

Ovum Decision Matrix: Selecting an Enterprise Backup and Recovery Solution, 2014–2015

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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 and the general performance capability.
- **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

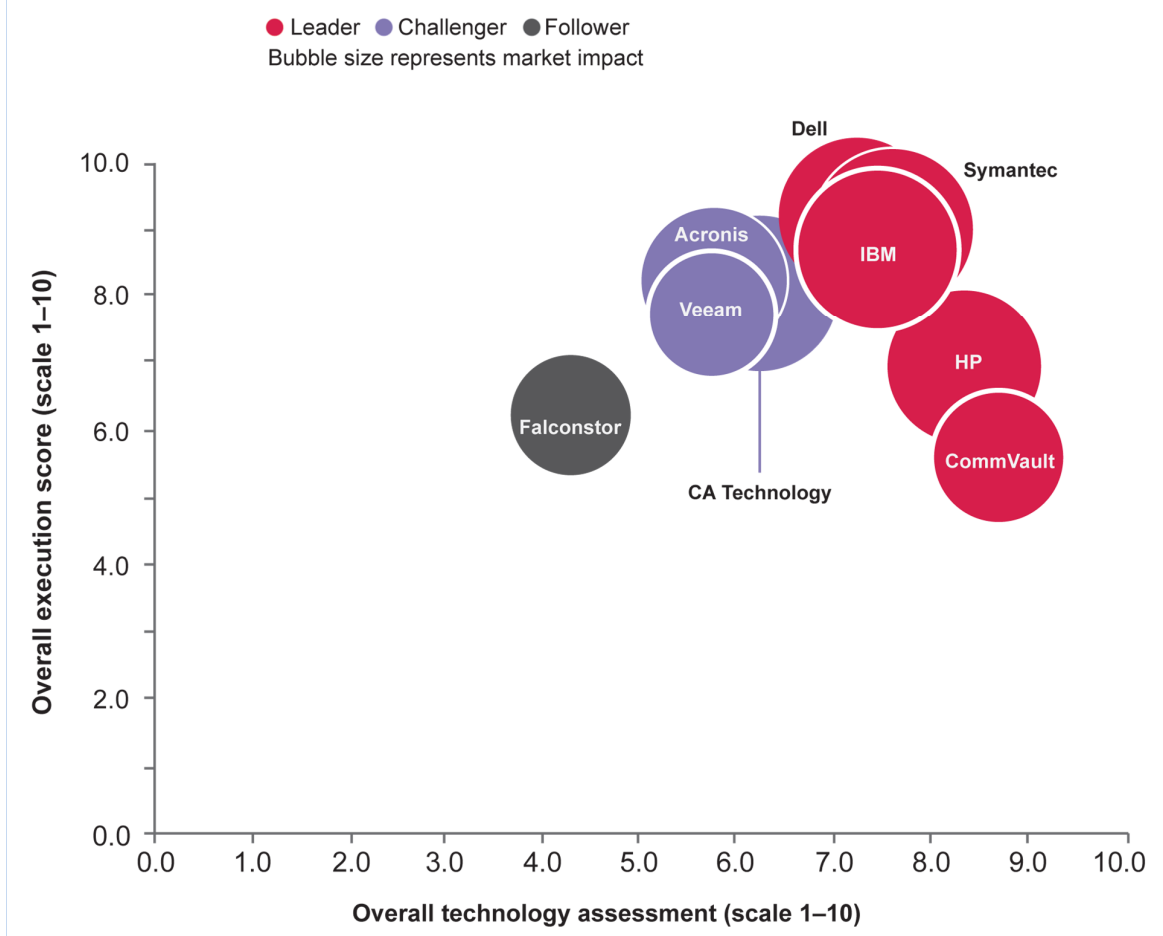
To access the enterprise backup and recovery Ovum Decision Matrix Interactive, an online interactive tool providing you with the technology features that Ovum believes are crucial differentiators for leading solutions in this area, please see the Ovum Decision Matrix Interactive tool on the Ovum Knowledge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

