Magic Quadrant for Enterprise Backup/Recovery Software

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VIEW SUMMARY

Backup is among the oldest, most performed tasks in IT. The industry continues to undergo significant change as organizations embrace new technologies and techniques and show a propensity to augment or switch legacy vendors and backup techniques.

Market Definition/Description

This document was revised on 7 June 2013. The document you are viewing is the corrected version. For more information, see the Corrections page on gartner.com.

A vendor profile in this research is not entirely product-specific, but rather represents the vendor's overall position in the enterprise backup/recovery software market. The emphasis of this Magic Quadrant research is on backup/recovery software (that is, backup applications). For vendors that meet the inclusion criteria (weighted heavily toward backup application software capabilities), we evaluated their entire backup/recovery software and hardware portfolio. However, hardware solutions and partner products were given a lower weighting in an attempt to focus on the vendor's own backup/recovery software and intellectual property. This research emphasizes disk-based backup and server backup, although tape backup and endpoint backup will be factored into the comprehensiveness of the vendor's data protection portfolio and capabilities. Although Gartner believes that the appliance packaging option is often attractive for storage, particularly for backup use cases, this research is not focused on backup appliances (see "Storage Appliances May Transcend IT Silos and Incur High Cost at Scale").

The Magic Quadrant for Enterprise Backup/Recovery Software presents the next step in the evolution of backup, which incorporates new products, solutions and techniques for protecting, backing up and recovering desktop, laptop, physical server and virtual server files, applications and system images. These backup products provide features such as traditional backup to tape, backup to conventional disk, backup to the cloud, data reduction (compression and deduplication), snapshot, heterogeneous replication, continuous data protection (CDP) and/or virtual tape library (VTL) support, among other capabilities.

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. Many organizations understand the value of backing up critical data via multiple methods. Many of these vendors profiled here would have been considered nontraditional suppliers of recovery solutions only a few years ago.

Gartner has responded to the changing enterprise backup/recovery landscape with a more comprehensive evaluation tool that better reflects the current and evolving state of the market. While the origins of this Magic Quadrant are in tape-based backup application software, we also consider vendors that produce backup software and potentially a complementary backup/recovery hardware portfolio. A vendor no longer must possess tape capabilities to be included. However, vendors that do not possess a broad-based and heterogeneous backup application (for example, a Windows-only or a single hypervisor virtual machine [VM]-only solution) and that deliver only disk-based backup appliances were not eligible for inclusion in this Magic Quadrant. It also excludes backup software for a homogeneous environment, such as native tools from Microsoft or VMware for their own specific platforms, as many enterprise customers prefer a single, scalable backup product for a heterogeneous environment. Other solutions for more-specific backup use cases, such as pure-play endpoint, cloud or appliance solutions for backup, are also not included in this research.

As the backup/recovery software market comprises several dozens, if not hundreds, of vendors, this report narrows it down to those that have strong presence in large-enterprise environments, in part measured by Gartner search analytics and Gartner end-user inquiry.

Methodology

Placement on the Magic Quadrant is heavily influenced by more than 1,000 conversations conducted annually with Gartner clients on the topic of backup and recovery. In addition, the Magic Quadrant methodology includes a comprehensive vendor survey; several in-depth vendor briefings regarding product, portfolio, strategy and messaging; and the solicitation of three or more references from each vendor for interviews and up to seven references for electronic surveys. Gartner also utilizes worldwide end-user surveys, Gartner conference kiosk surveys, Gartner conference session polling data, and many one-on-one conversations and backup roundtable discussions from these conferences. From these and other data sources, we learn how customers are using the vendor's solutions and how prospects could potentially benefit from them, and we are also able to determine the strengths and cautions of the offering from each provider. We learn about experiences with sales and support, acquisition and maintenance pricing, and opinions on vendor responsiveness to aspects such as requests for enhancements.

STRATEGIC PLANNING ASSUMPTIONS

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

By the end of 2016, 40% of large enterprises, up from 20% at year-end 2012, will have eliminated tape for operational recovery.

