Summary

Catalyst

Organizations are demanding higher levels of system and network availability, and cost effective business continuity. However, all this must be managed and maintained by a single department with one IT budget. This often leads to the creation of tensions between conflicting demands and priorities of production requirements where access and speed are desired qualities but must also provide resiliency and recovery. The main area of contention is the distinction between business continuity (BC), disaster recovery (DR), and backup and recovery (B&R), and how these share the budget to deliver what the end user wants, and minimize the impact of any loss of data or service. This report provides a side-by-side comparison of leading enterprise backup and recovery solutions, looking at the ability to deliver a holistic backup and recovery strategy. The results are delivered as the Ovum Decision Matrix (ODM), which considers the significance of all three aspects of a backup and recovery strategy and how these influence how technology is deployed, used, and controlled.

Ovum view

Backup and recovery are aspects of systems management that are typically forgotten about until they are needed. However, managing the production systems and the backup systems as a single entity has significant benefits, as well as significant challenges. Technology advances have created the position where providing the infrastructure to provide resiliency does not have to mean redundant and expensive capacity, and the systems can be used as part of an active backup plan. However, security remains a key issue with all aspects of data protection, and Ovum believes that this area represents the next wave of product innovations.

The terms continuous availability (CA), high availability (HA), fault tolerant (FT), BC, and DR have been used by the x86 virtualization vendors as potential added benefits from using the virtualization technology. Today there are many more products on the market offering solutions that address the issues surrounding the question of how to provide a differentiated level of service availability, based on business priority. The solutions nearly all operate across both the physical and virtual environments, but some newer vendors have specialized in virtual-only.

Ovum research (2013 Global enterprise infrastructure management survey, n=700) indicated that x86 virtualization accounted for approximately 50% of the x86 market. The survey also showed that its adoption was continuing to grow, with physical x86 deployments declining. This market shift introduces a dilemma for many CIOs regarding when to adopt a virtual first solution approach, and what to do with legacy physical environments. The issue is that many traditional availability backup and recovery solutions are not designed for virtualized environments, and lack some of the advanced features and capabilities of the virtual-only solutions. Cloud computing and the move to an as-a-service delivery method is also beginning to create tensions and splits in organizations’ backup and recovery strategies, with questions being raised about location and latency.

The issue for CIOs is that these technologies need to be administered and configured correctly to provide solutions to the many different requirements for resiliency that organizations demand. Ovum believes that that management and the technology combined represent a powerful combination in enabling organizations to make choices about the type and coverage of backup, recovery, DR, and
BC needed for their particular circumstances. However, we believe that the thorny issues of budgets, responsibilities, and priorities must be identified and resolved before any strategic backup plan is implemented. The strategic plan must also take due note of the IT and organizational strategy in terms of the use of new technologies and readiness to adopt new delivery methods.

Key findings

- Ovum's technology capability dimension evaluations showed that only two vendors scored an average of over 8, with CommVault the leader with a score of 8.6, and HP second with 8.3.
- In the execution evaluation, only Dell scored an average of over 9 and was the clear leader in this dimension.
- The market maturity evaluation dimension was the dimension that showed the least variation in scores.
- The challenger category showed the greatest consistency across all dimensions, with the vendors in this category having nearly identical scores.
- Operational management and backup capabilities were the leading technical capabilities on average across all vendors.
- Security and the reporting and integration technical capabilities were the lowest scoring on average, with a cross-vendor average of just over 5 out of 10.
- IBM and Veeam recorded the most, three, maximum category scores across all three dimensions.
- Symantec was the top performing vendor in terms of number of category-leading scores with seven in total across all dimensions.
- Only CommVault scored a maximum category score in terms of platforms supported, making it the only vendor that could offer enterprise backup and recovery across the variety of infrastructure platforms deployed.

Vendor solution selection

Inclusion criteria

The enterprise backup and recovery market has many vendors that offer solutions to customers of all sizes. However, the criteria to be included in this Ovum Decision Matrix are based on the ability to offer solutions for a range of enterprise customers of different sizes and with a different mixture of technologies, although x86 is the dominant technology in use and therefore any solution must operate in the x86 market. It must be noted that EMC, ExaGrid, and NetApp declined to take part in this edition of the Ovum Decision Matrix.

The criteria for inclusion of a vendor in the Ovum Decision Matrix for enterprise backup and recovery 2014–15 are as follows:

- The vendor must be a global vendor and have customers in at least two of the three regions: Asia-Pacific, EMEA, and North America.
The vendor must offer enterprise backup and recovery capabilities that enable management of data across all different types of media and must include at least two of the following: spinning disk, tape, cloud, or flash storage.

The vendor must have at least 500 customers, and they must be a mixture of mid-sized enterprises and large enterprises.

The vendor solution must have at least one reference customer with more than 200TB of data under management using its solutions.

Exclusion criteria

The enterprise backup and recovery market is considered a separate, but closely associated, category of the consumer backup and recovery market. Ovum accepts that for some vendors this is how they have entered this market, but this is not universally the case, and the solutions being evaluated are those specifically sold to enterprise customers. Vendors and products excluded from the analysis are determined on the following criteria:

- The vendor’s solution is only applicable to five of 11 different classifications in the features matrix (operational management, data management, platforms, security, backup capability, recovery capability, deployment and TCO, performance and scalability, replication, and reporting and integration).
- The vendor’s solution is more than 50% made up from partner solutions or third-party solutions.
- The vendor has no direct contact with end customers, with everything done through channel partners. Ovum accepts that some vendors have a channel sales-only approach, but these customers must have some process for direct customer interaction should the customer request it.

