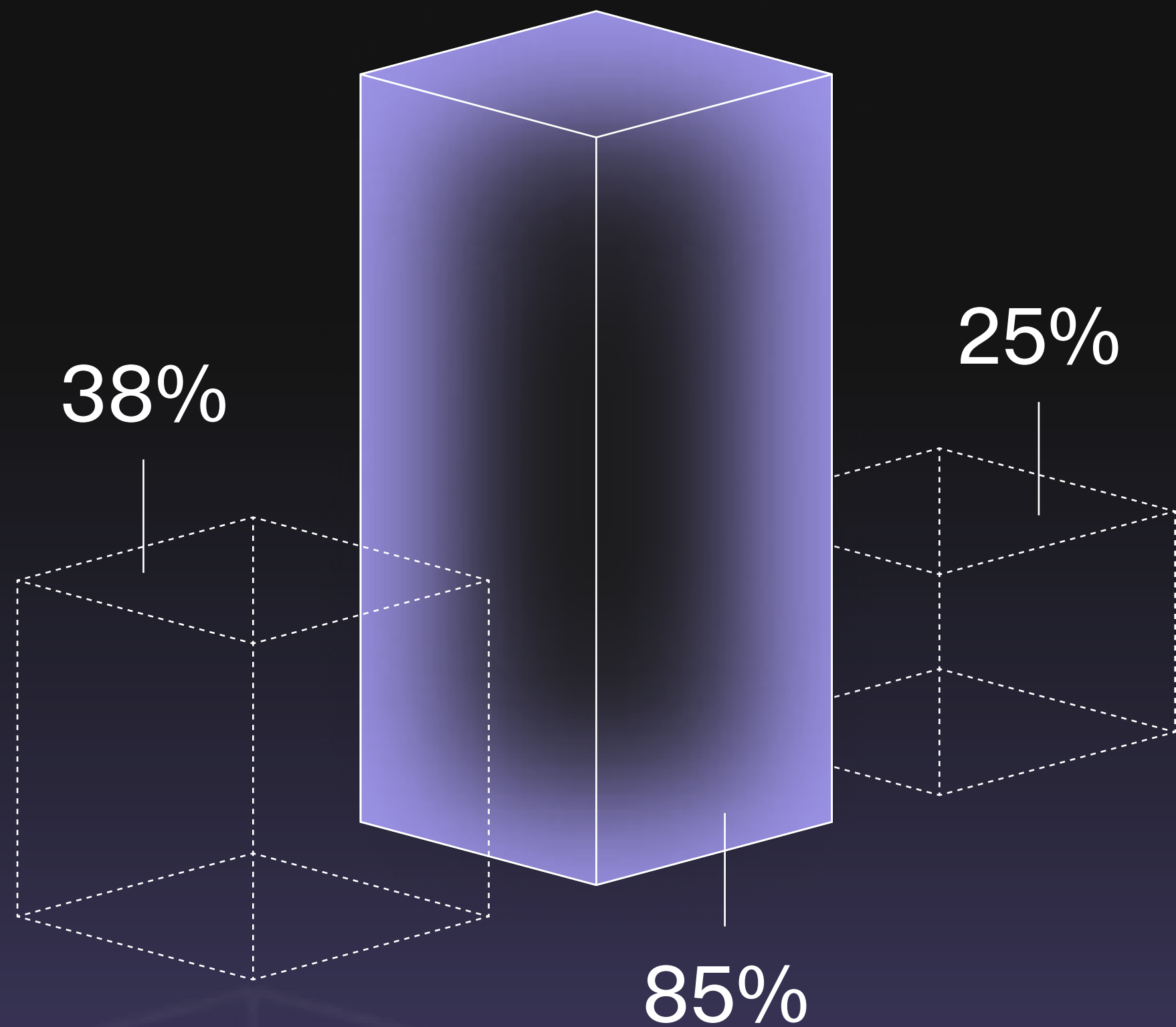
As organizations accelerate AI adoption and face mounting pressure to innovate faster, understanding why traditional migrations fail and what alternatives exist has never been more important.

Enterprises face a critical choice. Do they lock resources into disruptive platform migrations that take months to complete, or invest those same resources in the AI capabilities that are redefining competitive advantage?

Leading enterprise technology leaders are discovering an alternative path forward: modernization without migration.

Research found that 92% of organizations achieve greater delivery efficiency by integrating tools rather than replacing them, proving that strategic integration approaches deliver the governance, security, and innovation benefits that migration promises—without the hefty costs, disruption, and security concerns.

Key Findings



ROI Falls Short

85% of enterprises completed platform migrations in the past two years, yet only 25% reported achieving expected value within a year, and 38% said their migrations delivered less ROI than promised.

Key Findings

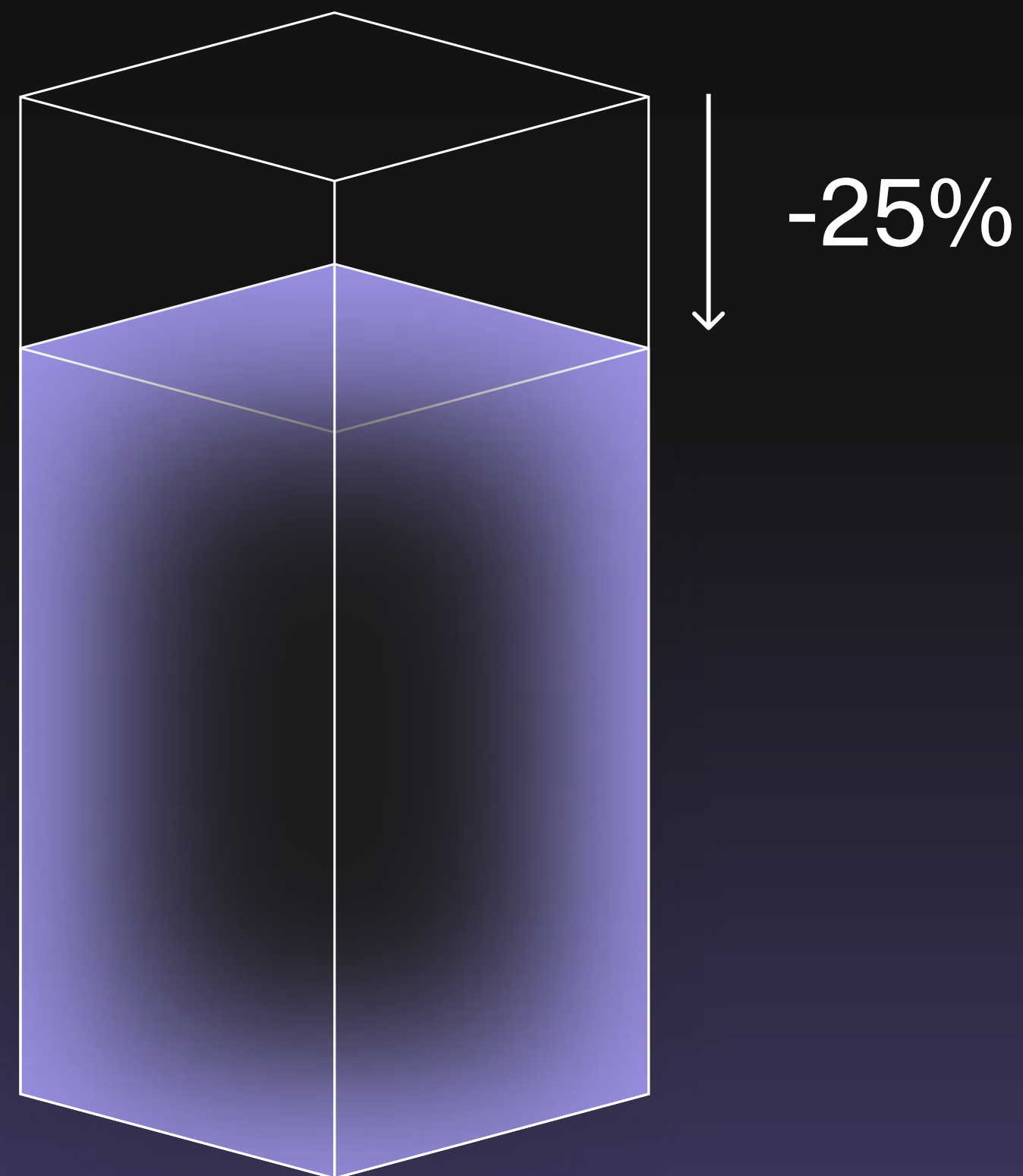


\$315k
over budget

Financial Waste

57% of enterprises spent over \$1 million on migrations last year, with average projects costing \$1.75M and running 18% over budget — an average cost overrun of \$315K per enterprise.