Between 2012 and 2016, one-third of organizations will change backup vendors due to frustration over cost, complexity and/or capability.

By 2016, at least 20% of large enterprises will abandon backup/recovery solutions using a traditional methodology and adopt those that employ only snapshot and replication techniques, up from less than 7% today.

EVALUATION CRITERIA DEFINITIONS

Ability to Execute

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

Overall Viability (Business Unit, Financial, Strategy, Organization): 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 and Track 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 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 and SLAs.

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.
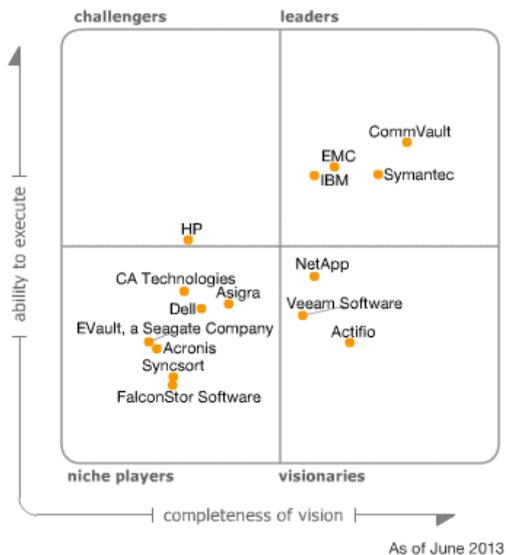
Completeness of Vision

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

It is important to remember that the Magic Quadrant does not solely rate product quality or capabilities and features. A Magic Quadrant is not just about a vendor's product(s); it is a scenario chart that maps a vendor's overall position in a specific market. While the product portfolio is an important part of the rating, the vendor's ability to acquire customers and expand its presence in the market is also important, as is its ability to grow product and service revenue. A vendor that offers a strong, technically elegant product, but is unable or unwilling to invest in marketing and sales to increase revenue and improve profitability, will find itself unable to invest in future development.

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Magic Quadrant

Figure 1. Magic Quadrant for Enterprise Backup/Recovery Software

Source: Gartner (June 2013)

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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 communications 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 preemptive 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.

Vendor Strengths and Cautions

Acronis

Acronis sells its backup products mostly to small or midsize businesses (SMBs) through channel distribution in 90 countries and has more than 200 OEM partners. Its website targets mostly consumers and small office/home office customers. In 2012, Acronis strengthened its investment for the enterprise by establishing enterprise-oriented sales and marketing teams in Europe and North America and, as a result, increased its number of enterprise customers. The company claims that, among its more than 200,000 business customers, 2,000 have 1,000 or more employees. Acronis acquired GroupLogic in 2012 for its secure mobile access and file sync and share capabilities to broaden its portfolio with enhanced Apple Macintosh protection.

Acronis has two backup products for SMBs: Acronis Backup & Recovery (ABR) Advanced Platform and vmProtect. ABR Advanced Platform is a combined image and file backup product that supports both physical and virtual servers with client- and target-side deduplication and agents for granular restores of applications. vmProtect is an image-based, disk-only backup solution specifically designed for the VMware environment (up to 100 VMs), without the need for guest OS agents. vmProtect can be installed as a virtual appliance. In 2012, vmProtect added new functions, such as single-pass backup of Microsoft Exchange and SQL Server, with granular restore to the individual message or cell level. Currently, vmProtect has more VM-specific functions than ABR does, including built-in replication, ESXi bare-metal restore (BMR), the ability to run a VM from a backup image, incremental forever, and changed block tracking (CBT)-based restore. However, Acronis is working on adding those functions to ABR.

Acronis also has an online cloud backup offering, with three data centers in the U.S. and France. The subscription-based online service is integrated with both ABR and vmProtect, which provide local disk staging of file and image backup for faster system recovery. Local backup is replicated to Acronis' data centers for disaster recovery (DR). Acronis' online services target SMBs planning to eliminate tape vaulting services. Acronis introduced a vmFlashBack function with vmProtect in 2012 and now offers VMware CBT-based incremental restore, which can enable faster online recovery.