Methodology

Technology assessment

Vendors were invited to complete an enterprise backup and recovery features matrix, a comprehensive spreadsheet listing the product features that Ovum believes are required and desirable in an enterprise backup and recovery solution. The features matrix is a comprehensive technology questionnaire developed by Ovum analysts, containing hundreds of different criteria. Ovum then applied weights to these entries by individual row and section, based on the importance of each criterion. The final ranking of vendors in the Ovum Decision Matrix for Enterprise Backup and Recovery 2014–15 technology dimension is based on the scores vendors achieve from this analysis.

The criterion for a vendor to answer “yes” to a feature is that it must be available out-of-the-box in any product within its range of products that are applicable to its enterprise backup and recovery solution. A third-party provider, custom integration, or partnership is not sufficient to merit a “yes”. All vendors were made aware of this prior to completion of the questionnaire, and before publication of the report, vendors were given the opportunity to review their submissions again to ensure there were no discrepancies.

In this assessment dimension, Ovum analysts develop a series of features and functionality that provide differentiation between the leading solutions in the marketplace. The criteria groups identified for technology/service area are as follows:
Operational management: One of the key aspects of any management tool is how well it fits into existing processes and operational procedures, and whether the solution imposes any significant operational management overheads.

Data management: At the core of any enterprise backup and recovery solution is its ability to understand and manage the data.

Platforms: The breadth of coverage that a solution supports is an important feature in terms of the potential audience and how well the solution fits with an organization’s architecture.

Security: This capability looks at the ability of the solution to deliver different levels of security to match those needed by the different classification of data.

Backup capabilities: This capability considers the process of backing up data and how the solution supports the many different management requirements, types, scheduling, and so on of these backups.

Recovery capabilities: The complimentary capability to the backup is the ability to recover from a backup. This looks at the process and granularity of any recovery operation.

Deployment and TCO: Referring to a combination of assessed criteria and points of information, Ovum analysts provide detail on various deployment and TCO issues, including time, services, and support.

Performance and scalability: Points of information are provided to show the scalability of the solution across different scenarios.

Replication: Replication extends the scope of the solution to cover both HA/CA and BC/DR use cases.

**Execution**

In this dimension, Ovum analysts review the capability of the solution around the following key areas:

- Maturity: The stage that the product/service is currently at in the maturity lifecycle, relating to the maturity of the overall technology/service area.
- Interoperability: How easily the solution/service can be integrated into the organization’s operations, relative to the demand for integration for the project.
- Innovation: Innovation can be a key differentiator in the value that an enterprise achieves from a software or services implementation.
- Deployment: Referring to a combination of assessed criteria and points of information, Ovum analysts provide detail on various deployment issues, including time, industries, services, and support.
- Scalability: Points of information are provided to show the scalability of the solution across different scenarios.
- Enterprise fit: The alignment of the solution and the potential ROI period identified.

**Market impact**

The global market impact of a solution is assessed in this dimension. Market Impact is measured across five categories, each of which has a maximum score of 10.

- Revenues: Each solution’s global backup and recovery solutions revenues are calculated as a percentage of those of the market leader. This percentage is then multiplied by a market
maturity value and rounded to the nearest integer. Overall global revenue carries the highest
weighting in the market impact dimension.

- Revenue growth: Each solution’s revenue growth estimate for the next 12 months is
calculated as a percentage of the growth rate of the fastest-growing solution in the market.
The percentage is then multiplied by 10 and rounded to the nearest integer.

- Geographical penetration: Ovum determines each solution’s revenues in three regions: the
Americas; Europe, the Middle East, and Africa (EMEA); and Asia-Pacific. These revenues are
calculated as a percentage of the market leading solution’s revenues in each region,
multiplied by 10, then rounded to the nearest integer. The solution’s overall geographical
reach score is the average of these three values.

- Vertical penetration: Ovum determines each solution’s revenues in the following verticals:
energy and utilities; financial services; healthcare; life sciences; manufacturing; media and
entertainment; professional services; public sector; retail; wholesale and distribution;
telecommunications; and travel, transportation, logistics, and hospitality. These revenues are
calculated as a percentage of the market leader’s revenues in each vertical, multiplied by 10,
and then rounded to the nearest integer. The solution’s overall vertical penetration score is the
average of these three values.

- Size-band coverage: Ovum determines each solution’s revenues in three company size
bands: large enterprises (more than 5,000 employees), medium-sized enterprises (between
1,000 and 4,999 employees), and small enterprises (fewer than 1,000 employees). These
revenues are calculated as a percentage of the revenues of the market leader in each region,
multiplied by 10, and then rounded to the nearest integer. The vendor’s overall company
size-band score is the average of these three values.

**Ovum ratings**

- **Market Leader**: This category represents the leading solutions that we believe are worthy of
a place on most technology selection shortlists. The vendor has established a commanding
market position with a product that is widely accepted as best-of-breed.

- **Market Challenger**: The solutions in this category have a good market positioning and are
selling and marketing the product well. The products offer competitive functionality and good
price-performance proposition, and should be considered as part of the technology selection.

- **Market Follower**: Solutions in this category are typically aimed at meeting the requirements
of a particular kind of customer. As a tier-one offering, they should be explored as part of the
technology selection.