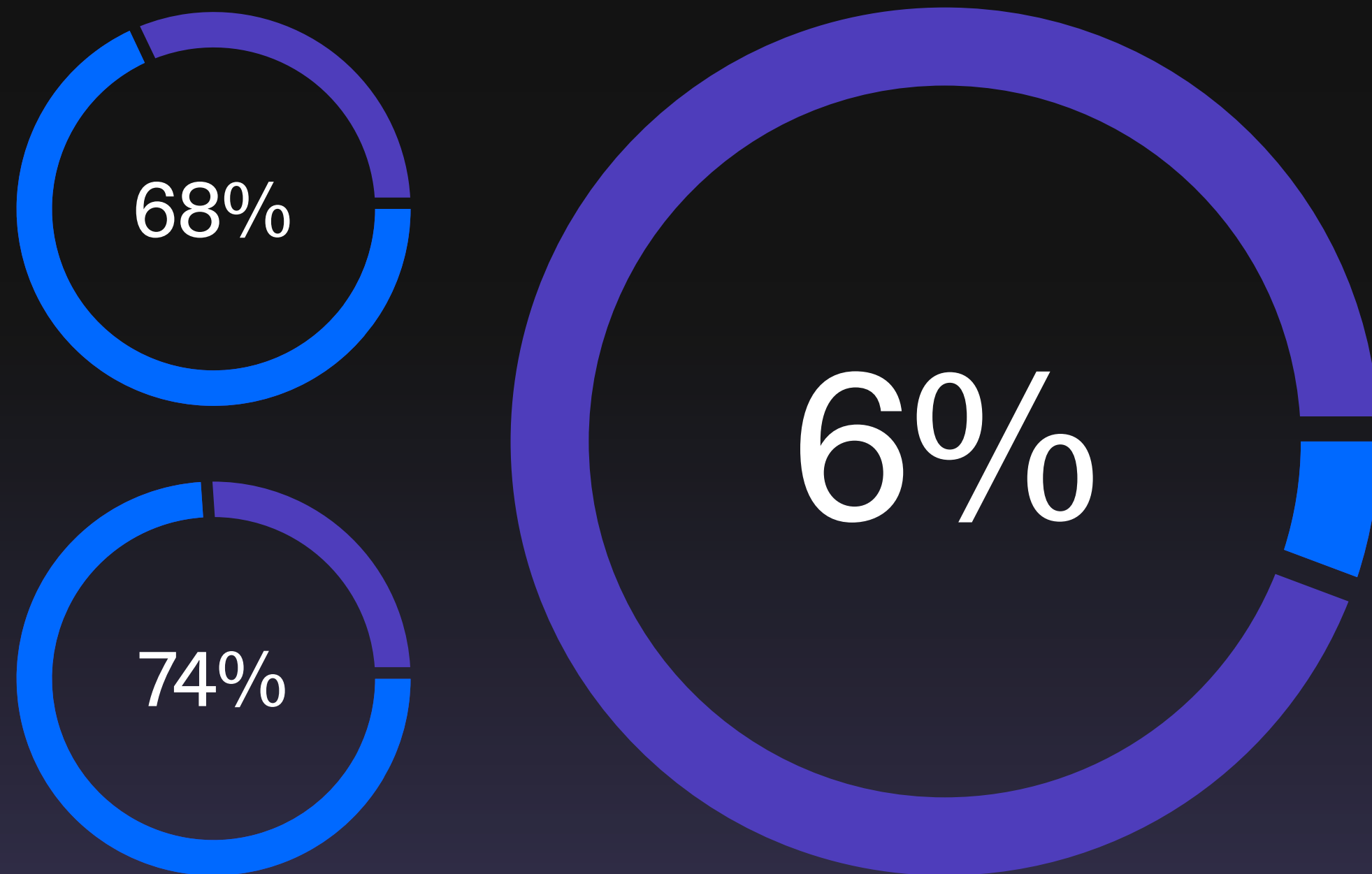
Key Findings



Sunk Costs, Limited Impact

37% of organizations lost more than 25% of their migration budgets to failed or abandoned initiatives that delivered no lasting business impact.

Key Findings



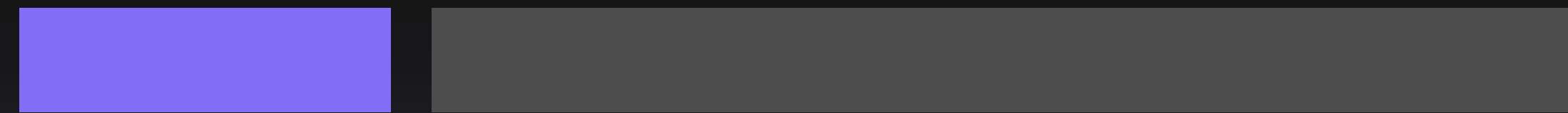
Operational Strain

68% of IT leaders said tool consolidation reduced productivity, and 74% reported more tool sprawl post-migration. Only 6% saw any improvement in mean time to resolution (MTTR).

Key Findings



Increased developer burnout - 70%



Reported high developer morale - 24%



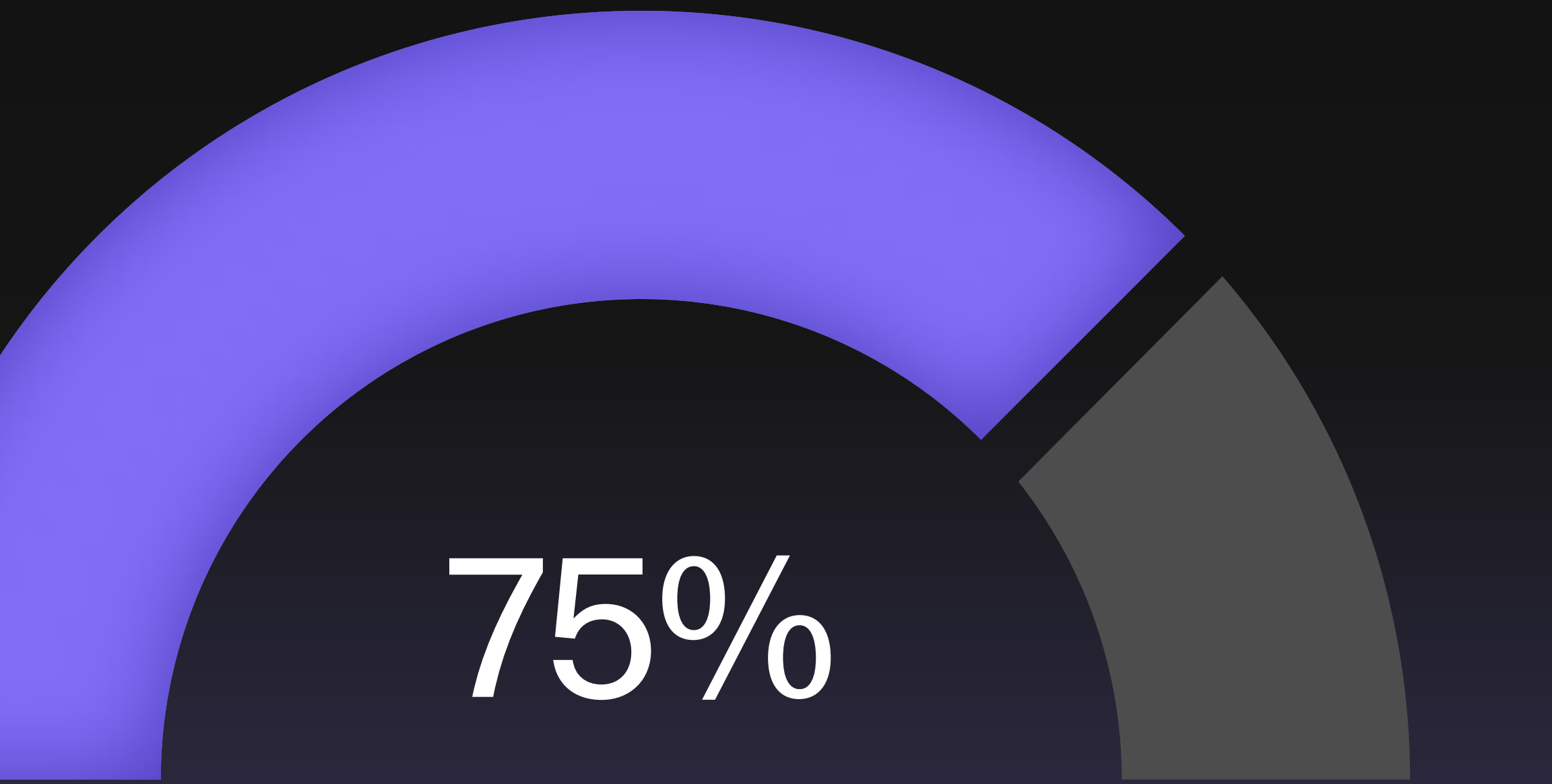
Delayed new initiatives by over six months - 61%



Human Cost

70% of enterprises reported increased developer burnout, and just 24% said developer morale remained high during migration. 61% of teams delayed new initiatives for over six months after completion.