Strengths

Image backup and BMR are robust and widely used.

For a relatively small VMware environment, Acronis offers solid VM backup/recovery capabilities, including faster restore via vmFlashBack and instant VM mounting for recovery.

Customers cite the user interface of ABR version 11 as being intuitive and easy to use.

Cautions

Acronis' backup products lack scalability for large enterprises and are mostly adopted by SMBs or by departments in an enterprise.

The current version of ABR lacks many VM protection features available with vmProtect.

Some customers cite an inadequate knowledgebase of Level 1 support staff and a relatively slow support process.

Actifio

Founded in 2009 near Boston, Actifio is an emerging vendor that offers an innovative data protection architecture for midsize to large enterprises and service providers. Its architecture is disruptive to the traditional backup/recovery methodology. Marketing itself as a "copy data management" company, Actifio aims to consolidate traditionally siloed repositories for backup, snapshots, DR and test/development to reduce the amount of storage needed to manage various data copies. Actifio has raised $107.5 million in venture capital funding, the latest being $50 million in March 2013, to support its fast growth. Actifio has more than 200 employees and more than 300 installations as of March 2013. About 30% of its sales in 2012 were to cloud services providers and managed service providers (MSPs), including IBM Global Services, SunGard, Time Warner-NaviSite and NEC. Its product is sold through channel partners, such as Arrow in the U.S. and Tech Data in EMEA. Gartner includes Actifio in this year's Magic Quadrant mainly due to its disruptive innovations, heightened awareness among Gartner user clients and fast revenue growth, although from a small base.

Unlike many traditional backup solutions that were designed for tape, Actifio's Copy Data Storage (CDS) platform, launched in November 2010, is a modern design that significantly leverages disk-based technologies, such as deduplication, snapshot, replication, mounting, cloning, storage tiering and storage virtualization. CDS uses its patented Virtual Data Pipeline technology to eliminate redundant data traffic over the network (such as duplicated data between DR replication and backup). It stores a globally deduplicated "golden copy," which can be used for multiple purposes, such as for backup, DR or test/development. As a result, CDS can replace products that have been sold or licensed separately, such as enterprise backup solutions, remote replication/CDP, array-based snapshots and cloning. Data capture and movement can be configured in band or out of band. The in-band deployment leverages licensed IBM SAN Volume Controller (SVC) technology to provide a Fibre Channel interface to a wide range of host OS platforms and applications. The out-of-band configuration interfaces hosts via Internet Small Computer System Interface (iSCSI) or captures application-consistent snapshots via host-side APIs, such as VMware vStorage APIs, Oracle Recovery Manager and Microsoft VSS, as well as its own connectors for physical servers and file systems. Out-of-band deployments are the most popular today, as many enterprise customers are reluctant to deploy an emerging product in the data path in their production environment, although some customers have found comfort in the fact that SVC's host interoperability is well-tested in the field. Snapshot data is globally deduplicated and compressed before being written to the CDS appliance disks. Recovery is available in three modes: mounting (for instant VM or file recovery), cloning (for test/development or e-discovery) and restore (for recovering an entire server or application to a valid state). Actifio's CDS' graphical user interface (GUI) is designed with drastic simplicity. Administrators configure by entering recovery point objective (RPO) and recovery time objective (RTO) SLAs and retention policies, and the system automates the detailed process in the background.

Strengths

Actifio consolidates traditionally separate backup and DR processes into a single process and repository, with capabilities such as instant recovery and centralized global deduplication.

Customers have highly automated, simple GUI experiences, with configurations based on application SLAs for RPOs and RTOs, as well as multitenancy, self-service and role-based management functions.

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

Cautions

Actifio is working to add more out-of-band capabilities, such as support of Unix platforms, Hyper-V, Kernel-based Virtual Machine (KVM), SAP and network-attached storage (NAS).

Actifio does not have a master catalog today; end-user recovery of individual files could be challenging as it requires a mount and search.

Actifio's tape-out capability is fairly new, leveraging open-source Amanda's catalog. Today, tape is not yet an option under its SLA policies.