**Ovum Decision Matrix Interactive**

To access the enterprise backup and recovery Ovum Decision Matrix Interactive, an online interactive
tool providing you with the technology features that Ovum believes are crucial differentiators for
leading solutions in this area, please see the Ovum Decision Matrix Interactive tool on the Ovum
Knowledge Center.
Market and solution analysis

Ovum Decision Matrix: Enterprise backup and recovery, 2014–2015

The Ovum Decision Matrix provides a summary of the market standing of the major enterprise backup and recovery vendors based on a quantitative assessment of their technology capabilities, market impact, and ability to execute. It provides vendor selection guidance for enterprises looking to deploy an enterprise backup and recovery solution, and advises them on whether a vendor should be shortlisted, considered, or explored further. The Ovum Decision Matrix is a three-dimensional chart representing vendors’ scores in technology, market impact, and execution. Technology scores are represented on the x-axis and execution scores on the y-axis. The size of the bubble represents market impact score relative to the market leader. This edition of the Ovum Decision Matrix includes nine vendor solutions.

Figure 1: Ovum Decision Matrix: enterprise backup and recovery, 2014–2015

Source: Ovum

Figure 2: Expanded view of Ovum Decision Matrix: enterprise backup and recovery, 2014–2015

Source: Ovum

Table 1: Ovum Decision Matrix table: enterprise backup and recovery, 2014–2015

<table>
<thead>
<tr>
<th>Market leaders</th>
<th>Market challengers</th>
<th>Market followers</th>
</tr>
</thead>
<tbody>
<tr>
<td>CommVault</td>
<td>Acronis</td>
<td>FalconStor</td>
</tr>
<tr>
<td>Dell</td>
<td>CA Technologies</td>
<td></td>
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<tr>
<td>HP</td>
<td>Veeam</td>
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<tr>
<td>IBM</td>
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<tr>
<td>Symantec</td>
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</tbody>
</table>

Source: Ovum

Market leaders: CommVault, Dell, HP, IBM, and Symantec

The market leaders CommVault, Dell, HP, IBM, and Symantec all scored an average of over 7 out of 10 across all three dimensions, with HP and Symantec joint leaders with an average of 7.9. The separation between third and fifth in the leaders was very narrow, at just over 0.2 points. This group also recorded 26 out of the 33 category-leading scores across all the categories, demonstrating that the leader category was consistently above average. The leaders shared one key attribute in that all five were the only five vendors in the technology features dimension (shown on the X axis) to score an average of over 7 out of 10. This small degree of separation between the leaders means that when shortlisting vendors, enterprise customers need to apply additional weight to their specific...
requirements. For example, identify the vendors that are leaders in the key capabilities, such as replication, that match the enterprise’s biggest challenge. However, it should be noted that the performance of these vendors in the other dimensions (execution and market impact) was less clearly defined, and this therefore provides an opportunity for the challengers to target developments to close in on, or even overtake, the current leaders.

**Market challengers: Acronis, CA Technologies, and Veeam**

The market challengers Acronis, CA Technologies, and Veeam were separated by just 0.18 points, and represented a mixture of vendors with some strong categories and others that were comparatively weak. Veeam, for example, recorded four leading-category scores of which three were the maximum 10, CA Technologies recorded two leading scores, and Acronis none. The other noticeable difference between the leaders and challengers is that the challengers were consistently close across all the dimensions. Figures 1 and 2 clearly show that this group have comparable technical, execution, and market impact scores, which we believe provides a solid foundation from which to expand and enter the leader’s category in the future. Ovum also believes that that any of the vendors in this category have the potential to become a market leader, but to do so they must either address the capability gaps, or improve their overall performance in line with scores achieved by the market leaders. Overall, the challengers were nearly 1.2 points on average behind the leaders, but were 1.7 points above the average follower scores, and are therefore definitely positioned in the middle grouping, and clearly show the market remains a three-tier market. If enterprises focus on the key capabilities, members of this group should also be considered for shortlisting.

**Market followers: FalconStor**

There is only one market follower in the Ovum Decision Matrix: Enterprise Backup and Recovery 2014–15 report: FalconStor. Ovum believes that FalconStor has some excellent features and strengths but lacks comprehensive capabilities across all categories, demonstrated by the fact that FalconStor achieved only one category-leading score, compared to the whole group average of just over three. Ovum recognizes that FalconStor is developing their solution sets in this market, and have a different heritage to many of the other vendors. However, overall it scored an average of just below 5 out of 10, which was over two points below the whole group average of 7, demonstrating it still has some way to go to close the gap.
Market leaders

Market leaders: technology

Figure 3: Market leaders: technology

The technology dimension clearly demonstrates that the concept of a unified/integrated data protection solution from vendors is, for most, still work in progress. CommVault is the clear leader in this dimension with five category-leading scores and an average dimension score of 8.6, with HP second with an average of 8.3. These two vendors were the only ones to score over 8 out of 10. Figure 3 shows that between them they accounted for four (two each) of the five maximum category scores in this dimension. The gap from leader to the third-placed vendor in this dimension, IBM, was over one point. The significance of this is that while many claim to have a comprehensive unified data protection solution, only CommVault and HP can claim to actually offer one. Of the other vendors, CA Technologies, Dell, IBM, and Symantec all have good solutions that achieved above/close to the average score for all the capabilities in technology dimension.
Dell was the clear leader in the execution dimension, and the only vendor to score over 9 out of 10, with Symantec second, scoring just under 9. These two vendors also shared the top spot for a number of leading-category scores, with three each (see Figure 4). The gap from first-placed Dell to third-placed CA Technologies was just over one point, and only four vendors scored an average of over 8 (Dell, Symantec, CA Technologies, and Acronis). All vendors, except two, could scale to more than 100,000 customers. The major area of difference was in the ability to integrate with open source and best-of-breed solutions, which only three vendors (Dell, IBM, and Symantec) could achieve.

