

Magic Quadrant for Enterprise Backup Software and Integrated Appliances

16 June 2014 ID:G00262146

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VIEW SUMMARY

Enterprise backup is among the oldest, most-performed tasks for IT professionals. Gartner provides analysis and evaluation of the leading providers that offer a range of traditional to innovative recovery capabilities.

Market Definition/Description

This Magic Quadrant describes the evolution of backup, which incorporates new products, solutions and techniques for protecting, backing up and recovering physical server and virtual server files, applications, system images and remote offices and endpoint devices. These backup products provide features such as traditional backup to tape, backup to conventional disk or virtual tape library (VTL), data reduction, snapshot, heterogeneous replication, and continuous data protection (CDP). These solutions may be provided as software only, or as an integrated appliance that contains all or substantial components of the backup application, such as backup management server or a media server.

This Magic Quadrant for Backup/Recovery Software and Integrated Appliances is an update to the Magic Quadrant for Enterprise Backup/Recovery Software that was last published in June 2013, but with an expanded consideration of the included vendors' branded integrated backup appliances, if one exists.

Organizations are increasingly making their backup product selection from vendors that offer expanded protection capabilities and techniques, in addition to traditional tape-based backup software, as they have come to understand the value of backing up critical data via multiple methods. Many of these vendors would have been considered nontraditional suppliers of recovery solutions only a few years ago.

Because the backup/recovery software and integrated appliance market comprises tens, if not hundreds, of vendors, this research narrows it down to those that have a strong presence in midsize and large organization IT environments. It also excludes backup software for a homogeneous environment (such as native tools from Microsoft or VMware for their own specific platforms), as many midsize and large customers prefer a single, scalable backup product for their entire environment. Endpoint or remote-office-only solutions are also not covered in this research.

The emphasis of this Magic Quadrant is on the backup and recovery software capability (i.e., the backup application). However, for vendors that meet the inclusion criteria (weighted heavily toward the backup application), their backup/recovery software and the branded hardware portfolio that offers an integrated backup appliance are evaluated.

The vendor profile on a Magic Quadrant is not product-specific, but rather represents the vendor's overall position in the enterprise backup/recovery software and integrated appliance market. This means that vendors that do not possess a heterogeneous backup application or that deliver only disk-based target appliances are not eligible for inclusion in this Magic Quadrant. Note that Gartner is launching a new Magic Quadrant for Deduplication Backup Target Appliances in 2014 to focus on such products.

Magic Quadrant

Figure 1. Magic Quadrant for Enterprise Backup Software and Integrated Appliances



STRATEGIC PLANNING ASSUMPTIONS

By 2018, 40% of organizations will augment with additional products or replace their current backup application.

Through 2015, despite the rise of disk-to-disk (D2D), disk-to-disk-to-tape (D2D2T) backup will remain the predominant strategy for large enterprises.

By 2016, 20% of organizations, up from 7% today, will employ only snapshot and replication techniques, abandoning traditional backup/recovery.

By 2016, less than 30% of all big data will be backed up.

By 2017, 70% of organizations will have replaced their remote-office tape backup with a disk-based backup solution that incorporates replication, up from 30% today.

By 2019, there will be a 50% increase in the number of large enterprises eliminating tape for operational recovery.

By 2018, the number of organizations abandoning tape for backup will double, whereas archiving to tape will increase by 25%.

EVIDENCE

Placement on the Magic Quadrant is based on Gartner's view of a vendor's performance against the criteria noted in this research. Gartner's view regarding vendor placement on the Magic Quadrant is heavily influenced by more than 1,400 inquiries and conference one-on-one meetings conducted during the past 12 months with Gartner clients on the topic of backup/recovery software and integrated backup appliances. Gartner also utilizes worldwide end-user surveys, Gartner conference kiosk surveys and Gartner conference session polling data. The Magic Quadrant methodology includes the solicitation of references from each vendor; for this Magic Quadrant, Gartner conducted over 110 reference checks (via electronic survey and/or live interview) from a set of customers provided by each vendor. The included vendors submitted nearly 900 pages of responses to Gartner's Magic Quadrant survey on this topic, which were used as the basis for subsequent vendor briefings and follow-up meetings, demos and correspondences. Gartner also conducted an online Research Circle Poll of Gartner clients regarding backup application trends.

EVALUATION CRITERIA DEFINITIONS

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the



Vendor Strengths and Cautions

Acronis

Acronis sells its Windows and Linux backup products to consumers and small or midsize businesses (SMBs), as well as point solutions such as bare-metal restore (BMR) to the enterprise, through channel distribution in 130 countries. In 2013, one of the Acronis founders returned to become the CEO, rebuilt the executive team and focused the company on SMB initiatives. In early 2014, Acronis simplified both pricing and the buying experience by repackaging its software suites and creating a new website. It also offers its products as a package for service providers and value-added resellers (VARs), which can use their own back-end storage or leverage Acronis' back-end cloud storage.

Acronis Backup targets small environments with a few physical servers and dozens of virtual machines (VMs), while the Acronis Backup Advanced suite targets larger environments among SMBs or enterprise departments. The advanced suite offers agentless backup/restore for VMware and Hyper-V environments, and agent-based backup/restore for physical systems and other virtual environments, such as Citrix XenServer, Red Hat Enterprise Virtualization (RHEV)/kernel-based VM (KVM) and Oracle VM. Its image-based backup offers a unified backup format that allows heterogeneous migration and recovery between different hypervisors and physical platforms. Acronis Backup for VMware, which is part of the Acronis Backup suite, is a different backup product and has a few additional functions that Acronis Backup Advanced currently lacks.

Strengths

- Acronis has a well-known brand in the backup/recovery industry.
- Image backup and BMR for Windows and Linux have comprehensive functions and are widely used. Customers comment favorably on its "universal restore" function.
- Customers cite the user interface as being intuitive and easy to use.

Cautions

- Acronis' backup products lack scalability and some management functions sought by large data centers, and are mostly adopted by SMBs or by departments in an enterprise.
- Acronis Backup Advanced lacks some competitive functions available through Acronis Backup for VMware.
- Acronis' backup products support only network-attached storage (NAS) systems via NFS/CIFS protocols.