Asigra

Asigra has been providing multitenant backup and recovery solutions designed for MSPs since its inception in 1986 and currently has more than 600 partners that offer it as their own relabeled software as a service (SaaS) solution. However, today almost half of its customers implement Asigra within their own data centers as a private cloud. Asigra claims that close to 1 million global sites are now protected with its backup solution. Initially designed as a remote service, the product has a long history of incorporating data reduction technology. As such, Asigra was one of the first backup solutions to deliver block-level incremental (BLI) forever processing, whereby only new and changed blocks of data need to be transmitted. It also utilizes compression and global deduplication to further reduce network traffic and reduce backup capacity.

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. DS-Clients support remote offices and branch offices (ROBOs), desktops, virtual environments, and laptops and tablets by aggregating data to DS-System servers. Asigra is quick to respond to market trends, notably with its support for incremental forever-backup processing, CDP, virtual environment support, Federal Information Processing Standard (FIPS) 140-2 certification, NetApp snapshot integration, endpoint backup capabilities and salesforce.com support. Asigra was the first (and remains the only) backup solution included in IBM's SmartCloud offering. In addition to NetApp, Asigra also supports snapshot and replication management for arrays built on Symantec's Veritas Storage Foundation (such as Huawei), with additional arrays planned for future releases. Asigra now offers Virtual Disaster Recovery (VDR) to run a VM from the Asigra

backup repository to continue production operations. Autonomic healing and restore validation are offered via 30 integrity checks that can request a new copy of the file or alert an administrator if there is no longer a valid copy to be obtained.

Asigra started supporting virtual environments years before some other backup software providers. At the time, there were no backup APIs available from server virtualization vendors, so Asigra used the native APIs from VMware, Hyper-V and Xen to provide support for VMs. Today, Asigra supports VMware through vStorage APIs for Data Protection (VADP), as well as through native APIs. Asigra states that its unique native API capability offers agentless backup for VMware Workstation, which is not supported by VMware's VADP API and also allows for greater granularity to the file/message level, although currently this requires a two-pass backup.

Asigra is not a household name to enterprise backup and IT staff, but it is well-known in the MSP community. The focus on new feature delivery, a scalable grid architecture and its secure agentless implementation have allowed Asigra to garner new end-user, OEM and MSP customers, but overall company awareness remains low in the enterprise.

Strengths

Low-touch, agentless architecture is available in physical and virtual environments.

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 certificate-of-data destruction.

Cautions

The administrative interface has become outdated and can be complex to manage, including its lack of centralized administration, causing some to write a wrapper interface around the administrative console; however, a redesign is in progress now, with a planned 2014 delivery.

For VMs, only crash-consistent backups, which would require scripting for log truncation, are offered.

Snapshot support does not offer cataloging of individual files.

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CA Technologies

CA Technologies has three backup/recovery software products under the ARCserve brand: ARCserve Backup, ARCserve D2D, and ARCserve Replication and High Availability (HA). The ARCserve Backup product enjoys widespread brand recognition for traditional tape backup in the SMB market and in some larger enterprises in international markets and is the most widely deployed among the three products. The ARCserve D2D and Replication and HA products target midsize customers, as well as MSPs and OEMs that do not need tape. The company claims to have about 50,000 customers with active maintenance. CA's backup/recovery software revenue declined slightly in 2012 partially as a result of CA's sales restructuring at the beginning of 2012. Recognizing the opportunities of helping existing tape backup customers to transition to the cloud backup model, CA has been investing in adding features appealing to MSPs and cloud storage providers, such as integration with third-party remote monitoring and remote management tools. Another focus area is to develop more OEM relationships.

ARCserve Backup is a traditional agent-based tape/disk backup product for Windows, Linux and Unix environments, with daily incremental and synthetic full capabilities. For the VMware environment, it also provides agentless host-based protection. ARCserve Backup offers in-line target deduplication and postprocess global deduplication capabilities at no additional cost. ARCserve D2D is an image-based, block-level infinite incremental (I2) snapshot backup, which provides hardware-independent BMR. The D2D's Virtual Standby function offers instant VM failover locally and remotely by converting image backups to bootable VMs. Lastly, ARCserve Replication and HA uses replication and CDP capabilities to protect business-critical applications and servers.