Key Findings



Security Setbacks

75% of organizations found it harder to maintain security integrations post-migration, while 40% discovered new security blind spots in their replatformed environments.

Key Findings



Integration Wins

92% of enterprises achieved greater delivery efficiency by integrating tools instead of replacing them—proving that modernization without migration delivers results faster, safer, and at lower cost.

The Migration Mirage

ROI That Never Materializes

Despite multi-million-dollar investments, the survey found that 38% of migrations delivered less ROI than originally promised to executive sponsors and boards.

Migrations typically follow a "rip and replace" model: Organizations dismantle their existing CI/CD tools and workflows, migrate everything to a single platform, and rebuild their integrations and processes from the ground up.

This means shutting down Jenkins servers, GitLab instances, or other build systems that teams have used for years. Teams must export data and configurations, then recreate workflows in an entirely new environment.

They rebuild automated processes, recreate integrations with testing tools and security scanners, and retrain developers on new workflows. All of this happens while maintaining production systems and meeting delivery deadlines.

The business case for DevOps platform migrations builds on real pain points: legacy infrastructure that limits agility, tool sprawl that creates maintenance burdens, siloed data that creates operational blind spots, and fragile integrations that break under pressure.

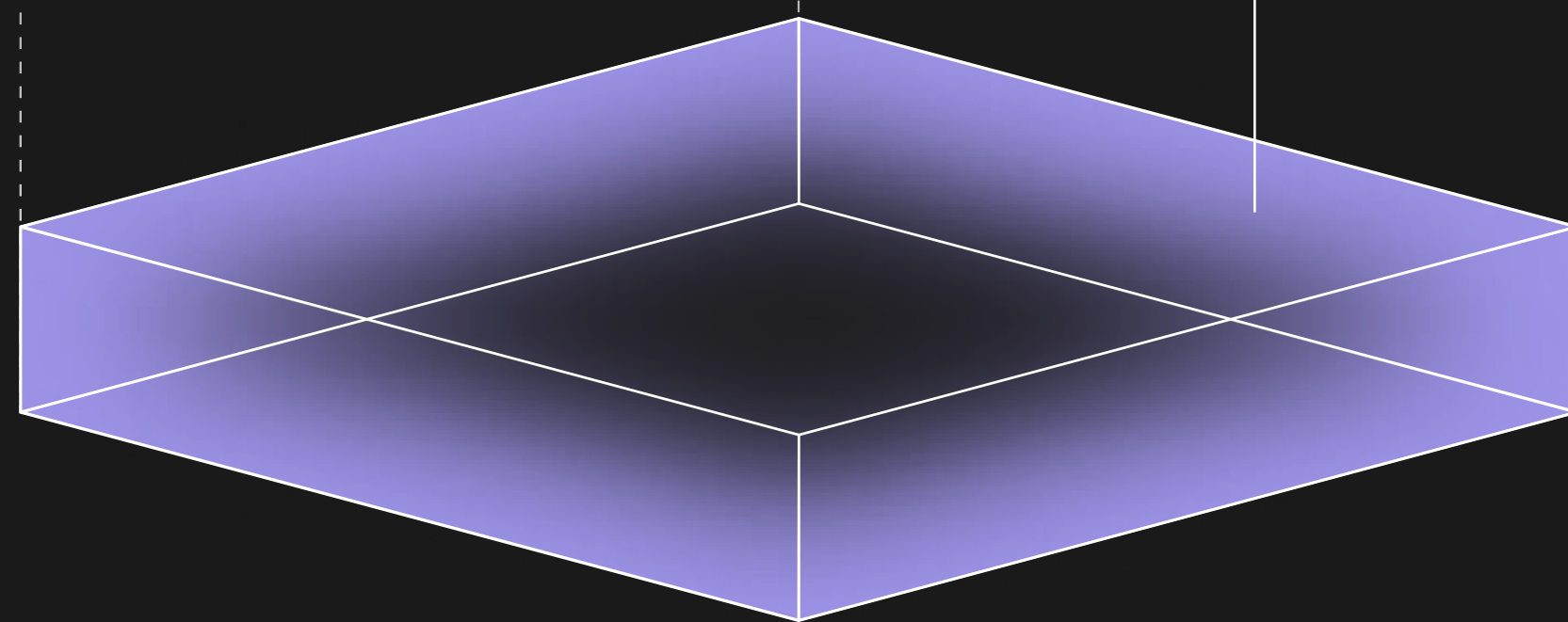
Leadership teams are promised clear, quantifiable benefits:

- Reduced operational overhead
- Faster deployment cycles
- Improved developer productivity
- Consolidated vendor relationships

Executive sponsors present compelling ROI projections. Consultants promise faster time-to-market, reduced tooling costs, and streamlined operations. But the data reveals a stark disconnect.

Operational Promises Fall Short

Only 6% of enterprises saw improvement in MTTR



Platform migrations promise operational transformation but deliver operational disappointment. While 85% of enterprises have conducted migrations in the past two years, these massive investments consistently fail to deliver the promised operational benefits.

Even though improving mean time to resolution (MTTR) is a core justification for platform consolidation, only 6% of enterprises saw improvement in MTTR post-migration.

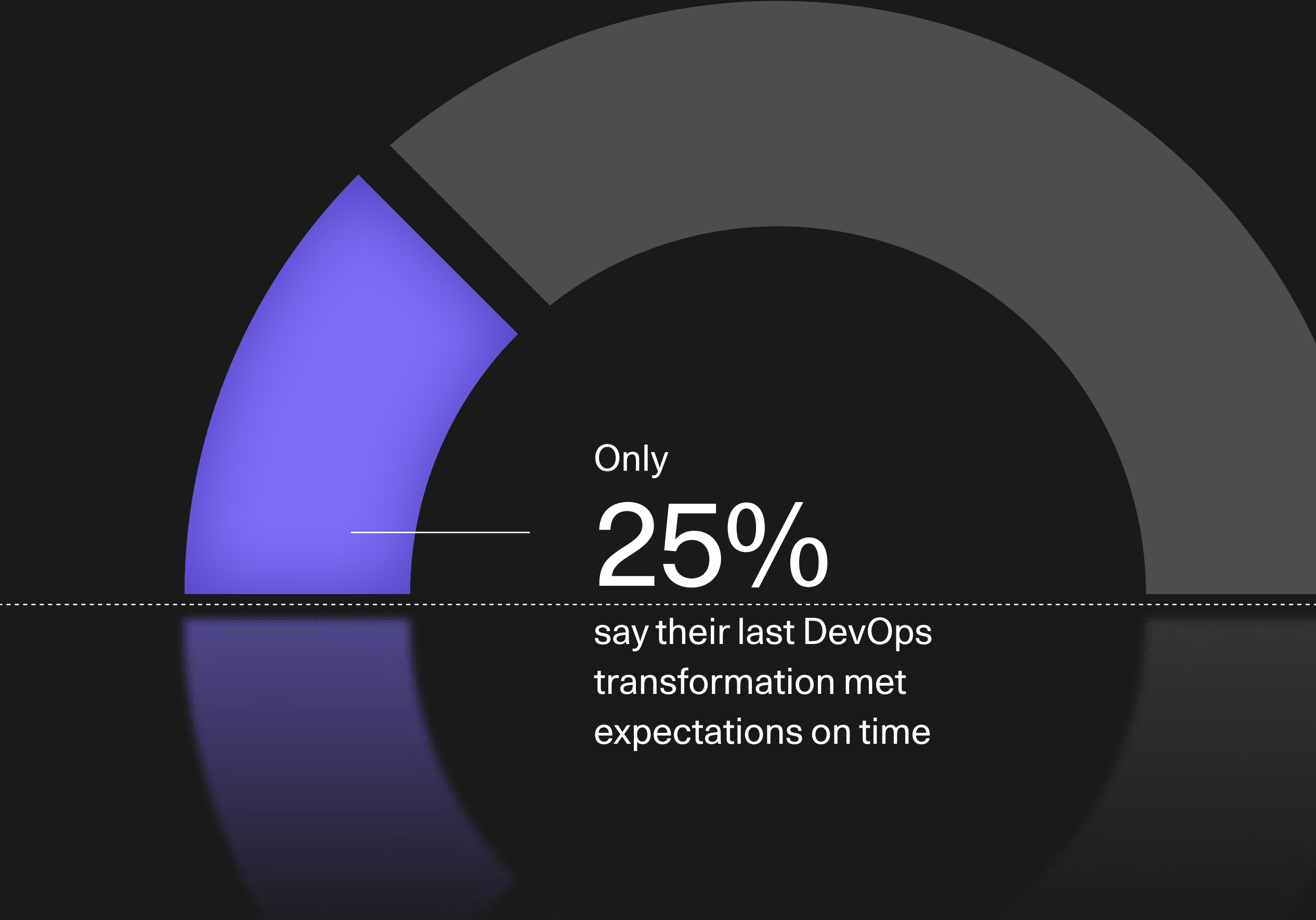
Similarly, only 21% saw reduced delivery cycle times—another frequently cited advantage that fails to materialize for most organizations. And 75% missed their time-to-value targets entirely.