The enterprise backup and recovery market is a well-established and mature market, demonstrated by the fact that all the vendors in the ODM have had solutions in the market for over five years. However, it is the ability and degree to which these solutions are capable of change to meet the new total data protection requirement that enterprises are now demanding that Ovum believes will separate the leaders from the challengers. The most notable evidence is that the technology and execution dimensions have different leading vendors. This points to a changing market, where some vendors have addressed the technology capabilities as a priority and others the execution capability. Ovum expects that as these unified solutions and the market evolves, a group of clear leaders that appear in both technology and execution dimension as leaders will emerge.
Market leaders: market impact

The market impact dimension was the least differentiated of the dimensions in the ODM, and IBM was the dimension leader with an average score of 7.7. In total, five vendors’ scored over 7 out of 10 in this dimension and were separated by just over 0.5 points. The clear market leader in terms of revenue was Symantec, but in terms of revenue growth, three vendors: Dell, IBM, and Veeam were clear leaders. This points to evidence that the market is changing, and while the current market leader, Symantec, is continuing to grow, it is at an increasing lower rate than that of the newer entrants to this market. The data was not available to establish who has the biggest revenue in terms of the new unified solutions now being offered, or who is growing the fastest in this sector. However, Symantec with its large existing customer base is well placed to exploit any up-sell or cross-sell opportunity.
Vendor analysis

Acronis (Ovum recommendation: Challenger)

Figure 6: Acronis radar diagrams

ODM analysis

Acronis Backup Advanced v11.5.3

Strengths from the ODM

Acronis was broadly in line with the average score for the execution dimension and for most of the market impact dimension. This performance provides Acronis with a solid base from which to grow its influence in the market. It also has good market recognition in all geographies and across all industry sectors and customer size. Acronis performed above average in the technology dimension in four of the 10 categories, and its performance was particularly strong in the backup, recovery, and deployment and TCO categories, with the security capability also being above the whole group average. Ovum believes that this represents the heritage and technical expertise of Acronis, which is primarily in the traditional backup and recovery market.

Weaknesses from the ODM

Acronis's biggest weakness was the lack of publicly available customer references that accounted for its relatively weak score in the performance and scalability category. Ovum understands that this is in
part attributable to the way Acronis goes to market and interacts with its customers. Acronis’s other area of weakness is the reporting and integration category, where its lack of comprehensive built-in reporting made it one of the lowest scoring vendors in this category. Ovum understands that Acronis works well with many of the commercially available reporting tools.

**Opportunities identified from the ODM**

Acronis has a solid foundation in the market impact and execution dimensions, and good technology capabilities in the backup, deployment and TCO, security, and recovery categories. Ovum believes that that Acronis needs to build its technology capabilities across all categories to a similar level if it is to become a leader in the enterprise backup and recovery market. One of the biggest strengths of Acronis that is not exploited sufficiently is the UI, and in particular how with Acronis’s consumer background, the UI is designed to be intuitive and easy to navigate.

**Threats from the competitive landscape**

Acronis is at a pivotal point in the evolution of the unified data protection market. It has a solid reputation in the backup and recovery space and a good and appropriate UI designed for non-technical users. Ovum believes that more and more end users will be given the control and responsibility to manage their own data protection requirements, with IT departments focusing on core critical corporate data. The threat to Acronis is that in comparison to most of the vendors in this report, its revenues are low, which indicates its penetration into the market is also relatively low compared to some of its more heavyweight competitors. This can be seen as an opportunity, but is also a threat, as many corporate RFP processes require suppliers to meet a minimum revenue threshold, and Acronis may fall foul of this if it does not significantly improve its sales revenues.
CA Technologies (Ovum recommendation: Challenger)

Figure 7: CA Technologies radar diagrams

**ODM analysis**

**CA arcserve Unified Data Protection (UDP) v5.0**

**Strengths from the ODM**

CA Technologies produced a solid, in line with the average, result across the execution dimension, and most of the market impact dimension. It was particularly strong in terms of its scalability, enterprise fit, and innovation in the execution dimension, and recorded two category-leading scores in this dimension: innovation and scalability. Its score, particularly in terms of scalability, was helped by its lower than average total cost of investment required in mid-market deployments. Ovum attributes much of this to the Nimsoft and Arcserve influence that CA Technologies embraced when it acquired these vendors.

In terms of the technology capabilities, CA Technologies was strong in the reporting and integration, replication, deployment and TCO, and platforms categories, with these all scoring above average. Its above average score in the replication category was in part due to its ability to support replication over a distance of 100km with a latency of less than 100ms. Ovum believes that this is an important aspect because the requirement to provide access to corporate data in a disaster scenario increasingly requires distances of over 100km to ensure guarantee of service delivery, such as, for example, in the disaster in Japan in 2011 (earthquake and tsunami).
Weaknesses from the ODM

In terms of performance and scalability, CA Technologies’ weakness was a lack of reference customers with more than 0.5 PB under management, while the whole group was more than 10PB.

The release of arcserve Unified Data Protection is very recent at the time of writing this report, and as such the solution has not had sufficient time in the market for a thorough assessment by a representative sample of customers, although the software went through an extensive test phase. Early adopters initiated production deployments as of June 2014.

Opportunities identified from the ODM

CA Technologies’ biggest opportunity is to gather a number of customer reference sites and case studies to demonstrate its technology capabilities, particularly in terms of performance and scalability. Early adopters seemed satisfied with the ease of installation and first use of the solution, and a few have started deploying it in production. It should also be noted that arcserve UDP recently received its first award (UK Storage Magazine). Early performance benchmarks by NTL Labs indicate that the performance of CA arcserve UDP in terms of backup and recovery operations is superior to at least four of CA Technologies’ major competitors.