Actifio

Actifio is an emerging vendor that offers an innovative data protection architecture for midsize to large enterprises and service providers. Its architecture consolidates traditional data copy silos generated by different software products via a live "golden image," which is used to create virtual copies for instant backup/recovery and test/development. Actifio has raised \$207.5 million in venture capital funding, the latest being \$100 million in March 2014. The vendor has about 330 customers, including 29 cloud service providers as of March 2014.

Actifio's Copy Data Storage (CDS) system is an integrated data protection solution leveraging disk-based technologies, such as deduplication, snapshot, replication, mounting of snapshots, cloning, storage tiering and storage virtualization. CDS can replace products that have been sold or licensed separately, such as enterprise backup solutions, remote replication/continuous data protection (CDP),

organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

array-based snapshots and cloning. Its granular block-level incremental-forever backup and global deduplication offers more storage efficiency than normal software or device-based snapshots and replication. CDS also automates the disaster recovery (DR) failover/failback test process, and offers instant recovery for both physical and virtual servers without requiring data movement. Many customers are pleased with its capabilities in the VMware environment, while others are attracted to the all-in-one solution for backup, DR and test/development.

In early 2014, Actifio introduced a software-only version of its product, called Actifio Sky, for the remote office/branch office (ROBO) environment. Actifio attempts to sell to high-level IT executives (above storage administrators and backup administrators) who may see more value in the unification of traditionally separate copy silos.

Strengths

Actifio's architecture removes backup windows and drastically improves recovery point objective (RPO) and recovery time objective (RTO) SLAs, compared to traditional backup/recovery methods.

User experiences are overwhelmingly positive, especially for the VMware environment.

Some customers have reported significant cost savings due to the elimination of multiple competitive products and reduced storage acquisition.

Cautions

The fact that Actifio is a small, private company remains a viability concern for some organizations.

Actifio does not currently have a master catalog; single file or object restores are supported only for Windows file system, Microsoft Exchange and SharePoint.

The Actifio CDS appliance only supports Fibre Channel (FC)-based storage for back-end storage connectivity.

Asigra

Asigra has been providing multitenant backup and recovery solutions designed for management service providers (MSPs) since its inception in 1986 and currently has almost a thousand partners that offer its solution as their own relabeled SaaS solution. The solution can also be procured as an on-premises, self-managed software product. Asigra claims close to one million protected global sites. The agentless architecture is a key feature of Asigra Cloud Backup software, with customers hailing the ease of use and management that an agentless implementation offers. Asigra's DS-Client supports ROBOs, desktops, virtual environments, laptops and tablets by aggregating data to DS-System servers that then send data to a backup cloud. Being designed for the cloud before the term was even in use; Asigra leverages many types of backup data reduction, including block-level incremental-forever processing, local and global deduplication, and many levels of compression.

Asigra provides robust backup/recovery capabilities that include CDP, endpoint backup and SaaS backup for Google apps and salesforce.com. Additionally, there is integration with snapshots created by Symantec's Veritas Storage Foundation (such as on Huawei storage devices) or NetApp arrays. Asigra provides broad hypervisor support (VMware, Hyper-V, Parallels and Xen) and offers virtual disaster recovery (VDR) to run a VM from the Asigra backup repository to quickly restart recovered production VMs and applications. Restore and Restore Assurance (R2A) provides autonomic healing and restore validation with 30 integrity checks that can request a new copy of the file or alert an administrator if there is no longer a valid copy that can be restored. Since the 2013 Magic Quadrant, Asigra introduced new partnerships with Cisco and NetApp, and a radically new licensing scheme called the Asigra Recovery License Model, which bases the majority of the product fees on the percentage of data that is actually successfully recovered.

Strengths

The low-touch, agentless architecture is available for physical and virtual environments.

The grid-based architecture enables scaling from small to very large deployments.

The Backup Lifecycle Management concept provides four tiers of backup as data ages over time, with optional deletion and data destruction certificates.

Cautions

The administrative interface remains outdated and can be complex to manage.

Snapshot support does not offer cataloging of individual objects.

Asigra does not offer a cloud storage service itself. This is usually designed, implemented and serviced by a partner, so experiences can vary depending on the skills of the chosen provider.

Barracuda Networks

Known in the SMB market for its security appliances, Barracuda Networks has quickly grown its backup business in the past two years, and has become a contender in the backup as a service (BaaS) market for SMBs. The vendor claims it has more than 18,500 customers with about 19,500 integrated backup appliances deployed at customer sites and 16PB of compressed and deduplicated backup data stored in its cloud. Its cloud data centers are located in the U.S., Canada, Germany, U.K., Japan and Australia.

The Barracuda Backup Agent, a single, self-updating agent for all applications, supports Windows and Linux servers. It features client-side global deduplication and incremental-forever processing after the initial full backup. Barracuda supports Microsoft Hyper-V and VMware vSphere backup at the hypervisor level, and agent or agentless (leveraging vStorage API for Data Protection [VADP API]) guest OS backup. Its LiveBoot function allows servers to be booted on the local appliance or in the Barracuda cloud (with a cloud-hosted hypervisor). Backups can be scheduled as frequently as every 15 minutes, with simultaneous replication. Local or cloud backup data can be accessed anywhere through a Web browser and restored to a server or to a folder in Barracuda's file sync and share solution called Copy. Unlike many other BaaS providers, Barracuda offers a long-term vaulting service for up to 12 monthly and seven yearly backup copies.

All appliances are preconfigured with cloud replication with encryption to replace traditional off-site tape copies. Multiple appliances can be managed by a single console. If an appliance fails and needs replacement, Barracuda will preload backup data onto the new appliance before shipping it to the customer. Although Barracuda's largest appliance supports 102TB of usable storage, most of Barracuda's customers are SMBs with a few servers and less than 10TB of storage. The vendor now offers a private

cloud solution with the same technologies.

Strengths

Barracuda offers an affordable, all-in-one hybrid cloud backup solution, which is easy to set up and manage, and offers short RPOs and RTOs.

Its LiveBoot and integration with Copy file sync and share services stand out among large competitors.

Barracuda is a public company and has healthy, sizeable revenue growth.

Cautions

Large enterprises looking for a solution should understand that Barracuda's success is mostly limited to SMBs.

Barracuda's BaaS offers relatively narrow OS and application support, reflecting its focus on SMBs.