Market and solution analysis

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

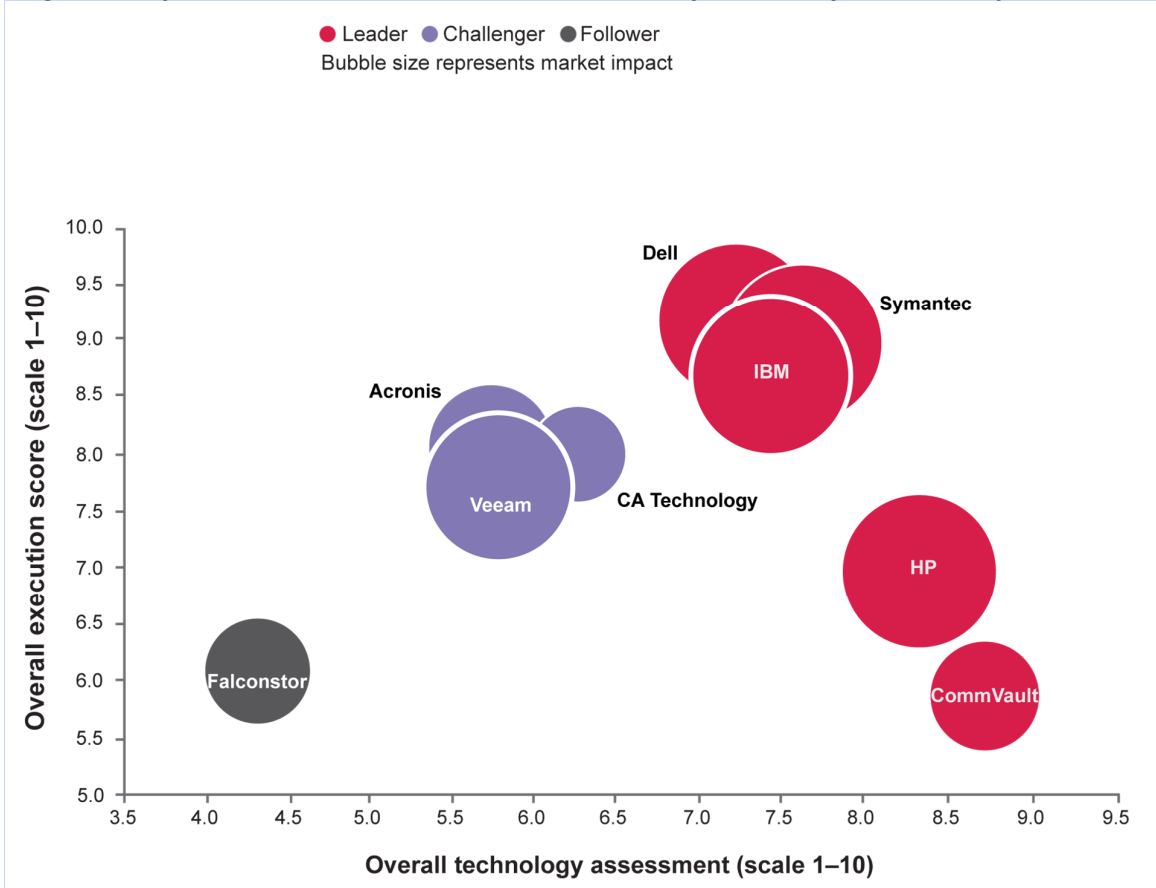
The Ovum Decision Matrix provides a summary of the market standing of the major enterprise backup and recovery vendors based on a quantitative assessment of their technology capabilities, market impact, and ability to execute. It provides vendor selection guidance for enterprises looking to deploy an 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

Market leaders	Market challengers	Market followers
CommVault	Acronis	FalconStor
Dell	CA Technologies	
HP	Veeam	
IBM		
Symantec		

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 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.