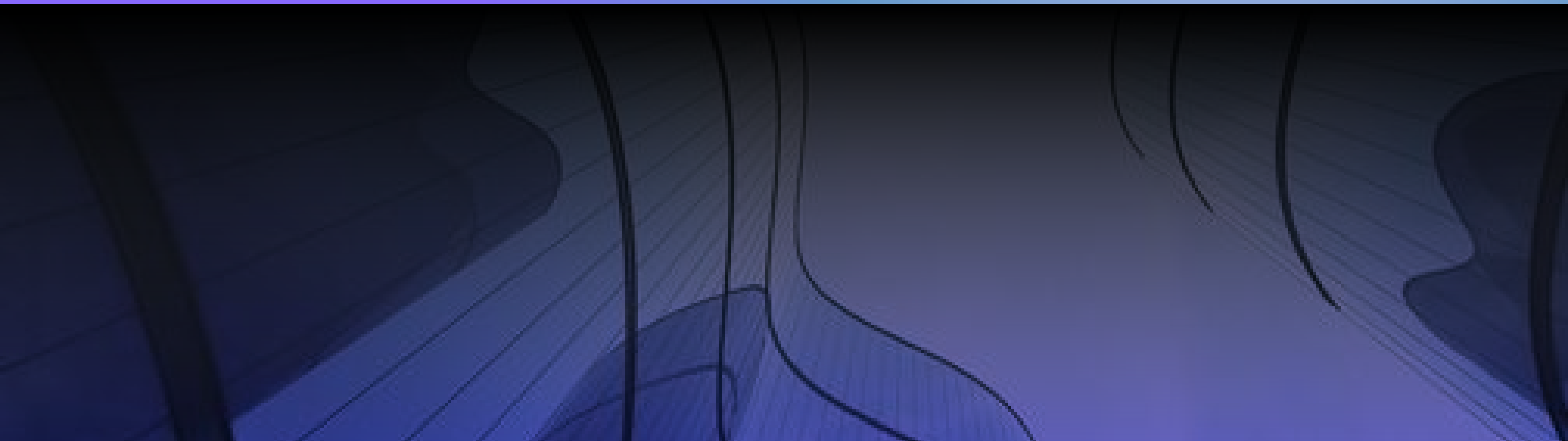
Initiatives designed to enhance agility are creating the opposite—more disruption, reduced output, and escalating costs.

Value Arrives Late, or Not at All

Beyond operational failures, the timeline to value rarely matches what vendors and consultants promise. Only 25% of organizations report that their transformation delivered expected value within a year. The remaining 75% faced extended timelines before seeing returns, if they saw them at all.

Even more concerning, only 25% of DevOps leaders say their last DevOps transformation met expectations on time. Most faced delays, scope changes, or compromised outcomes, likely requiring difficult conversations with executive stakeholders.





37% of enterprises report that more than 25% of their migration budgets have become sunk costs with no lasting business impact. This is capital consumed by dead-end approaches, abandoned integrations, and work that had to be redone.

57% of enterprises spent over \$1 million on migrations last year. With 25% of that amount becoming sunk costs, that means hundreds of thousands of dollars were spent on work that delivered no enduring value.

The Workflow Disruption No One Plans For



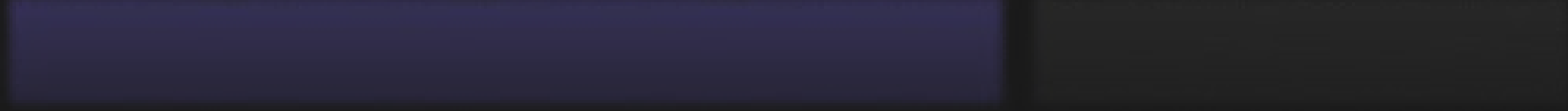
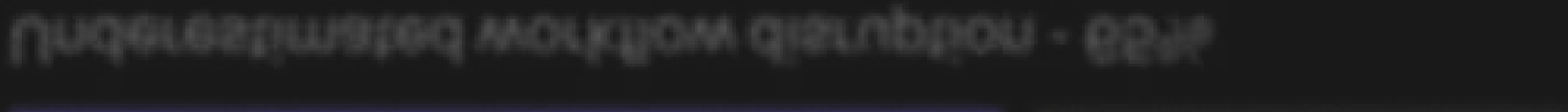
Tool consolidation reduced productivity - 68%



Reported more tool sprawl after migration - 74%



Underestimated workflow disruption - 65%



Rip-and-replace migration is an expensive way to make productivity even worse than it was before you started. When migration efforts fail to deliver promised benefits, organizations are often stuck with ongoing costs that compound the problem.

68% of IT leaders believe consolidating tools actually reduced productivity, while 74% of organizations report experiencing more tool sprawl after migration. Meanwhile, 65% of DevOps leaders admit they underestimated the workflow disruption of replatforming.

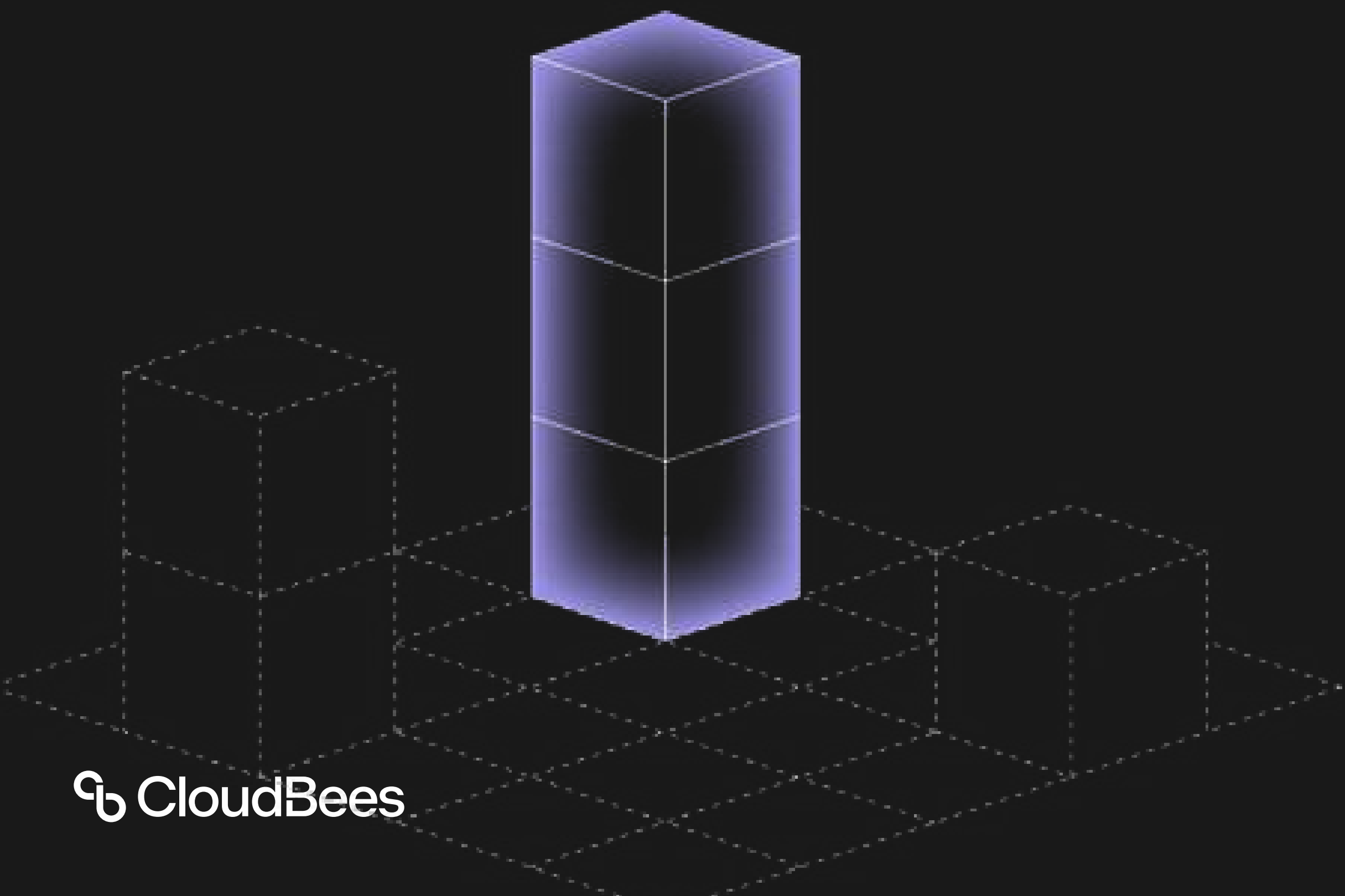
The root cause is that migration plans focus heavily on technical compatibility but undervalue the equally vital human and process dimensions. Organizations essentially put all their eggs in one basket, only to discover the basket has holes. Teams respond by adding point solutions, shadow IT, and workarounds, recreating the very complexity they sought to eliminate.