Ovum believes that CA Technologies has a promising solid technology capability that needs further market validation in the next few quarters. CA Technologies (see Figure 2) is well placed to close the gap between challengers and leaders in this ODM.

Threats from the competitive landscape

CA Technologies’ biggest threat is that in comparison to the market, its revenue growth and total revenues are below the whole group average. Ovum expects the interest in unified data protection to gather significant momentum over the next two to three years (Ovum ICT Enterprise insights 2014 survey, n=6,700). Ovum acknowledges that while this is a snapshot of relative performance in the market and does not provide a historical trending perspective, this will become more relevant when Ovum re-runs this ODM in 2016 and can comment on market growth over the last three years.
CommVault (Ovum recommendation: Leader)

ODM analysis

Products part of this evaluation

Simpana v10

Strengths from the ODM

CommVault was particularly strong in the technology capabilities dimension, where it was the clear leader with an average score of 8.6 out of 10. CommVault also recorded five of its six category-leading scores in the technology dimension, with two at the maximum 10 out of 10. CommVault was the only vendor to support all the platforms listed in the ODM, which makes it the most heterogeneous solution reviewed. Ovum believes that this is important because organizations typically have a mixed estate and are looking for a single solution to provide data protection across the entire environment.

CommVault was above average on all but one category in the technology dimension (nine out of the 10 categories), where it was again the clear leader in achieving this level of performance. However, the area where CommVault was clearly differentiated from the other vendors was in terms of replication. CommVault's average for this category was 8.5 out of 10, compared to the whole group average of 6.4, and over 1.4 points ahead of the vendor second in this category.
Ovum believes that that CommVault has the most advanced technology capability of all the vendors evaluated, and that it clearly understands the shift to unified data protection and the capabilities needed for it to deliver value to an organization.

**Weaknesses from the ODM**

CommVault was weakest in terms of the execution dimension where it was below average on five out of the six categories, and in line with the average for the other one. CommVault's weakest category was scalability, which was mainly due to it only scaling to 100,000 users compared to the group mode of 100,000 plus. The other aspect in scalability that effected CommVault's relative score was in terms of the investment needed across all deployment sizes, which was at least one level higher than the group mode. Ovum believes that investment and associated TCO are potentially organizationally specific metrics, which customers can weight accordingly.

**Opportunities identified from the ODM**

CommVault's score for geographic penetration demonstrated a very high reliance on North America and EMEA for its revenues. Ovum believes that for CommVault to fully exploit its technological leadership, it needs to expand its market presence in Asia-Pacific and emerging markets.

**Threats from the competitive landscape**

CommVault's biggest threat is its relatively low revenues compared to the other leaders in this ODM. Ovum acknowledges that its revenue growth is above average, but as Ovum identified, expanding into new markets is needed to fully compete with the other much larger (in terms of sales revenue) competitors. Ovum recognizes that to expand into new regions requires significant investment, so advocates that CommVault should look to partner with regional vendors to achieve this more cost effectively.
Dell (Ovum recommendation: Leader)

**Figure 9: Dell radar diagrams**

**Technology assessment**
- Operational management (10)
- Replication (8)
- Platforms (6)
- Security (4)
- Performance and scalability (4)
- Backup capabilities (6)
- Recovery capabilities (4)
- Deployment and TCO (4)

**Execution assessment**
- Maturity (10)
- Enterprise fit (6)
- Interoperability (4)
- Scalability (2)
- Innovation (4)
- Deployment (6)

**Market impact**
- Revenue
- Vertical penetration
- Revenue growth
- Size-band coverage
- Geographical penetration

Source: Ovum

**ODM analysis**

*Products part of this evaluation*

NetVault, AppAssure, and vRanger

*Strengths from the ODM*

Dell was strongest in the execution dimension where it was the leader with an average score of 9.1 out of 10. Dell recorded three category-leading scores in this dimension, including one maximum score for interoperability. Ovum believes that that the key differentiator for Dell is that it was one of only three vendors in this ODM that supported full integration with both open source and third-party best-of-breed technologies. Ovum believes that integration is significant because the majority of vendors, Dell included, do not support all the different platforms that are found currently in use in organizations. Therefore, if the solution is to be used as a unified data protection solution, integration with other solutions is required to ensure the widest possible coverage.

Dell was also strong in some categories of the technology dimension, where overall it scored above average and achieved one category-leading score for data management. Dell’s strength in data management comes from the combination of its hardware heritage and the acquisitions it has made over recent years. The first differentiator is the fact that Dell supports the use of either hardware or a software appliance, and this gives customers the flexibility to select the deployment method most...
suitable to their requirements. The second and biggest differentiator is the way in which Dell manages the range of capabilities associated with data management. Dell was the only vendor capable of supporting the use of policy-based prioritization, orphan detection and management, DRM support, pre-backup and post-backup processing of data, and the ability to preserve the physical characteristics of logical volumes so that these can only be restored to the same physical partitions.

**Weaknesses from the ODM**

Dell only recorded two categories across all three dimensions where it scored significantly below average. These were revenue in market impact, and performance and scalability in the technology dimension. In terms of revenue, the software division is relatively new within Dell, and while its total revenues are low, the revenue growth is best in class. The weakness in performance and scalability was as a result of Dell having three products that are not yet fully integrated, and only being able to provide a customer reference for 5PB of data being managed, while the group mode was more than 10PB. Ovum understands that the integration is work in progress, and once completed Dell will address this particular weakness, but Ovum would also advise Dell to produce more customer case studies and to get more customer references.