Organizations evaluating cloud backup should make sure the vendor's security and exit policies meet their requirements before adoption.

CA Technologies

Until 2Q14, CA Technologies had three backup/recovery software products under the arcserve brand: CA arcserve Backup, CA arcserve D2D, and CA arcserve Replication and High Availability (RHA). The CA arcserve Backup product enjoys widespread brand recognition for traditional tape-based and D2D2T backup in the SMB and midmarkets, and in some larger enterprises. The CA arcserve D2D solution is a disk-only, image-based product that supports Windows and Linux via its Infinite Incremental data capture. The RHA product targets midsize to enterprise customers, as well as MSPs and OEMs, and offers true CDP with a rewind to any point in time, heterogeneous replication, and failover and fallback. RHA is touted as being the first product to offer assured recovery capabilities. References cite the agentless VMware and Hyper-V support that offers application integration and virtual standby capabilities as key reasons for using CA's products.

In May 2014, CA introduced its unified data protection (UDP) product; CA arcserve UDP is based on a new architecture and will be a multiphase integration of CA's backup portfolio. The product leverages RHA and D2D technologies, while introducing global source-side deduplication and built-in replication with a new Recovery Point Server (RPS) component. This is managed from a new Web services-based console with expanded reporting capabilities. Backup is via a workflow-based capability called "protection plans" that has been introduced as an evolving concept for easily specifying a recovery SLA, which UDP, in turn, uses to select the appropriate protection policies and methods. CA will continue to sell CA arcserve Backup and RHA separately, and plans to unify more of the CA arcserve Backup capabilities with the new UDP product over time.

CA most successfully sells its backup portfolio in Europe and Asia, and has increasingly garnered revenue from MSPs and recently delivered growth in the Americas. The vendor has just launched the new UDP offering, new branding, marketing and website in hopes of generating more revenue, especially in the Americas, and leveraging its strong SMB brand to sell to larger enterprises.

Strengths

CA offers a full range of data protection products. CA arcserve Backup is a robust traditional backup product for the SMB market, while its RHA and new UDP product are also solutions for traditional IT departments, MSPs and cloud providers.

Beta customers cite UDP as being a major leap forward in terms of offering advanced capabilities and providing greater ease of administration.

CA arcserve offers customers flexible, competitive pricing models (capacity- and CPU socket-based) to cater to different needs.

Cautions

Despite the presence of other CA products in large enterprises, the CA arcserve product family has been mostly deployed in the midmarket by SMBs and MSPs.

CA is in the midst of transforming its backup portfolio and its marketing and messaging; therefore, reference checking for new capabilities and applicability to larger environments becomes more important.

End-user file restore is not yet supported.

Catalogic Software

Catalogic Software is the former data protection business of Syncsort, which officially separated from Syncsort in October, 2013 through a buyout by senior management and venture capital groups. The new company takes with it the former Syncsort personnel and intellectual property associated with what was initially called Backup Express (BEX) and is more recently known as DPX data protection software, a component of the NetApp Syncsort Integrated Backup (NSB) and the new ECX Enterprise Catalog search and catalog solution. Catalogic's solutions are usually deployed in environments protecting from a dozen to hundreds of servers, with examples of 1,000 protected machines, and are also deployed by some MSPs.

In the past several years, Catalogic has searched for new differentiation and routes to market, and has been mostly inwardly focused on revamping its internal architecture to exploit open-source components and enable a more service-oriented interaction, and is slowly revamping its administrative console. The ECX Enterprise Catalog search and analytics product for discovering and cataloging VMware and NetApp snapshots was introduced in 2013 (it allows for a catalog that combines primary and secondary data assets), along with a new management portal. The vendor's 2015 plans call for the ECX interface and product capabilities to integrate with DPX to offer a backup and snapshot life cycle manager.

Strengths

Catalogic has the capability to provide fast and granular object, file or complete data center recovery from a single backup image.

Catalogic was the pioneer of Instant Recovery, not just for VMs, but also for snapshots of physical servers, enabling instant failover and resumption.

A block-level incremental (BLI) approach offers data reduction, which is further enhanced by

NetApp's deduplication and compression features when deployed via the NSB solution, and new primary snapshot life cycle management eliminates the backup window and reduces network traffic for data stored on NetApp storage.

Cautions

There is little mind share and market traction for BEX, DPX and NSB, and the spinout into a new, smaller company raises long-term viability concerns.

VM support requires agents in the VM for full functionality, causing some reference customers to augment the product with VM-specific backup solutions.

The primary storage snapshot recovery is limited to NetApp (supporting both v.7- and c-mode), but requires mounting the snap and manually finding the item.

CommVault

CommVault continues to be a mind share leader in the industry, marketing effectively and creating a perception of being a much larger vendor than it is, resulting in being on the shortlist in most Gartner backup inquiries. While still selling via partners to SMBs, CommVault has shifted to selling directly for large enterprises and collaborating with MSPs by growing its cloud services initiative worldwide. CommVault continues to be the most vocal and articulate proponent of the value of a unified data management platform, and the beneficial future of backup shifting toward the exploitation and management of storage array and NAS snapshots and replication. It seeks to serve as a manager of managers of a variety of data backup and storage options from a central console. CommVault offers its Simpana IntelliSnap snapshot protection capability, which integrates with the industry's broadest number of storage platform solutions to schedule and manage snapshots. CommVault has also been the most aggressive regarding the unification of backup, archiving and e-discovery, being the only vendor to deliver a highly integrated solution that offers all these capabilities through a unified architecture.

In version 10 of its Simpana software, CommVault has added more scalable, software-parallelized deduplication, workflow automation, and dashboard- and Web-based reporting features. Perhaps the greatest improvement in version 10 was the significantly increased scalability of the product and its components to better penetrate very large enterprises. Recent new features include enhanced VM failover, live mounting of a VM and endpoint protection updates, along with newly integrated file sync and share and VM life cycle management capabilities. Since the last Magic Quadrant, CommVault has expanded its partnerships with emerging storage vendors and broadened its worldwide resellers. Concerns over product costs have become an impediment, and CommVault recently restructured its pricing options via new suites and will soon offer pointlike, entry-level offerings that are based on Simpana.