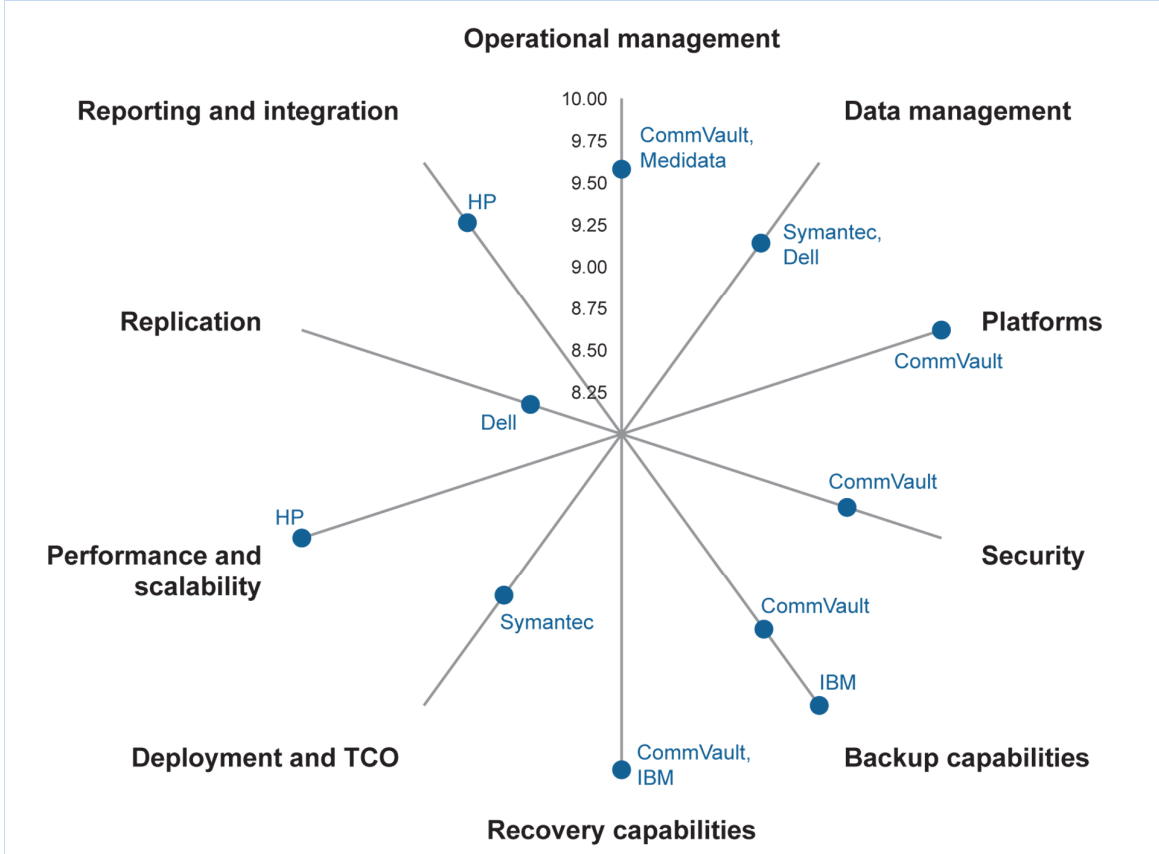
Market followers: FalconStor

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

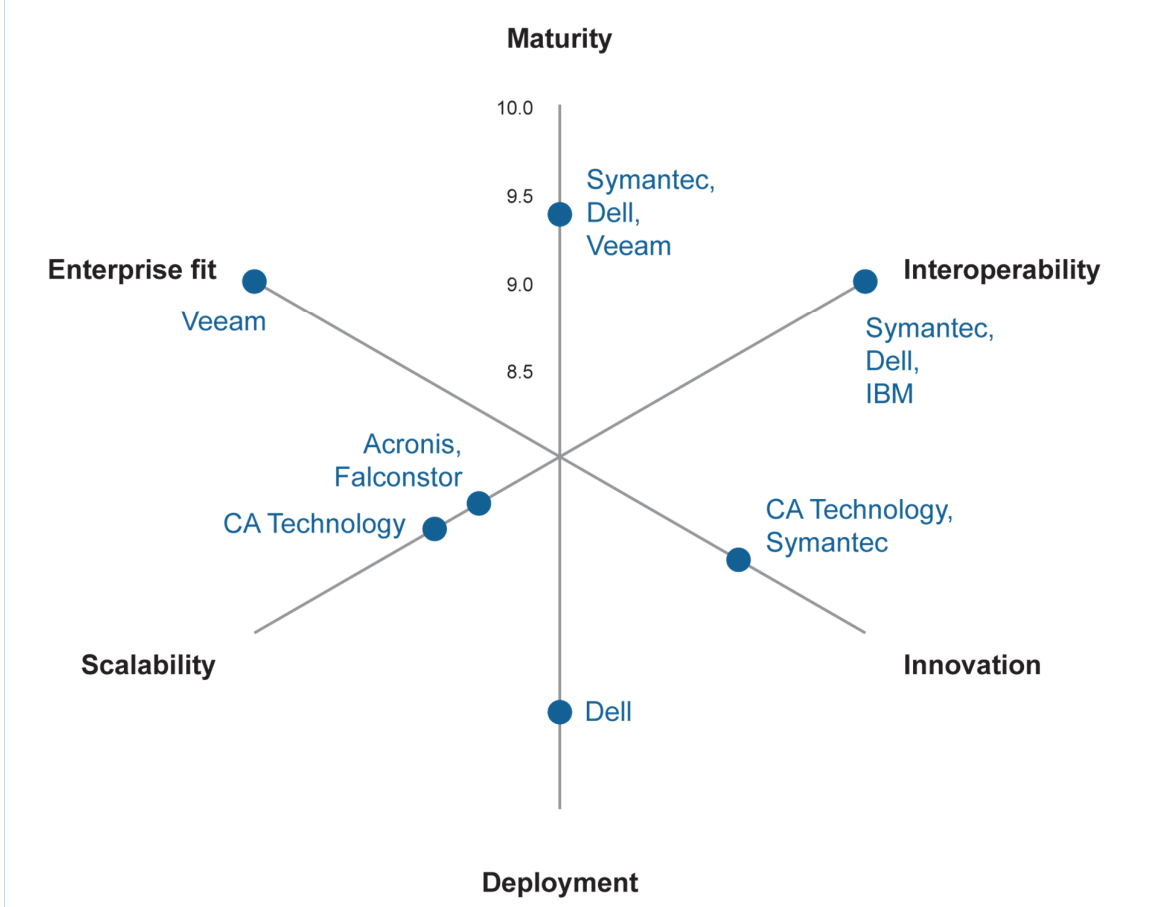


Source: Ovum

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.