**Opportunities identified from the ODM**

Dell is going through a period of change because it has recently gone back to being a private company and is making itself more of a solutions-oriented company and not a product-based vendor. Dell has all the assets it needs to make this transformation, and its revenue growth demonstrates in terms of data protection that its vision of a unified data protection capability is resonating with its customers. Ovum would like to see Dell develop a branded solution in this space because we believe that most customers associate with the products from a time before Dell acquired them.

**Threats from the competitive landscape**

The single biggest threat for Dell is that the integration of its products into a single unified solution does not happen fast enough. Dell’s competitors are working on announcing fully unified solutions this year, so any delay by Dell will mean it could fall behind the market.
FalconStor (Ovum recommendation: Follower)

**Figure 10: FalconStor radar diagrams**

**Technology assessment**
- Operational management
- Reporting and integration
- Replication
- Platforms
- Performance and scalability
- Deployment and TCO
- Recovery capabilities
- Security
- Data management
- Backup capabilities

**Execution assessment**
- Maturity
- Enterprise fit
- Interoperability
- Scalability
- Deployment

**Market impact**
- Revenue
- Vertical penetration
- Revenue growth
- Size-band coverage
- Geographical penetration

Source: Ovum

**ODM analysis**

*Products part of this evaluation*

*Network Storage Server (NSS), Continuous Data Protector (CDP), RecoverTrac, and Optimized Backup & Deduplication*

*Strengths from the ODM*

FalconStor is particularly strong in terms of the operational management, replication and performance, and scalability. Many of FalconStor’s strengths come from its heritage and the fact that it is coming to this market from a different position than that of many other vendors in this ODM. FalconStor has four main products that work together, but specialize in different aspects of the data protection market. This approach makes FalconStor a strong solution in specific use-case scenarios. FalconStor recorded one category-leading score in the market impact dimension, where its size band coverage scored 8.5 out of 10, which means it has good exposure to a wide customer base and is well placed to exploit the growth in data protection.
**Weaknesses from the ODM**

FalconStor lacked the comprehensive capabilities of many of its competitors in a single integrated solution. Much of FalconStor’s weakness comes from its approach of providing domain expert solutions, and not a more general unified solution.

**Opportunities identified from the ODM**

FalconStor has proved it has the customer reach and domain expertise to compete with much larger competitors in this ODM. Ovum believes that that by developing an integration approach and increasing the diversity of its pool of partners, FalconStor could offer a more unified and comprehensive data protection solution.

**Threats from the competitive landscape**

The biggest threat to FalconStor is that the more generalist unified data protection solutions become the dominant approach that customers select, moving away from deep domain expertise. If FalconStor does not develop its solutions to match this market demand, it could become a specialist solutions provider. While Ovum’s ICT Enterprise Survey 2014 (n=6,700) indicates that the market direction is moving toward more generalist solutions, specific niche solutions will still be used.

**HP (Ovum recommendation: Leader)**

**Figure 11: HP radar diagrams**

![HP radar diagrams](source: Ovum)
ODM analysis

Products part of this evaluation

HP Data Protector

Strengths from the ODM

HP was the joint leader in the Enterprise Backup and Recovery ODM 2014–15, with an average score of 7.9 out of 10 across all three dimensions. It was one of the top two vendors in the technology capability dimension with an average score of over 8 out of 10, placing it within 5% of moving beyond sharing this spot to leading in this dimension. HP’s solution was a category-leader in four of 10 technology categories and it recorded two maximum 10 out of 10 scores. Ovum believes that that HP’s significant differentiator is that it was the only vendor to score 10 out of 10 in performance and scalability, which demonstrated that the HP solution deals with large volumes of data, 10PB plus, and was also one of the fastest for data recovery solutions in this ODM, with less than five minutes to recover a 100GB file from a 200GB tape backup.

HP’s performance in the ODM was consistently above average, with only one category scoring significantly below average. Another category-leading score was in the reporting and integration category, which Ovum attributes to HP’s use of operational analytics. The use of operational analytics as a key decision support tool is a practical and defined use case for this new technology. Ovum believes that HP, by invoking its strength in analytics, is able to deliver complete end-to-end visibility from the data source to the target device, including deep visibility into the relevant processes and interrelated activities. This holistic view provides IT administrators with the ability to make better informed decisions based on cost, quality of service, utilization, and/or performance.

Weaknesses from the ODM

HP recorded only one area for improvement: in the execution dimension the interoperability category where it recorded a below average score. This score was mainly attributable to its limited integration with third-party snapshot solutions out-of-the-box compared to some of its competitors in the market. Ovum found HP’s snapshot integration to be robust, with support for both HP arrays (3PAR, StoreVirtual, and XP) and leading third-party storage vendors such as EMC and NetApp. Snapshot integration, however, becomes more limited in the next level down (integration with platforms such as Dell EqualLogic or IBM XIV). HP has said it is working on developing a new approach to third-party integration around unified snapshot management, and will release (starting in late July 2014) the ability to support new storage array vendors using a more standard interface and integration approach. Ovum believes that this will greatly improve HP’s penetration into the broader storage market, and that this is an important factor for customers who rely on a heterogeneous data center with customized and/or multi-vendor toolsets. Ovum accepts that HP Data Protector can integrate with other solutions, but requires some customization.

Opportunities identified from the ODM

HP has a number of companion products, including HP Connected Backup and HP LiveVault, which provide solutions for mobile device data management and cloud backup. Ovum believes that by packaging these solutions with Data Protector, specifically for the mid-market, one combined solution would create a significant point of difference to the rest of the market. Ovum understands that HP has a turnkey data protection solution for SMB customers, but believes that if this could be delivered as a
SaaS offering and extended in scope to provide a one-stop solution, it would have greater appeal for the SMB market segment.