Strengths

Simpana provides a unified architecture with a single administrative console and reporting engine for all backup (data center, remote office and endpoint), archiving, file synch and share, and search activities.

CommVault offers the industry's broadest support for integrating with and exploiting storage hardware platform replication and snapshots, directly supporting 19 of the top 20 selling storage arrays.

CommVault is now more frequently being effectively deployed in very large, geographically dispersed enterprises after scalability improvements in Simpana 10.

Cautions

Pricing has been CommVault's greatest struggle, with renewals and prospects frequently expressing concerns and sometimes augmenting CommVault with lower-cost VMware point products and/or choosing another vendor overall.

As CommVault further penetrates very large organizations and its array-based snapshot capability is utilized, more time and perhaps services need to be factored in to the deployment.

Some prospects and customers cite the lack of a CommVault integrated appliance as an impediment to implementation; however, in 2014, CommVault did collaborate with STORserver to create a prebundled solution, and the vendor claims that it will continue to expand its appliance offerings through additional partnerships in 2014.

Dell

Dell offers backup solutions derived from its acquisitions of AppAssure and Quest Software (NetVault and vRanger), and their respective integrated appliances, and partially based on the Ocarina Networks acquisition. The DL4000 integrated appliances running AppAssure can currently scale up to 80TB of deduplicated and compressed storage, and help Dell get into larger accounts. Dell's vision is to eventually merge VM backup-specific vRanger with AppAssure, and consolidate its backup products into an all-in-one data protection suite. The vendor has consolidated internal ordering and licensing systems into a single tool.

AppAssure targets the predominantly Windows environment (physical and virtual), and offers short RPOs and RTOs with its software snapshots and replication capabilities and robust protection functions for Microsoft Exchange, SharePoint and SQL Server. For fast failover and recovery, AppAssure offers Virtual Standby to allow an application to be run from the backup copy, and the Universal Recovery feature that creates a VM image of any virtual or physical server at every backup, which can be failed over to and run in production. However, AppAssure has limited penetration in the large enterprise. For midsized to large environments, NetVault — a traditional file-based backup product — supports many more OSs and enterprise applications than AppAssure. Dell revamped NetVault in the past year with client-side deduplication and a new catalog database that boasts better performance and scalability. Dell also offers a new user interface that has a consistent look and feel across its backup portfolio.

Strengths

Dell offers a range of backup software and integrated appliance products, catering to the vast majority of the needs of small and midsized enterprises.

For organizations running business-critical applications on Windows and Linux, AppAssure provides advanced backup techniques for short RPOs and RTOs.

For midmarket organizations with a mix of OS platforms and tape requirements, NetVault continues to be a capable backup solution, enhanced by its new source-side deduplication, updated

catalog and administrative console, and CDP option.

Cautions

vRanger customers and prospects should explore the product's future road map and obtain vendor commitments before renewing or acquiring.

Dell's vision of a single data protection suite is still a work in progress.

Some AppAssure customers cite the need for better reporting tools for more-customized reports.

EMC

EMC created its Data Protection and Availability Division in early 2014, which now includes all the vendor's backup and archive products, as well as RecoverPoint (a replication and CDP product) and VPLEX (a cross-site HA product). On the backup front, EMC has been challenged by streamlining its multiple backup products, derived from various acquisitions, and continues its journey of merging Avamar and NetWorker backup applications and integrating them with Data Domain. A significant amount of enterprise backup software sales are now driven by the prepackaged EMC Data Protection Suite, which includes Avamar, NetWorker and Data Protection Advisor, with options for MozyEnterprise for cloud backup and SourceOne for archiving. Despite the success of the software suite, individual products remain largely separate codebases and architectures.

NetWorker has become more robust in the past year with the releases of version 8.1 and 8.2. It has increased efficiency by using the Avamar engine for VMware backup, adding block-based backup for high-density Windows file system and supporting Data Domain virtual synthetics. NetWorker also now has snapshot management capabilities for NAS systems, such as EMC Isilon and VNX, and NetApp FAS. Avamar can now send all backup jobs from the local and remote client directly to Data Domain. It added multistream support for large file systems on Isilon, and enhanced service providers' capabilities by supporting REST APIs and integrating with VMware's vCloud Director and vCloud Hybrid Service.

Strengths

EMC's Data Protection Suite is gaining traction in the market.

NetWorker and Avamar provide self-service backup and recovery for vSphere administrators, while Data Domain Boost allows the same for database administrators.

New NAS support capabilities from NetWorker and Avamar will help ease backup bottlenecks for large NAS file systems.

Cautions

Full product integration among Avamar, NetWorker, Data Domain and Data Protection Advisor remain a work in progress while development for individual products continues.

Some customers report that portions of the backup management consoles for Avamar and NetWorker are not intuitive and need to be improved.

Instant access of VMs is limited to backup data that is written to a Data Domain appliance.

EVault

EVault has a long history of cloud backup, and differentiates itself with its support of a wide range of OS platforms and by owning a large number of data centers in North America and Europe. In the past year, EVault has actively engaged with Microsoft Azure, and offers Azure customers new options and new geographies. EVault touts 165PBs of compressed and deduplicated data managed in its cloud. While most often sold as a managed service, less frequently, EVault's backup software is also purchased by customers for their own on-premises deployment and usage.

The vendor's server backup architecture is agent-based, with "block delta forever" backup and target-side deduplication. WAN optimization is achieved through its patented "adaptive compression." EVault also sells a virtual appliance and a family of physical appliances for customers to deploy at their sites for faster recovery. In the past year, EVault added a new agent for Microsoft Hyper-V and launched a new consolidated Web-based portal with a new dashboard and reporting capabilities. It also started offering NetApp SnapVault customers an off-site backup service, by which customers can send their primary SnapVault instance to a secondary multitenant SnapVault instance in EVault's data centers. A new fast VM recovery function is planned for mid-2014, allowing customers to directly mount backup data in EVault's cloud.

Strengths

EVault is one of the few long-standing cloud backup providers that has accumulated experience and field-tested its products, which support broader platforms (including the IBM iSeries) than most competitors.

EVault has many more data centers than most competitors, augmented by Microsoft Azure, and provides an advantage for broader coverage areas.

Customers cite reliability, ease of use, local tape elimination and strong technical support as common reasons to adopt EVault cloud backup.