The strategic inflexibility becomes even more problematic in rapidly evolving technology landscapes. 85% of DevOps leaders report that platform lock-in remains a top concern even after migration—a concern that becomes existential in the context of AI adoption.

With AI capabilities evolving at an unprecedented speed, enterprises locked into platforms with limited AI integrations find themselves unable to adopt best-of-breed tools as they emerge.

Rather than eliminating tool sprawl, migration simply creates a more expensive, more complex version of it, with the added burden of platform licensing costs and integration overhead. This proves that rip-and-replace migration doesn't even solve the current point-in-time problem, let alone future-proof against inevitable changes.

The Migration Money Pit: Measuring Business Value Lost



Migration complexity is turning digital transformation into a costly detour, draining the budget and engineering focus enterprises need to innovate in an AI-driven era.

The financial case for migration collapses under scrutiny. Migrations exceeded budget by an average of 46%, and 38% delivered less ROI than originally promised to executive sponsors and boards.

When overruns and ROI failures are this consistent, they suggest systematic underestimation of the true cost and complexity of platform transitions at enterprise scale.

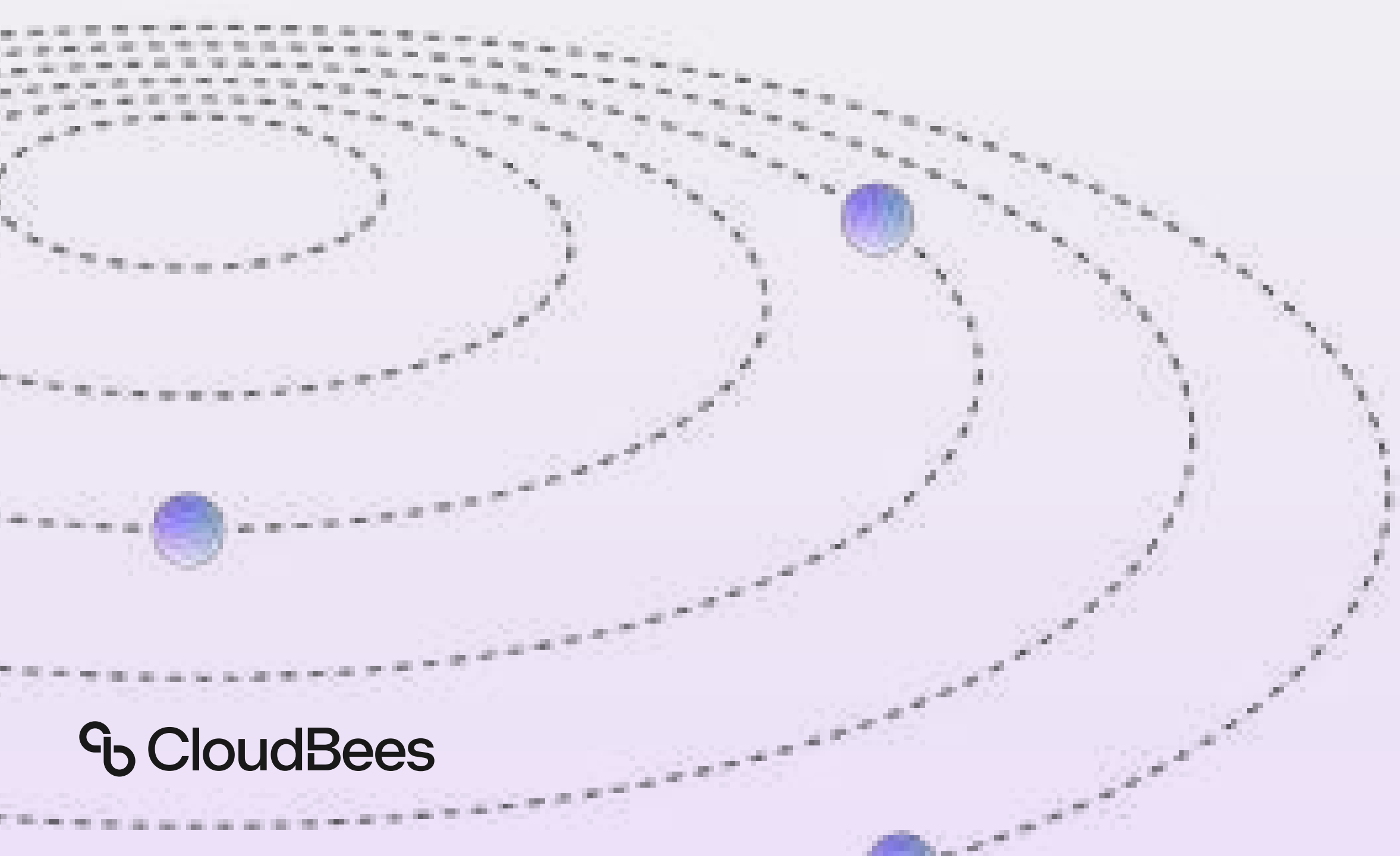
The most damaging costs may be the ones that never appear in project budgets. Around 60% of migrations triggered missed revenue opportunities, likely including:

- Postponed product releases that could have generated revenue
- Longer sales cycles as engineering resources were diverted to migration work
- Delayed market entries that may have allowed competitors to establish position
- Deferred customer feature requests that could have accelerated expansion

For leaders evaluating transformation ROI, these hidden costs—the innovations not built, the markets not entered, the customers not won—may exceed the direct migration expenses that appear on project budgets.

The Human Cost of Transformation

Burnout and Lost Momentum



Platform migrations burn out development teams and create productivity losses that directly impact business velocity and competitive advantage. The ripple effects extend far beyond IT departments to fundamental business outcomes like time-to-market, innovation capacity, and talent retention.

Technology migrations are often framed in terms of systems, architectures, and operational metrics. But ultimately, DevOps platforms exist to serve one primary community: developers.

And when migrations disrupt developer productivity, the impact cascades directly to an organization's ability to deliver value to customers.

Migration Disrupts Immediate Performance

Platform migrations create an immediate productivity crisis that undermines customer delivery and competitive positioning.

Less than one quarter (24%) of organizations reported very high developer morale during platform migration, as teams struggle to simultaneously maintain production systems while learning new tools and meeting unchanged delivery expectations.



This disruption creates immediate business risks:

Product quality suffers

Overextended teams cut corners on code review and testing, leading to more bugs reaching customers.

Security vulnerabilities increase

Burned-out developers overlook critical security practices, exposing the organization to breaches.