 Threats from the competitive landscape

The change in the way in which IT departments are structured and operated is creating wider use of more IT generalist, which requires simplicity as a key consideration in datacenter toolsets. Ovum believes that the complexity of HP Data Protector is an area where engineering focus is required, with an additional focus on ease of use and integration into the broader HP Software management stack.

Many new entrants in the market are focusing on the SMB sector, with simplicity and ease of use a key design principal, but at a lower price point. Ovum believes that that if HP’s footprint is to be extended beyond the upper mid-market and enterprise customers, HP must investigate a tiered version of Data Protector that maintains the simplicity and ease of use but is feature-limited and priced for the SMB market. This would drive faster HP solution adoption and build an install base that is primed to upgrade to more feature-rich versions at a later point while still taking advantage of the Adaptive Backup and Recovery vision.

IBM (Ovum recommendation: Leader)

**Figure 12: IBM radar diagrams**

Source: Ovum
ODM analysis

Products part of this evaluation

IBM Business Continuity and Resiliency Services (BCRS), BCRS Cloud Managed Backup, IBM BCRS Cloud Data Virtualization (CDV).

Strengths from the ODM

IBM has a strong solution that performed well in all three dimensions, and achieved three category-leading scores, one per dimension, with all three the maximum 10 out of 10. Overall IBM provides a solid solution to unified data protection. Particular strengths of IBM’s solution compared to its competitors are its execution dimensions score in interoperability, and its technology dimensions score in backup capabilities. IBM was the leader in the market impact dimension with an average score of 7.79 out of 10 compared to the group average of 6.48.

In terms of interoperability, IBM was strong as a result of its ability to support open source and third-party solutions out-of-the-box. Ovum believes that this ability represents both a strength and an opportunity for IBM to exploit. This is because, as customers look to implement a unified solution to data protection, inevitably the question of “will it work with this solution I have for a specialist system?” will arise, to which IBM has the best chance of answering yes too.

In terms of backup capabilities in the technology dimension, IBM was the only vendor to be able to back up all the different option types listed. The ability to back up in-memory applications was a significant differentiator, with IBM and one other vendor the only ones capable of meeting this requirement. Ovum believes that the breadth of coverage and backup types are significant because this will reduce the need for additional specialist solutions.

Weaknesses from the ODM

IBM performed least well in the size band category in the market impact dimension and the deployment and TCO category in the technology dimension. In terms of size band, IBM has good market awareness in the mid-size organizations and above categories, but struggles with market awareness and penetration in the SMB sector. The deployment and TCO weakness can be attributed to two main aspects. First, the time taken to install and configure a typical 250TB backup deployment to disk and tape of more than one day was longer than the group mode of less than one day. Second, IBM’s need for specialist consulting to recover information from a backup up of any age (more than five years) was weaker than the group mode that could recover the data without specialist consulting.

Opportunities identified from the ODM

IBM has a solid product that meets the needs of all markets, size bands, verticals, and geographies, but IBM is currently under-represented in the SMB sector. Ovum believes that that the lack of a freemium product does not help in reaching this sector. IBM is, however, looking at expanding its reach with new partnerships and extending the product portfolio with new offerings to specifically address mid-market customers.

Threats from the competitive landscape

Over the last few years, IBM has made several acquisitions in the cloud, storage, and visualization space (SoftLayer, Aspera, and CSL) that all strengthen its capabilities. While these acquisitions bring unique capabilities to IBM, there remains an integration challenge regarding how well these will be integrated with IBM’s platform and offerings. IBM has taken steps to combine the best offerings, such
as the addition of disaster recovery and managed security services for its SoftLayer customers, but it will need to move quickly to counter the threat of competitors that are introducing unified solutions in 2014.

**Symantec (Ovum recommendation: Leader)**

*Figure 13: Symantec radar diagrams*

**ODM analysis**

*Products part of this evaluation*

NetBackup

**Strengths from the ODM**

Symantec was the joint leader in the Enterprise Backup and Recovery ODM 2014/15, although it was not a leader in any of the three individual dimensions. Ovum believes that it was Symantec’s solid above-average performance across all dimensions that marked it as the overall joint leader. Symantec was strong in the execution dimension where it was second overall with an average score of 8.9 out of 10, less than 0.2 points behind the dimension leader. Symantec also executed significantly above average in four out of the five categories in the market impact dimension. Symantec gained the most category-leading scores from the whole group across all three dimensions, seven in total, with two maximum 10 out of 10 scores.
However, Ovum recognizes Symantec's biggest strength is a combination of its heritage and expertise in the backup and recovery market, which enabled it to be the leader in the technology dimension in terms of deployment, total-cost-of-ownership, and data management. Ovum particularly thinks that Symantec has two key strengths that are worthy of note.

First, the solution addresses the needs of enterprises with large workloads. The NetBackup Platform caters for virtual machines, overcoming the challenges enterprises face with the fast expanding number of virtual machines in their environments, the use of multiple hypervisors, unmanageable data growth, and complex physical-to-virtual automation. NetBackup 7.6 Accelerator for VMware provides up to 35 times faster backup than traditional backup processes by leveraging VMware's vSphere Changed Block Tracking. It provides the possibility of obtaining aggressive recovery point objectives (RPOs) and recovery time objectives (RTOs) by using its Replication Director module, without losing the advantages of its dynamically adaptable Virtual Intelligent Policies functionality and still offering granular restore possibility.