Cautions

Like most cloud backup providers, EVault typically serves customers who have relatively small backup environments, with a few servers and a few TBs of production data, although its largest customers support tens of TBs.

EVault has been late with its support for vSphere 5.5 and Hyper-V in Windows 2012/2012 R2. It also lacks some enterprise functions such as RMAN support.

EVault's backup agents support only Windows-based NAS directly, not NAS systems based on proprietary OSs (such as EMC or NetApp).

FalconStor

FalconStor offers several backup and recovery products. The Continuous Data Protector (CDP) product is evaluated as part of this Magic Quadrant. FalconStor touts 2,800 customers for all its backup and recovery products. The vendor offers a unique methodology for backup, utilizing out-of-band journaling of data changes that are mirrored to a secondary disk. The secondary copies result in application-

consistent snapshots that can be instantly mounted and booted, and are available for read and writes, all without requiring any rollback of logs. VM and physical server replication, failover, and verification are offered, all with WAN-optimized data transfer.

FalconStor has continued to experience high turnover at the executive and upper management levels during the past three years. Many customers and prospects have raised concerns over the vendor's viability — given the turnover, financial performance and federal lawsuit issues. However, its legal challenges have been resolved and the financial results have improved. Its latest executive team and marketing, sales and product efforts may just now be bearing fruit: FalconStor has released a new version of all three of its flagship products in 1Q14.

Strengths

FalconStor offers flexible and broad recovery solutions, ranging from CDP, heterogeneous server-based snapshot and replication to VTL capabilities, all of which offer data reduction capabilities.

FalconStor has application-aware (via a single agent), fine-grained replication and snapshots for near-instant restores and/or production failover to run from the FalconStor solution.

The RecoverTrac feature streamlines testing and execution of recovery plans for local and remote data protection of both virtual and physical server environments, and provides for automated failback procedures.

Cautions

Years of continued turnover within the vendor's management (high-level executives, marketing and development leads, and sales directors) has meant that the company and product visions have taken more time to be realized.

Users have cited the administrative console and error reporting as being cryptic.

There is no SharePoint granular recovery.

HP

This Magic Quadrant evaluates HP Data Protector for the data center, HP Autonomy LiveVault cloud server backup and HP Autonomy Connected Backup for endpoint backup, although the emphasis is primarily on server backup. HP's StoreOnce Backup deduplication technology is partially factored into the overall product-related rating as this technology is core to Data Protector's client-side deduplication capability. While not widely proposed or marketed, HP does opportunistically configure and sell an integrated backup appliance that is based on Data Protector, which the company plans to promote on a broader basis in 2014.

Data Protector has improved its scalability, and the relatively new backup catalog has proven to be more stable and scalable than its predecessor. In late 2013, HP announced its multiphased Adaptive Backup and Recovery (ABR) initiative, which will increasingly not only automate, but also proactively align, recovery approaches to application-specific workloads. HP has been focusing on integrating Data Protector with StoreOnce Backup deduplication appliances, as well as integrating Data Protector with its flagship 3PAR arrays and recently adding EMC Data Domain Boost support. Early to market with broad snapshot support, HP has recently updated its heterogeneous array support and Gartner believes that Data Protector is now the second-broadest snapshot manager in the market. Data Protector's Zero Downtime Backup and early-to-market Instant Recovery capability offer more frequent recovery points along with faster restore times within primary arrays. Reporting, an area of past customer concern, has just been enhanced by a new dashboard, overall management console and a Microsoft System Center plug-in. With its Connected and LiveVault cloud backup solutions, HP now protects 15PB of customer data in the HP cloud, in addition to selling the products as on-premises software. Today, HP largely sells its backup products to its installed base for other products, limited by market awareness and sales execution; however, the new product enhancements make HP more attractive for heterogeneous environments.

Strengths

Enhanced snapshot and replication support and vastly improved reporting should resonate with industry demands.

Customers generally enjoy the simpler and less expensive pricing model for Data Protector, compared with offerings from competitors.

HP's SAP support (depth and breadth) remains perhaps the best in the industry.

Cautions

Gartner research shows that a significant proportion of HP backup production customers are several code releases behind and/or not exploiting the latest features, so validation of recent scalability and stability increases and the more-advanced functions should be sought.

VM Instant Recovery requires an agent when used with non-HP storage arrays.

HP can be perceived as having a high maintenance percentage, as it charges on a percentage of net versus list pricing.

IBM

IBM's Tivoli Storage Manager (TSM) offers very broad platform support across many OSs, file systems and applications. IBM has over 23,000, predominantly large enterprise customers for TSM, and has partnerships with MSPs to offer recovery services. While IBM has leveraged its large direct sales force, the portfolio generates the majority of its revenue from worldwide business partners. Customers cite the portfolio's ability to scale to handle very large recovery requirements, and the vendor's service and support continue to receive high marks. Through its acquisition of Butterfly Software, IBM now claims to have profiled over 2,000PB of backup environments running competitive solutions, and states that, overall, TSM has demonstrated 53% lower total cost of ownership (TCO) over the competition. IBM is getting more vocal with its marketing and messaging, and has expanded its licensing options, offering processor value unit (PVU) and back-end terabyte capacity licensing method, and is in beta now with a front-end terabyte scheme that will be offered later in 2014.

In the latest version 7 release, TSM increased scalability with up to 10x improvement of daily ingest of deduplicated and replicated data. The IBM Tivoli Storage FlashCopy Manager snapshot support that

included IBM and NetApp has been enhanced to support EMC VNX, Symmetrix VMAX and Symmetrix DMX, and IBM has a road map for broadening its third-party array support. TSM for Virtual Environments has been extended to offer much more capability, including VM instant access and restore, as well as item-level recovery for Exchange and SQL Server. In 2Q14, a new product was released, TSM Entry, which protects up to 50 Windows and Linux servers. While TSM offers many compelling benefits, the perceived administrative challenge of managing the product has been an issue for many years; however, the TSM Operations Center GUI, released in 2Q13, has a multirelease plan to offer more modern management capabilities, with the third release planned for later this year.

Strengths

A major market share player, IBM TSM offers midsize to large enterprise end-to-end recovery capabilities, from a single machine to the largest enterprises.