Innovation stalls

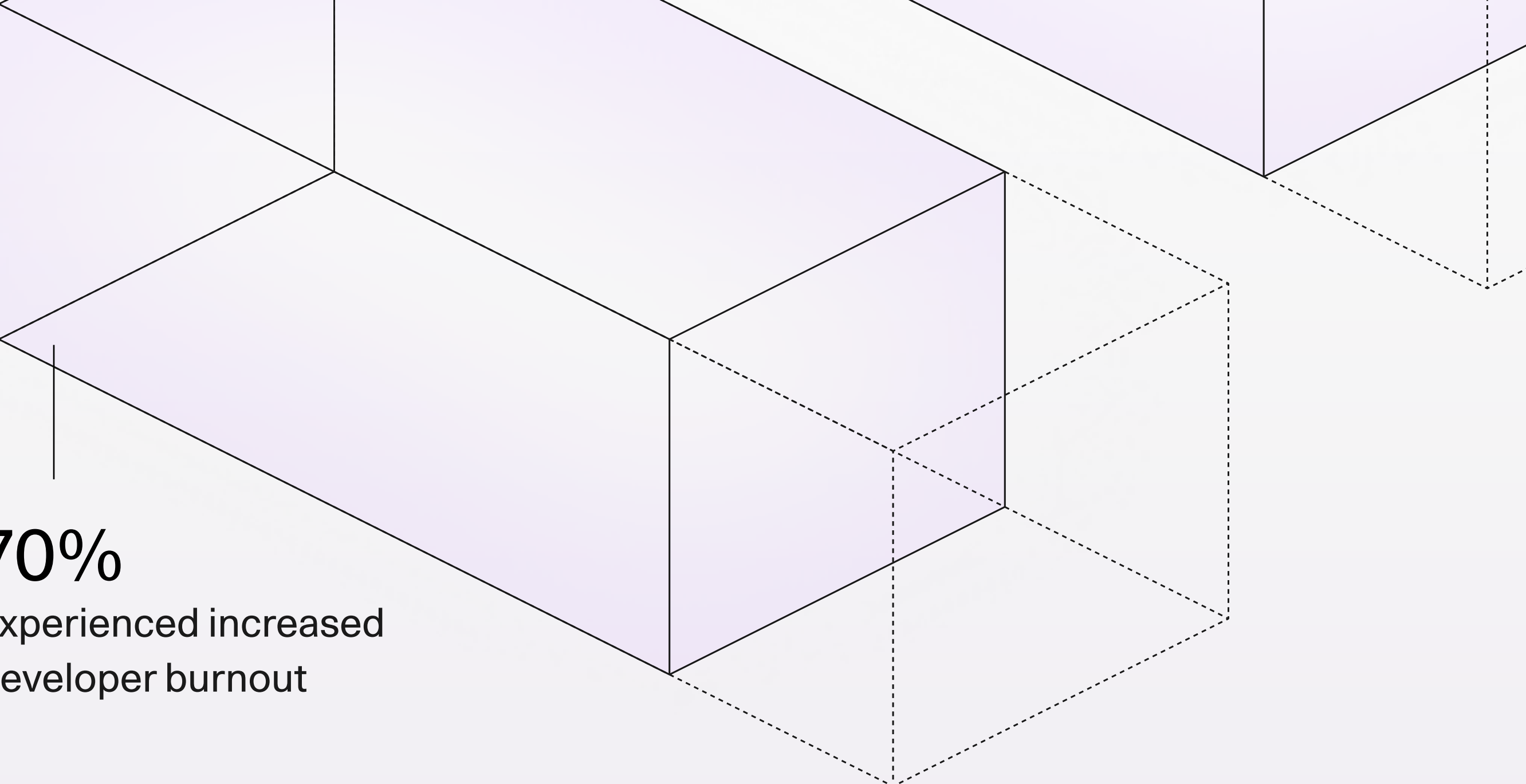
Teams focused on migration survival have no bandwidth for the strategic initiatives that drive competitive advantage.

Customer experience degrades

Slower feature delivery and quality issues directly impact customer satisfaction and retention.

When developers' focus shifts from innovation to migration survival, the psychological toll of imposed platform decisions compounds technical challenges, creating a perfect storm for decreased performance exactly when organizations need peak execution.

Burnout Creates Long-Term Business Risk



70%
experienced increased
developer burnout

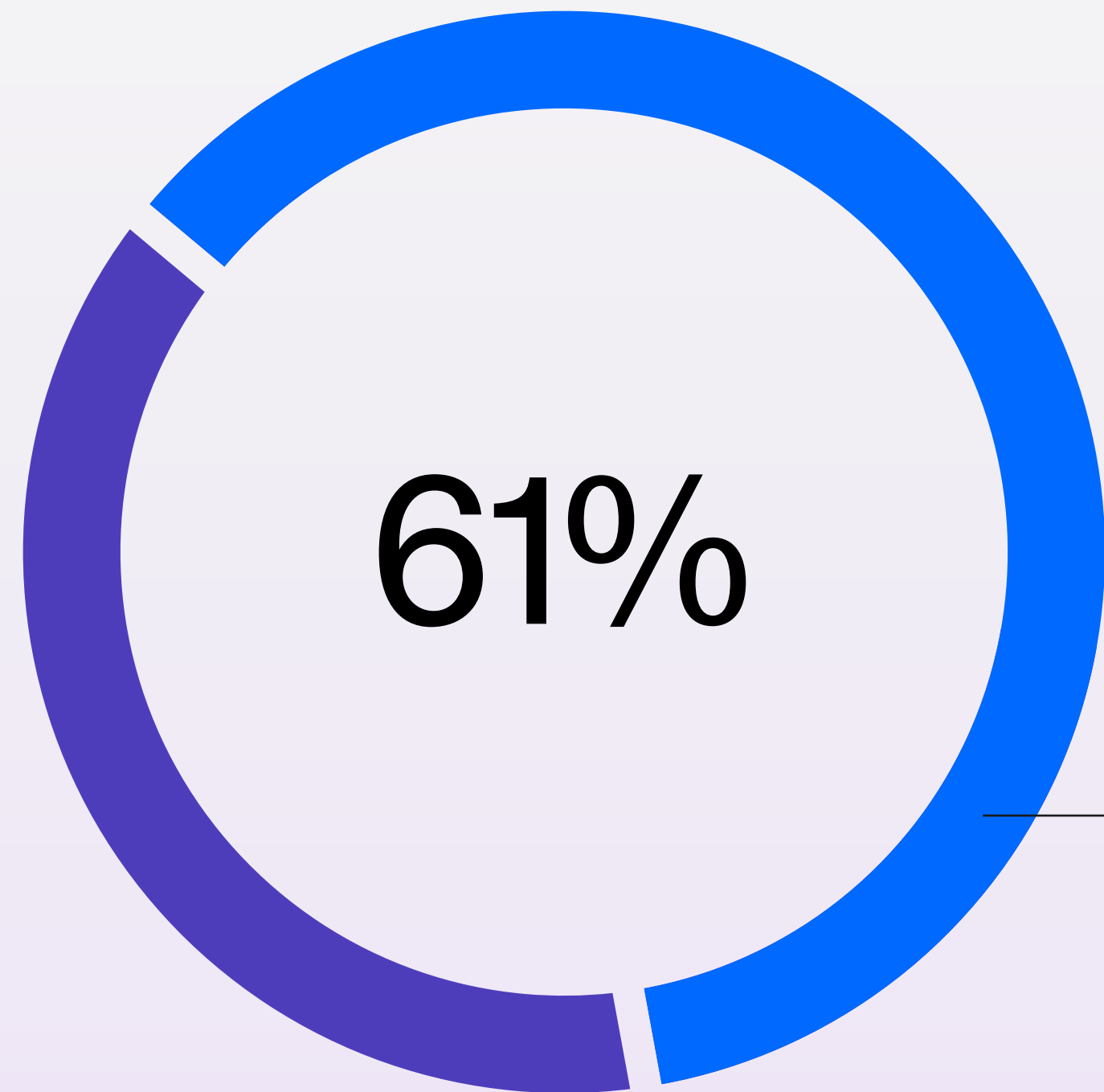
The developer burnout epidemic triggered by platform migrations poses serious threats to product security, quality, and market competitiveness.

70% of enterprises experienced increased developer burnout during platform transitions, leading to compromised code review practices, overlooked security vulnerabilities, and talent flight to competitors.

In a competitive DevOps talent market, replacing experienced engineers costs organizations months of productivity and significant recruitment expenses.

Meanwhile, demoralized teams resist full platform adoption, extending migration timelines and multiplying business disruption.