Second, it provides a data protection platform that enables cloud deployment and its OpenStorage architecture. Symantec has extended the NetBackup platform solution to allow its partners to use it as a platform that will enable them to provide cloud-based or on-premise managed backup services. With its software-as-a-service architecture, vCloud Director Support, it provides protection to VMs in both public and private deployments with vCloud Director Backup API integration. The expanded flexibility of the OpenStorage architecture now enables Symantec to deliver integration with cloud storage vendors such as AWS, AT&T, and Rackspace.

Weakenesss from the ODM

From a technological perspective, Symantec has one weakness with NetBackup 7.6 Replication Director for VM snapshots in that it only supports VMs on NetApp arrays, and other vendor storage arrays are not yet supported. Symantec is, however, working toward extending the support in future releases.

Opportunities identified from the ODM

Symantec offers its solution as a multi-tenant, self-service option for enterprises and partners that want to deploy and deliver backup-as-a-service (BaaS) to their internal users and/or external customers. While this approach has some merits, Ovum sees more opportunity for a fully branded BaaS offering from Symantec, the current market leader. Ovum also believes that Symantec has a couple of other opportunities to explore, including expanded de-duplication capabilities for Symantec appliances, and strengthening partnerships with reseller OEMs that could be a key driver in reaching enterprises.

Symantec doubled the NetBackup appliance backup capacity to 144TB for de-duplication storage as part of the latest maintenance pack release. Enterprises that already have a Symantec NetBackup appliance can now add up to two extra storage shelves to an existing appliance, ensuring no data loss as a result of insufficient storage resources. Ovum believes that this could provide an opportunity for Symantec to work with existing customers and strengthen confidence and trust in its large accounts.

Symantec has also made deliberate efforts to strengthen its channels to market, both direct and indirect. A new channel program launched in 2014 will expand and improve routes to market through channel partners and OEMs in the coming 12 months. This will include rigorous training, enablement offerings, financial incentives, and rewards to make profitable and effective partnerships. Symantec has also enhanced its global partner programs and has new technology partnerships with
organizations including Hitachi Data Systems (HDS), and new solution provider relationships with companies including SunGard.

**Threats from the competitive landscape**

The main threat for Symantec is similar to that for the other established backup and recovery vendors and revolves around the market transitions to a newer unified data protection solution. Ovum believes that with NetBackup, Symantec has a solution that fits with the unified data protection thinking, but it needs to migrate its existing large customer base from incumbent point solutions. The threat is that the cost of migration may push CIOs to perform an RFP and open up an existing customer to competitors. NetBackup 7.6 has enhanced and extended features, but Symantec still faces fierce competition from niche, startup, OEMs, and software companies that are entering the backup and recovery market with point backup solutions. There is a long development cycle for new products, with an 18-month main release cycle for NetBackup and a three-month maintenance/proliferation release objective. Symantec needs to more rapidly develop and deliver new products or upgrades to assure sustainability in its market share and customer base.

**Veeam (Ovum recommendation: Challenger)**

*Figure 14: Veeam radar diagrams*

Source: Ovum
ODM analysis

Products part of this evaluation

Veeam Backup & Replication

Strengths from the ODM

Veeam produced a solid performance across all three dimensions, with the market impact and execution dimensions both recording above average scores. Across these two dimensions, Veeam recorded four category-leading scores, of which three were the maximum 10 out of 10. Veeam’s market impact showed it was the fastest growing of all the vendors in this ODM, and also had the best geographic split. Ovum believes that much of this is due to Veeam’s 100% channel approach, which enables rapid growth and greater penetration than the more traditional direct sales approach.

In the technology dimension, Veeam had a mixed performance, but was particularly strong in terms of operational management, where it was the third highest scorer. Veeam’s biggest strength is that a single FTE administrator can manage and configure more than 10PB of data. Veeam was also in line with the average for backup capabilities, performance and scalability, and deployment and TCO.

Weaknesses from the ODM

Veeam’s only two standout weaknesses were its size-band coverage, where it was heavily biased toward SMB and mid-market customers. Ovum attributes this to its 100% channel go-to-market approach. Veeam’s other area of weakness was in terms of its technology capabilities in respect of replication, and its lack of capability to support real-time data replication over extended distances with acceptable levels of latency (less than 100ms).

Opportunities identified from the ODM

While Veeam works with its partners to enable a service-oriented cloud delivery approach via its Veeam Cloud Provider Program. However, Veeam sells enterprise customers an on-premise-only solution. Ovum believes that allowing partners to “white label” Veeam’s solutions provides an approach to enter this new and expanding market, but at the cost of losing brand recognition.

Threats from the competitive landscape

Veeam has grown significantly over the past six years, and recently hit the 100,000 customer mark. It has achieved this through a channel-only strategy and has over 23,000 channel partners globally. Ovum believes that as the ecosystem expands, the challenge of maintaining a quality of service and support will become more difficult. However, Veeam recently introduced a certified technical engineer accreditation for partners that will help in this regard.

Appendix

Methodology

- Vendors complete an in-depth questionnaire and comprehensive capability matrix, which is analyzed and evaluated.
- There is a series of comprehensive, structured meeting, including a demonstration where appropriate.
Vendor literature and websites are used for supplemental information, as well as the results of Ovum surveys, some of which are specifically designed for this report.

The article is peer reviewed and is authored by at least two analysts.

Further reading

*The Fundamentals of Backup and Recovery* (March 2014)

*Cloud Backup and Recovery Strategies* (May 2014)

*Using Snapshots for Data Protection and Disaster Recovery* (May 2012)

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