TSM offers well-proven incremental-forever backup processing, comprehensive policy-based management, and a broad set of no-charge data reduction and reporting features.

Customers and references cite the portfolio's scalability, code quality and solid support staff as major reasons for choosing, and remaining with, the solution.

Cautions

While recent references cite improvements, the length of time to fully address the need for a refreshed management console has been a concern.

Low understanding and exploitation of many recent features, combined with a large portion of the installed base running old versions of the products, have led customers to switch to other products.

Prospects and customers express a desire for EMC Data Domain Boost integration.

Symantec

Symantec has two main backup product lines: NetBackup and Backup Exec, with an associated set of integrated backup appliances, the NetBackup 5200 series and the Backup Exec 3600. NetBackup is the single largest revenue-producing product in Symantec's portfolio and in the overall backup software market. Symantec claims over 2 million organizations use its backup solutions. These product lines leverage some shared code, but utilize different user interfaces and scheduling and management constructs, and target different markets (SMB and large enterprise). The products are targeted at two different audiences: NetBackup at the enterprise and Backup Exec at the SMB and ROBO markets; however, there has been recent code sharing around deduplication, virtualization, Microsoft Windows, Exchange, SharePoint, SQL Server and the OpenStorage (OST) API for third-party target appliance support. Although over a year late in releasing version 7.6, NetBackup remains a very feature-rich and scalable solution. New capabilities include the ability to catalog individual objects of VM applications from a single VM image backup, the ability to provide instant recovery of 10 VMs in less than 10 minutes and further improvements to its Accelerator feature that offers high-speed backup with minimal data transfer. Customers cite the Auto Image Replication (AIR) ability to replicate backup data and the backup metadata to another location for instant failover and DR as a particularly compelling feature. Backup Exec, by contrast, has had a much more difficult time since the release of Backup Exec 2012, which resulted in interface, job scheduling, and application and OS currency issues. In June 2014, a new version of Backup Exec was released to address these items.

The Symantec executive team and top leadership in the backup organization have seen continued turnover, starting in 2012 and continuing into 2014. During this time, product support and issues with renewals were also concerns. These issues, along with past product quality and delays, have resulted in six years of share declines. Having weathered a challenging 2013, feedback for NetBackup version 7.6 has been very favorable, and if the 2014 updates to Backup Exec and its appliances come to fruition, Symantec should be in an improved product position.

Strengths

The NetBackup Accelerator feature, first delivered in version 7.5 in 2012, reduces backup windows, and has been enhanced in version 7.6 to provide for very fast, space-efficient backups that do not require any postprocessing roll-up of incremental backups to constitute a new full backup image.

Server virtualization support for VMware and Hyper-V offers very robust VM support, with a number of industry-exclusive features and capabilities.

The Net Backup appliances have addressed many of the deduplication implementation issues of the software-only implementation, and have been well-received by customers needing to refresh aged media servers or add additional media servers.

Cautions

Customers and prospects have been challenged by NetBackup and Backup Exec product delays, and have had to wait a long time for new application and OS support.

Customers have expressed concerns about the continued company and backup executive team turnover. This has resulted in their needing to augment the products with other backup solutions or to consider other vendors.

NetBackup Replication Director, launched in 2012 in version 7.5 and extended in version 7.6, still has comparatively limited storage array support (NetApp only).

Unitrends

A privately held company that has been around for over two decades, Unitrends has become more visible in the past two years, growing its installed base to over 10,000 customers (including 3,000 from the PHD Virtual acquisition). Unitrends targets mainly the midmarket with a series of integrated Recovery-Series backup appliances, which are also sold as software-only virtual appliance solutions called Unitrends Enterprise Backup. The vendor also offers cloud backup to its own data center. With the December 2013 PHD Virtual acquisition, Unitrends acquired two products: a VM-specific backup product, which has been renamed Unitrends Virtual Backup, and ReliableDR, an automated DR orchestration and testing tool, which is now integrated with both backup products, offering customers site recovery capabilities for private cloud and Unitrends' cloud deployments.

Unitrends' all-in-one appliances can support a wide range of operating environments and applications with comprehensive functions, and can scale up to 500 physical servers and 5,000 VMs (VMware and Hyper-V) per appliance. Multiple appliances, including those dispersed geographically, can be managed

with a single user interface. Unitrends also provides postprocess, content-aware, byte-level deduplication on the target side. Unitrends Virtual Backup targets IT generalists in smaller environments with easier agentless management and a centralized Web interface across VMware, Hyper-V and XenServer.

Strengths

Unitrends Recovery-Series appliances and Unitrends Enterprise Backup software offer comprehensive features, and the integration with ReliableDR offers additional DR capabilities.

The vendor's backup products have been well-tested in the field with over 10,000 customers.

Customers like the all-in-one licensing and centralized management of multiple appliances, including those dispersed geographically.

Cautions

Although Unitrends is currently committed to continued development of Unitrends Virtual Backup, customers and prospects should nevertheless check on its road maps before renewal and purchase.

Unitrends offers only NAS backup over NFS or CIFS.

The vendor's backup products do not support array-based snapshots.

Veeam Software

Veeam Software has achieved high brand awareness in the backup industry as a result of its successful sales and marketing of its simple, reliable and often innovative VM backup solution. As the sixth largest backup software vendor in 2013, the Veeam continued to grow its enterprise footprint, reporting that 94% of large global enterprises are its customers for at least some portion of their backup requirements.

Veeam Backup & Replication is an image-based backup and replication tool that supports incremental-forever, periodic synthetic full backups. It was the first VM backup solution that combines backup and replication and embeds deduplication. Some of its advanced functions (such as Instant VM Recovery, Hyper-V changed block tracking, recoverability validation and VM virtual labs) remain competitive or unique, although competitors are catching up. In the past year, Veeam launched version 7, which added WAN acceleration, backup from HP StoreVirtual Storage and HP 3PAR StorServe Storage array snapshots, tape support, and virtual lab capabilities for replicas.

Strengths

Veeam continues to grow fast, reducing customer concern about its viability.

Many customers like the combined backup and replication functionalities in one product for different levels of data protection.

Customers comment favorably on general code reliability, agentless granular restores and ease of much reduced management time.