Market leaders: execution

Figure 4: Market leaders: execution



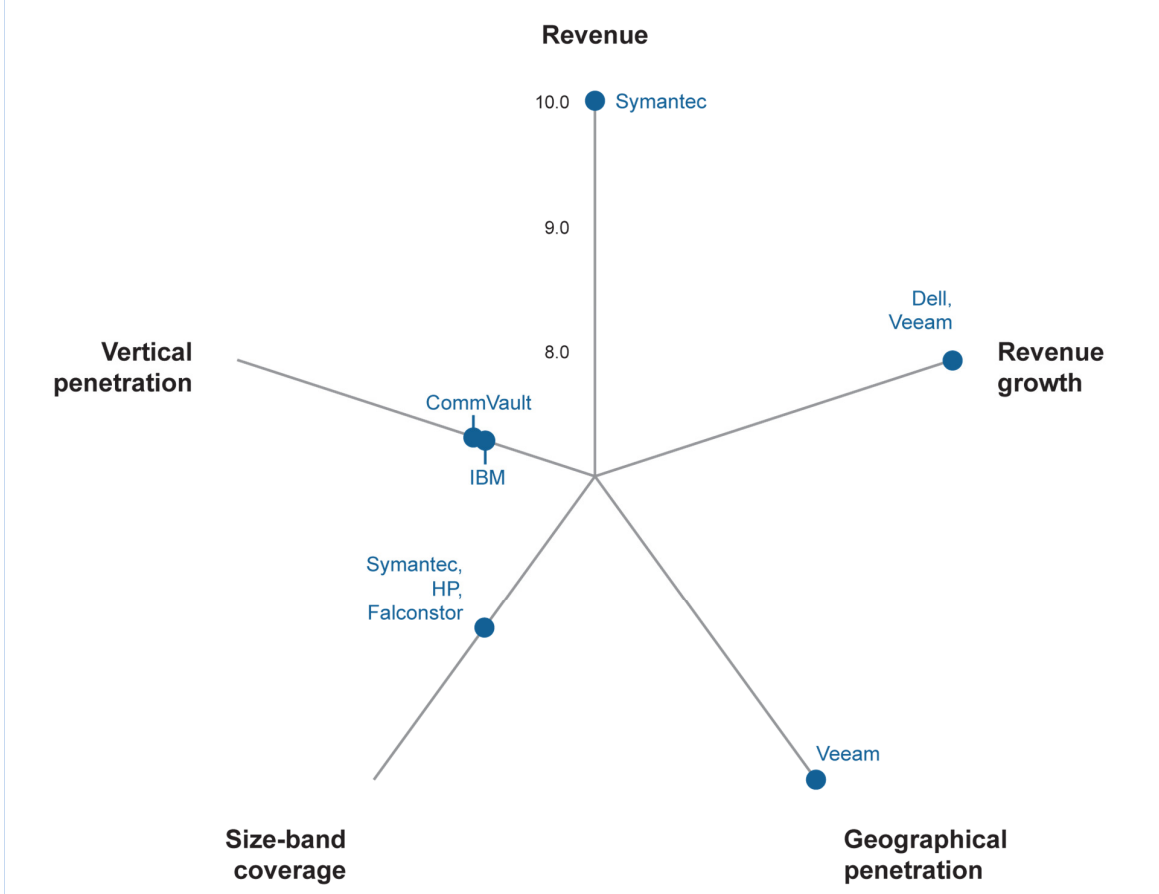
Source: Ovum

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

Figure 5: Market leaders: market impact



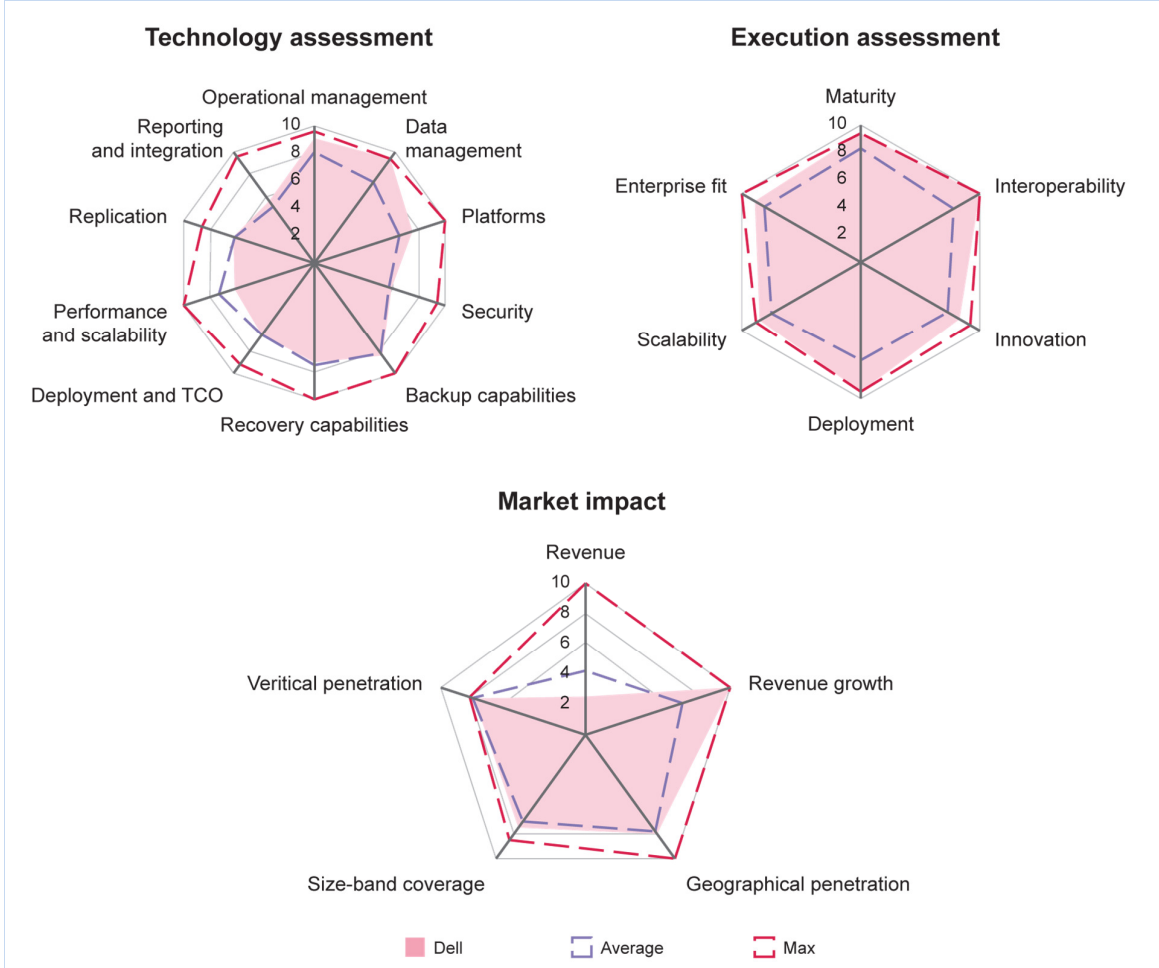
Source: Ovum

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

Dell (Ovum recommendation: Leader)

Figure 9: Dell radar diagrams



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.

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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