Innovation Freeze Erodes Competitive Advantage



61% of DevOps leaders report that migration fatigue led their teams to avoid new initiatives for over six months following a platform transition

Migration fatigue creates an innovation paralysis that can permanently damage market position. 61% of DevOps leaders report that migration fatigue led their teams to avoid new initiatives for over six months following a platform transition—a devastating blow in fast-moving software markets where competitive advantage depends on continuous innovation.

After months of migration intensity, teams need recovery time that competitive dynamics rarely accommodate.

Organizations essentially trade their innovation capacity for platform consolidation, emerging from migration with less ability to respond to market opportunities than when they started.

In an AI-First Enterprise, Migration Widens Governance Gaps

Platform migrations are systematically weakening security controls precisely when AI adoption requires the strongest governance frameworks enterprises have ever implemented.

AI-powered code generation, automated testing, intelligent deployment optimization, and predictive analytics are becoming table stakes for competitive software delivery.

But AI adoption also increases security and governance risks, and platform migrations are making these risks worse.


Enterprises face a dangerous timing mismatch: 70% allow business leaders to deploy AI tools without security review, while 75% find maintaining security integrations harder after migration.


The AI Governance Paradox


The enthusiasm surrounding AI's potential is outpacing the security and compliance frameworks necessary to manage AI at enterprise scale.


While 72% of survey respondents cited data privacy and compliance as the biggest risk of AI-based DevOps tools, the data shows that organizations continue to deploy them without proper oversight.

This creates a dangerous gap between AI adoption velocity and governance maturity:


Tools get deployed for their promised productivity gains without proper vetting.

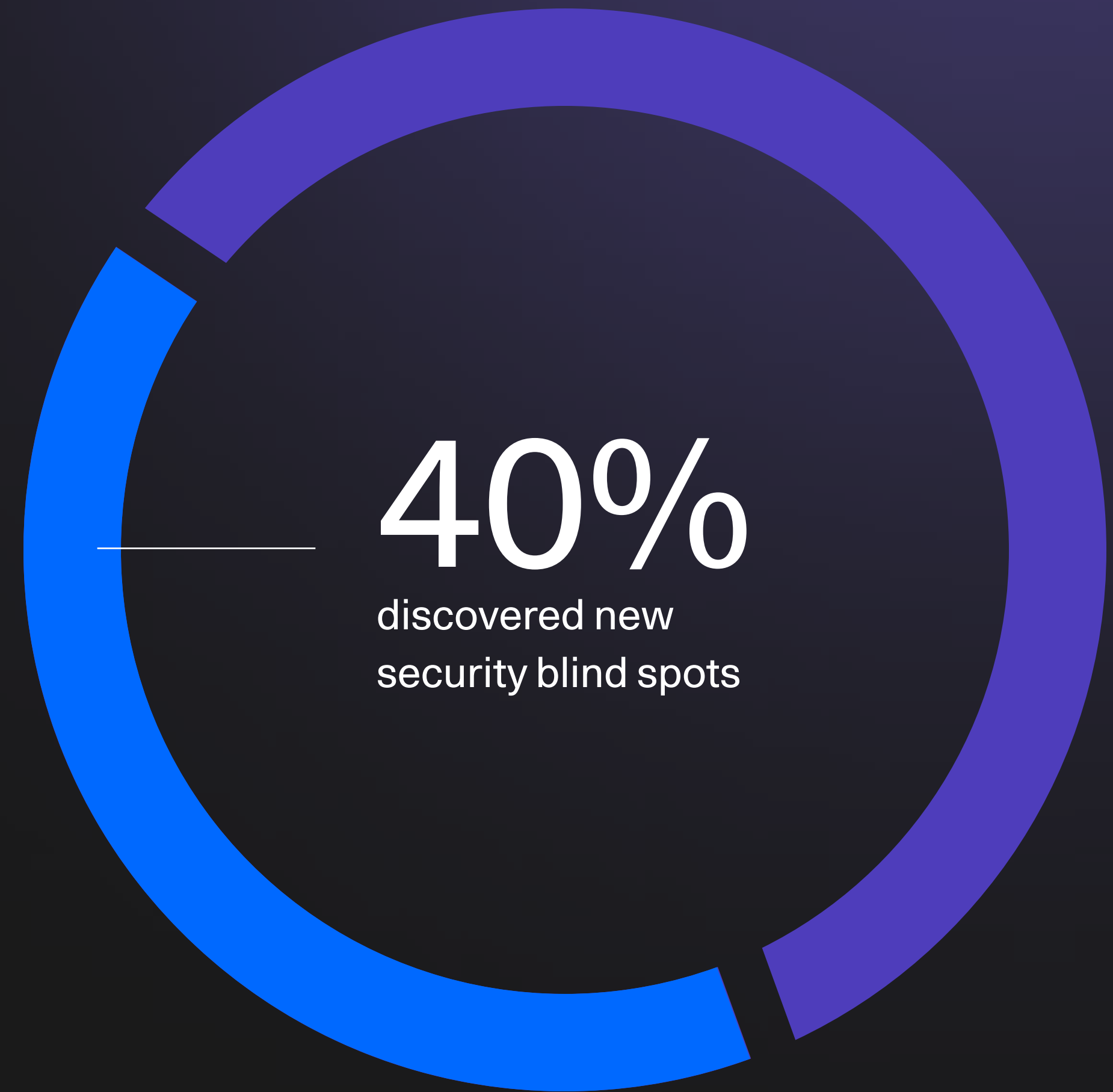

Security reviews happen after deployment, if at all.


Compliance implications are discovered in audits rather than addressed proactively.


Risks accumulate silently until they manifest as data leaks, regulatory violations, or security incidents.

Migrations Weaken Security When It Matters Most

Migration-induced security gaps create serious reputational and financial risks, damaging customer trust and exposing organizations to costly breaches. 40% of organizations discovered new security blind spots post-migration, as the security posture they carefully built over years gets disrupted during platform transitions.

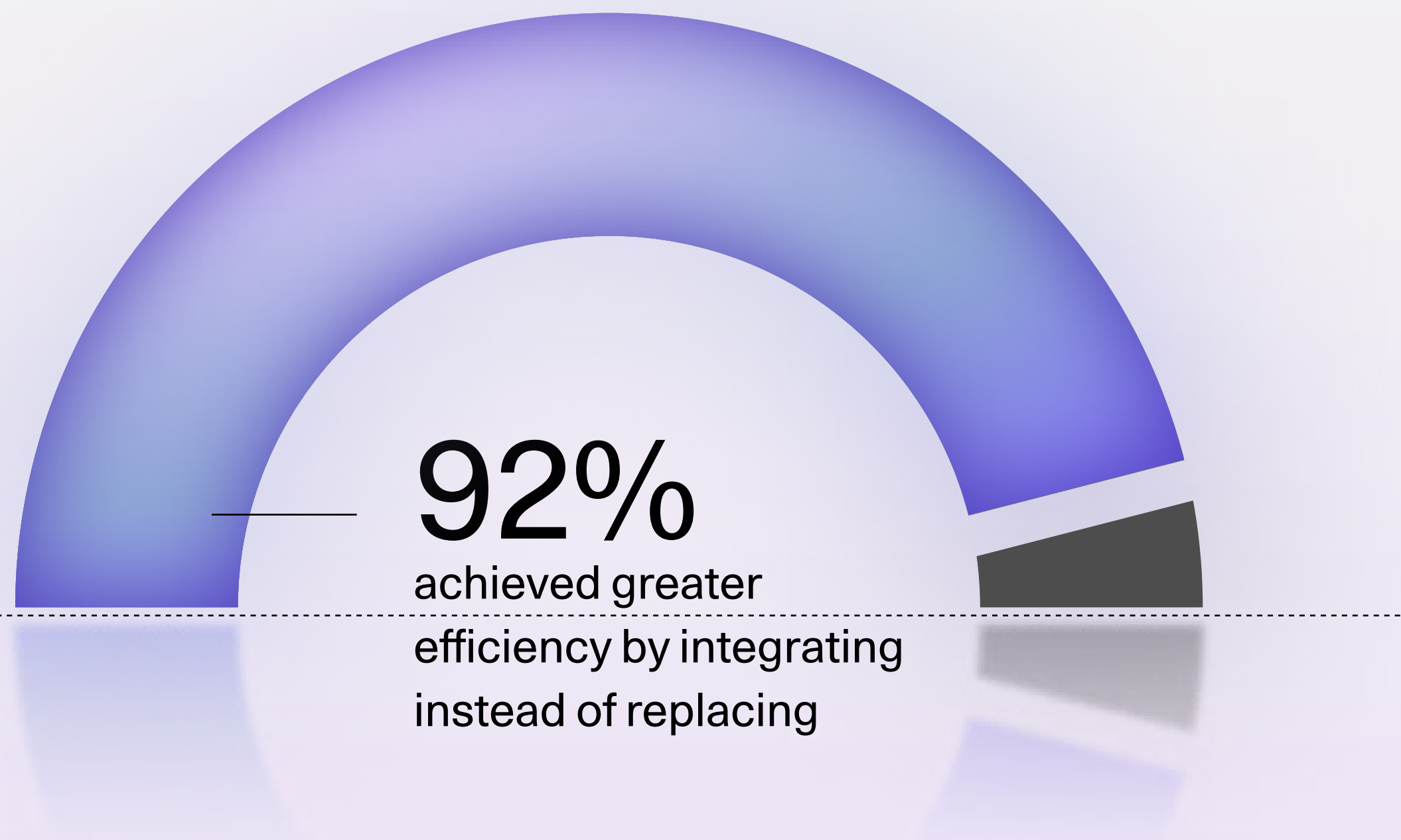




Access controls need reconfiguring. Monitoring tools lose visibility. Compliance audits reveal gaps that weren't there before migration.