Cautions

Major backup vendors are catching up in different degrees in the VM support capabilities, putting more pressure on Veeam.

The vendor does not offer physical server backup, and its VM backup is limited to VMware and Hyper-V environments.

For some large enterprises, the limited capabilities in terms of tape support and the lack of NAS support are concerns.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor's appearance in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

Barracuda Networks and Unitrends are two new vendors to this Magic Quadrant. Gartner has been seeing a steady rise in client inquiry and deployment of these integrated backup appliances in midsize and large enterprises.

Note that the previous vendor name of Syncsort is now Catalogic Software, the name of the company that has spun out of Syncsort and includes all of the storage management software solutions; however, this does not represent an addition to this Magic Quadrant.

Dropped

NetApp does not support heterogeneous environments with its own intellectual property for its Clustered Data Ontap, and uses SnapProtect, which contains OEM components from CommVault, for this environment.

Inclusion and Exclusion Criteria

In an attempt to ensure that the most market-relevant solutions were covered in this Magic Quadrant, the following 13 criteria needed to be met at the time that initial research and survey work commenced in order for a vendor to be included in the 2014 Magic Quadrant for Enterprise Backup Software and Integrated Appliances are:

1. The vendor's portfolio must possess the capability to capture data directly and not solely rely on other third-party and/or partner means of data capture/ingestion. In short, the vendor must own heterogeneous backup software capabilities.
2. The vendor must possess some form of a backup catalog to track the protected (backed up) data and potentially the many resulting copies of that data.
3. The solution must support files and multiple applications on Windows and either Linux or one or more Unix OSs (AIX, HP-UX, Solaris) in a physical and/or a virtual deployment supporting both

VMware and Hyper-V.

4. The solution must natively support writing data to disk targets, and optionally support writing to a physical tape and/or a cloud destination.
5. The solution must be available for purchase as an on-premises owned/licensed program product and/or integrated backup appliance, and not available only as a SaaS solution.
6. The vendor must achieve greater than \$25 million in annual new license backup software and license backup software maintenance revenue.
7. The vendor should have a growing base of customers and be actively expanding in the large enterprise backup/recovery software market.
8. The vendor must have a disk-based backup/recovery software solution commercially available for at least one calendar year, and have at least 10 active references using the solution in a production scenario to protect heterogeneous (Windows and either Linux or one or more Unix OSs) systems in a physical and/or a server virtualized environment.
9. The vendor must actively market its branded backup/recovery products in at least two major regions (for example, North America and Europe, EMEA, or Japan and the Asia/Pacific region).
10. If a vendor offers an integrated appliance (an appliance that contains the backup application's master and/or media server components), this packaging and delivery model is accounted for in this evaluation. Note that for consideration, the same vendor that provides the backup software must be the brand and point of service for the integrated appliance. This rules out third-party and/or meet-in-the-channel arrangements for consideration as an integrated appliance.
11. The provider must be the originator of the required capabilities and meet all of the above requirements via intellectual property that it owns, and not rely exclusively on third-party solutions to meet these criteria.
12. New emerging vendors should have significant market awareness among midsize and large enterprises, indicated by the number of unique Gartner client searches from Gartner's search analytics in the last 12 months.
13. The vendor must have briefed Gartner on its backup/recovery product within the last six months of the beginning of the Magic Quadrant activity, and will have provided the required items and references per this Magic Quadrant's schedule.

Vendors were excluded if:

The backup/recovery products do not appear in the competitive shortlists of Gartner's enterprise end-user organization clients.

The backup/recovery solution is delivered exclusively as an appliance, with no native backup application embedded in the solution.

The backup/recovery solution is delivered exclusively as a managed service.

We wish to emphasize two important criteria items:

Per inclusion criteria No. 4, to be eligible for this Magic Quadrant, a vendor must offer an enterprise backup/recovery software product, and not deliver only a disk target device. This was done to exclude those vendors that solely deliver a VTL and other disk-based backup appliances, but do not possess a backup application. Gartner is launching a new Magic Quadrant for Deduplication Backup Target Appliances that will cover deduplicating disk target devices to which backup software can write data.

While supporting physical tape devices is a valuable capability, tape support is not a requirement for this Magic Quadrant.

Gartner will continue to cover emerging vendors or vendors that do not yet meet the above inclusion criteria. Notable vendors that Gartner tracks include native OS and/or hypervisor providers, such as Microsoft with its Data Protection Manager, and VMware with its vSphere Data Protection solution, which is largely based on EMC's Avamar backup technology.

Evaluation Criteria

Ability to Execute

Gartner analysts evaluate technology providers on the quality and efficacy of the processes, systems, methods or procedures that enable IT provider performance to be competitive, efficient and effective, and to positively impact revenue, retention and reputation. Ultimately, technology providers are judged on their ability and success in capitalizing on their vision:

Product/Service is the evaluation of how well a vendor does in building and effectively delivering the solution that the market wants and perceives as being worthy of new investments in — ideally resulting in a three- to five-year strategy based on the vendor's portfolio (versus tactical or point product usage).

Overall Viability is important because backup solutions are considered strategic and organizations do not want to change offerings frequently. Viability is in relation to commitment to the backup portfolio, not the overall vendor, unless the vendor sells only backup solutions. Company viability, which equates to risk for the buyer, is something that data center professionals tell Gartner is important to them.

Sales Execution/Pricing also includes the transparency of pricing, including line item and list pricing in a bid.

Market Responsiveness/Record heavily considers the provider's three-year history of responsiveness in meeting or even being ahead of the market.

Marketing Execution directly leads to unaided awareness (Gartner end users mentioned the vendor without being prompted) and a vendor's ability to be considered by the marketplace. Gartner's end-user client search analytics results are also factored in as a demonstration of vendor awareness and interest.

Customer Experience is a very heavily weighted criterion this year, as data center professionals tell Gartner that they are evaluating vendors more and more on this capability. Because many products can now satisfy technical requirements, differences in product support take on greater importance.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	High
Overall Viability	High
Sales Execution/Pricing	High
Market Responsiveness/Record	High
Marketing Execution	High
Customer Experience	High
Operations	No Rating

Source: Gartner (June 2014)

Completeness of Vision

Gartner analysts evaluate technology providers on their ability to convincingly articulate logical statements about current and future market direction, innovation, customer needs, and competitive forces, and how well they map to the Gartner position of the future of backup and recovery. Ultimately, technology providers are rated on their understanding of how market forces can be exploited to create opportunity for the provider:

For Market Understanding, the more visionary vendors not only can observe the customers' wants, but also can enhance those wants with their added vision, and can potentially even shape or move the market in either a new direction or accelerate market activity and trends.