Now, layer in AI adoption—in an unfamiliar new environment. Teams are deploying AI tools that process sensitive code, customer data, and proprietary algorithms, often without proper security review, in environments that they no longer fully understand. AI-related data leaks and compliance violations can have massive reputational and regulatory consequences.

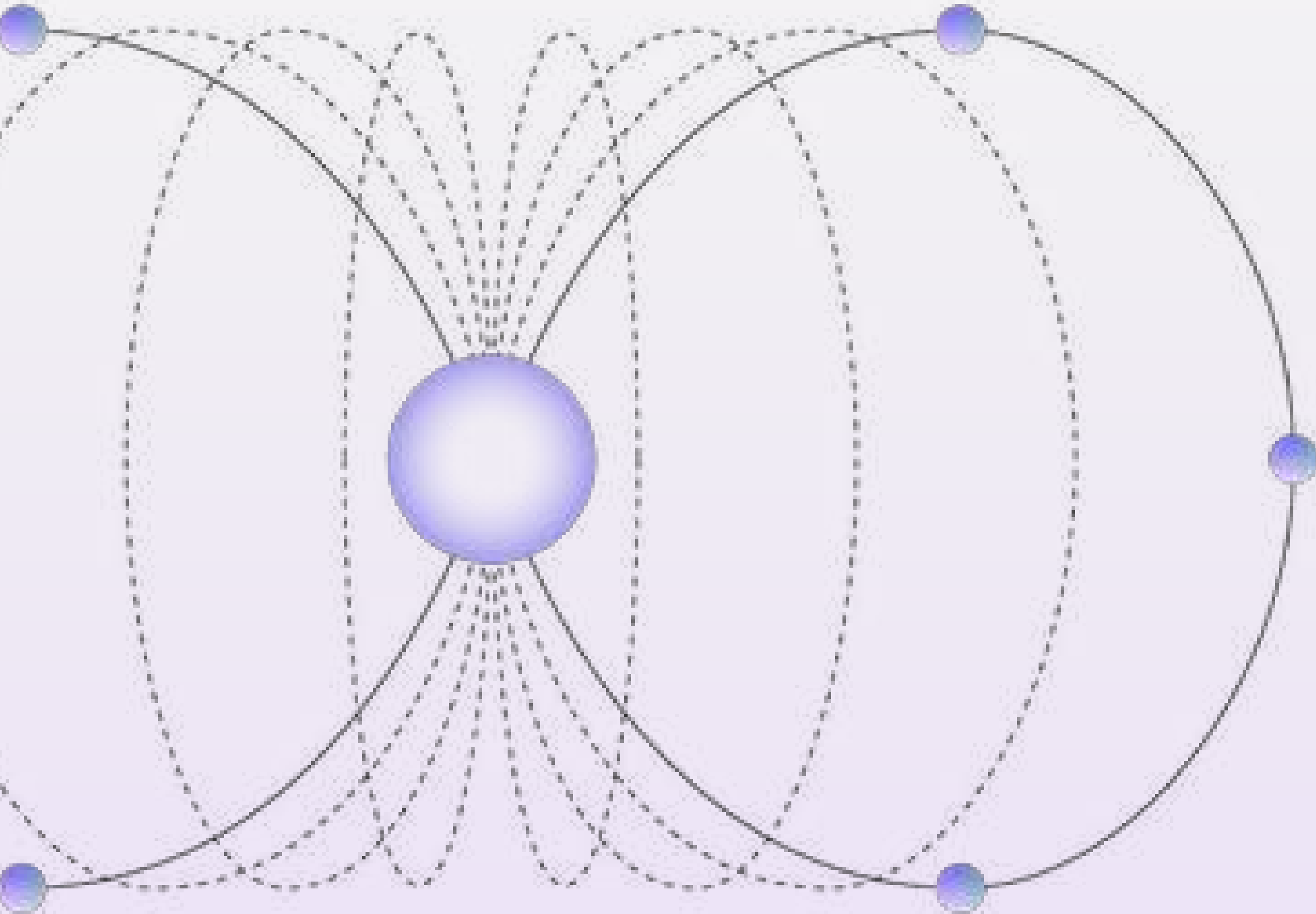
Integration Outperforms Migration



92% of organizations surveyed report achieving greater delivery efficiency by integrating tools rather than replacing them.

The data proves that while migrations consistently underdeliver, integration approaches actually deliver the promised benefits without the typical costs and disruption.

The Integration-First Advantage



The survey results span industries, company sizes, and technical architectures, revealing that integration strategies address something fundamental that consolidation approaches miss: they work with organizational reality rather than against it.

Integration-first modernization means creating a unified control plane that orchestrates across existing tools and systems, providing centralized visibility and governance without forcing teams to abandon their preferred platforms. Rather than replacing functional tools, this approach enhances them with better analytics, security, and coordination.



Here's what integration-first means in practice:

- **Instead of forcing all teams onto a single platform,**

you create a unified control plane that orchestrates across diverse tools, providing visibility and governance without mandating uniformity.

- **Instead of disrupting workflows,**

you enhance them with better analytics, security, and coordination, adding value immediately rather than extracting productivity during long transition periods.

- **Instead of migrating everything at once,**

you establish observability and governance over existing systems, then modernize incrementally based on business value and team readiness.

- **Instead of replacing tools teams rely on,**

you integrate them into a coherent ecosystem where data flows seamlessly, policies apply consistently, and leadership gains the visibility they need.

DevOps leaders are learning from experience that big-bang replacement creates more problems than it solves:

92%

prioritize modernization paths that avoid platform disruption.

92%

report that progressive adoption provided better governance than consolidation.

84%

found real-time analytics easier to adopt without replatforming.

The case for integration-first modernization is also financial. Migrations consistently drain capital through overruns, sunk costs, and missed opportunities. Integration flips that equation, preserving productivity and momentum while unlocking incremental modernization gains.

And just as important, integration lays the foundation for the future. As AI adoption accelerates and fragments toolchains, organizations need flexibility, not lock-in. With a centralized control plane, enterprises can bring new AI tools online quickly, govern them consistently, and evolve their environments without the downtime and disruption of replatforming.

Addressing the Skeptics

Some technology leaders worry that integration-first approaches will perpetuate complexity rather than reduce it. This concern misunderstands what integration-first actually means.

Here's what integration-first means in practice:

- **Integration-first doesn't mean never consolidate.**
It means consolidate when there's a compelling reason. The decision should be driven by measurable value and risk, not the appeal of platform uniformity.
- **Integration-first doesn't mean unlimited tool sprawl.**
It means governing diverse tools effectively through unified control planes rather than through forced standardization.
- **Integration-first doesn't mean avoiding modernization.**
It means modernizing progressively and maintaining productivity throughout, rather than accepting massive disruption for uncertain future gains.

If your organization is looking to modernize without the disruption of a platform migration, CloudBees is built for you.

CloudBees Unify provides a centralized control plane that integrates the tools you already use, delivers consistent governance, and keeps your infrastructure AI-ready.

See how enterprises are transforming faster with integration-first DevOps. [Book a demo of CloudBees Unify.](#)



CloudBees Unify understands what many platforms miss—ripping and replacing simply doesn't work at the enterprise level. We need solutions that complement our existing systems, not conflict with them. That's exactly why CloudBees Unify is so compelling to us.



Sudhakar Parakala | Synaptics
VP of IT and Applications