Marketing Strategy relates to what vendor and backup solution message is described, how that message is communicated, what vehicles are used to effectively deliver it, and how well the buying public resonates with and remembers the message. In a market where many vendors and/or products can sound the same, or sometimes not even be known, message differentiation and overall awareness are vital.

Sales Strategy is the ability for the sales team to effectively and clearly communicate the current capabilities, along with the future vision and road map, while also positively differentiating the vendors' offerings from the competition and alternative approaches.

For Offering (Product) Strategy, the vendor's offering needs to be capable of not only meeting the current and future tasks, but also must be easily configured and managed so that the capability of the product is easily exploited. The product should also be extensible, such that today's investments can easily be leveraged in the future. Vendors that deliver function ahead of the market, or influence the industry, will be deemed to have a superior product offering.

Innovation especially includes the recent past (the last three years) track record for innovation and current customer production exploitation of new capabilities, as well as the near-term (less than 12 months) upcoming feature set, along with the longer-term (three to five years) road map.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	High
Marketing Strategy	High
Sales Strategy	High
Offering (Product) Strategy	High
Business Model	No Rating
Vertical/Industry Strategy	No Rating
Innovation	High
Geographic Strategy	No Rating

Source: Gartner (June 2014)

Quadrant Descriptions

Leaders

Leaders have the highest combined measures of Ability to Execute and Completeness of Vision. They have the most comprehensive and scalable product portfolios. They have a proven track record of financial performance and established market presence. For vision, they are perceived in the industry as thought leaders, and have well-articulated plans for enhancing recovery capabilities, improving ease of deployment and administration, and increasing their scalability and product breadth. A fundamental sea change is slowly occurring in the recovery market. For vendors to have long-term success, they must plan to address the legacy requirements of traditional backup and recovery, while looking to expand their integration with and exploitation of snapshot and replication technologies. A cornerstone for Leaders is the ability to articulate how new requirements will be addressed as part of their vision for recovery management. As a group, Leaders can be expected to be considered part of most new purchase proposals and have high success rates in winning new business. This does not mean, however, that a large market share alone is a primary indicator of a Leader. Leaders are strategic vendors, well-positioned for the future.

Challengers

Challengers can execute today, but they have a more limited vision than Leaders, or they have yet to

fully bring to market, through product and marketing, their vision. They have capable products and can perform well for many enterprises. These vendors have the financial and market resources and capabilities to potentially become Leaders, but the important question is whether they understand the market trends and market requirements to succeed tomorrow, and whether they can sustain their momentum. A Challenger may have a robust backup portfolio, but has not yet been able to expand its market share, or does not have the same ability as Leaders to influence end-user expectations. These vendors may not devote sufficient development resources to delivering products with broad market appeal and leadership features in a timely manner.

Visionaries

Visionaries are forward-thinking, advancing their portfolio capabilities ahead of the market, but their overall execution (often scalability or breadth of functionality and/or platform support) has not propelled them into Challengers or possibly Leaders. These vendors are differentiated by product innovation and perceived customer benefits, but they have not achieved solution completeness or the broad sales, marketing and mind share success required to give them the high visibility of Leaders. Some vendors move out of the Visionaries Quadrant and into the Niche Players Quadrant, because their technology is no longer visionary (the competition caught up to them) and/or they have not been able to establish a market presence that justifies moving up to the Challengers Quadrant, or even remaining in the Visionaries Quadrant.

Niche Players

Niche Players are specifically and consciously focused on a subsegment of the overall market, or they offer relatively broad capabilities without the overall success of competitors in other quadrants. In several cases, Niche Players are very strong in the midsize enterprise segment, and they also opportunistically sell to the large enterprises, but with offerings and overall services that, at present, are not as complete as other vendors focused on the large enterprise market. Niche Players may focus on a specific vertical market or a focused recovery use case of the market and service it well, or they may simply have modest horizons and/or lower overall capabilities, compared with competitors. Other Niche Player vendors are too new to the market or have fallen behind, and, although worth watching, have yet to develop complete functionality or the Ability to Execute.

Context

Backup and recovery is one of the oldest and most frequently performed operations in the data center. Despite the long timeline associated with backup, the practice has undergone a number of changes (such as new recovery techniques and a new, expanded set of vendors to consider) and challenges, such as how to protect server-virtualized environments, very large databases, remote offices, and desktops, and laptops. Gartner end-user inquiry call volume regarding backup has been rising by about 20% each year for the past six years. Organizations worldwide are seeking ways to easily, quickly and cost-effectively ensure that their data is appropriately protected. Organizations are also voicing the opinion that backup needs to improve a lot, not just a little. The rising frustration with backup implies that the data protection approaches of the past may no longer suffice in meeting current — much less future — recovery requirements. As such, many companies are willing to adopt new technologies and products from new vendors, and they have shown an increased willingness to augment or even completely switch backup/recovery providers to better meet their increasing service-level needs.

Market Overview

For years now, many organizations have continued to rearchitect their backups in an effort to modernize their approach to handle new data types, increase workload volumes, and improve backup and restore times to meet rising SLAs. Disk-based solutions (including backup directly to disk and perhaps additionally to a cloud target, array-based snapshot and replication exploitation, server virtualization backup features and leveraging deduplication technology) are among the key items being sought. Ease of deployment with a rapid time to value and a greater ease of daily administration are key requirements. Mission-critical workloads are increasingly being deployed in server-virtualized environments, making VMware backup a mainstream requirement with Microsoft Hyper-V support increasing in interest. The scope of enterprise backup has expanded to sometimes include ROBO locations, as well as desktop, laptop and tablet protection, particularly for key company executives. Gartner sees that many organizations are willing to deploy multiple backup solutions in an attempt to best match the needs of what is being protected (endpoints, remote office, VMs, SharePoint, etc.), to contain product costs, and/or to implement a solution that the staff will find easy to use.

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