The latest version of ARCserve (r16.5) updated all three modules' support for Windows Server 2012 functions, such as NT File System (NTFS) deduplication and Resilient File System (ReFS) volumes, Storage Spaces, and Hyper-V 3.0 VMs. It also added the capability to do full-system HA failback with BMR to dissimilar hardware into physical or virtual environments, including cloud environments, such as Amazon EC2.

CA offers four pricing models: by front-end capacity, by the number of sockets, a la carte, and a bundle option (where the most popular features are bundled together). All four models are sold either as a perpetual license or monthly subscription.

Strengths

CA ARCserve offers a full range of data protection products. CA ARCserve Backup is a robust traditional backup product for the SMB market, while its D2D and Replication and HA products are also solid foundational technologies for traditional IT departments, MSPs and cloud providers.

Customers comment favorably on ARCserve D2D's capability to perform BMR to dissimilar hardware and its Virtual Standby function for fast VM failover.

CA ARCserve offers customers flexible, competitive pricing models to cater to different needs.

Cautions

Despite CA's overall presence in large enterprises, the ARCserve product family has been mostly deployed in the midmarket by SMBs and MSPs.

File-level and image-level backups and CDP/HA solutions are not fully integrated; each has its own management console.

ARCserve doesn't have source-side deduplication capabilities and doesn't support object-level granular restore for SQL Server running on VMs.

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. The company has effectively shifted to selling into the largest of enterprises and MSPs, while retaining its SMB channel through partners and resellers. CommVault has maintained a continued strong public presence in print and electronic advertising and in social media, resulting in being on the shortlist in almost all Gartner backup inquiry.

In version 10 of its Simpana software, CommVault has continued its solid growth by adding many new functions and capabilities, along with extending a perceived edge in ease of use and fewer scripting requirements, compared with other enterprise backup solutions. New workflow automation, dashboard and Web-based reporting features look to solidify this view. It delivers a well-integrated platform that was built from the ground up (no third-party acquisitions) on a common architecture. CommVault is now attempting to further leverage the copies of data that Simpana houses through its ContentStore capability to offer APIs into its backup and archive repository for data mining and analytics.

Of all the backup vendors on this Magic Quadrant, it is Gartner's opinion that CommVault continues to be the most vocal and articulate about the future of backup, shifting toward the exploitation and management of storage array and NAS replication and snapshots, seeking to serve as a manager of managers over a variety of backup and storage options from a central console. To support this vision, CommVault offers its IntelliSnap snapshot protection capability, which integrates with the industry's broadest number of storage platform solutions to schedule and manage snapshots, offering robust application support and cataloging of individual files and objects. CommVault has also been the most vocal vendor regarding the unification of backup, archive and e-discovery, being the only vendor to deliver a highly integrated solution that offers all these capabilities through a unified architecture.

Simpana 10 introduced several architectural updates, including a fourth-generation scalable and efficient software-based deduplication capability and remote viewing of backup and archive data on endpoint devices via its Edge component, Web console and natively though Outlook. Additionally, the company delivered OnePass for combined backup, archiving and indexing activities with a single process and a Data Classification Enabler function for tracking new and modified files, avoiding a full file system scan. Support for SharePoint 2013 was delivered ahead of the competition, and Changed Block Tracking (CBT) for restore of VMs will be delivered in a service pack in June 2013, previously an EMC exclusive.

CommVault historically derived approximately 20% of its backup revenue from its relationship with Dell, and it is the OEM for software to other companies, notably Hitachi Data Systems and NetApp. CommVault's sustained growth is likely to depend on the continued expansion and maturation of its large-enterprise sales force and continued developments with resellers, MSPs and partners both inside and outside the U.S. End-user feedback has been positive as CommVault expands into increasingly larger opportunities, including Fortune 100 companies, international service providers and new OEM engagements. The perception within IT organizations that CommVault is a storage software company that continues to deliver innovations ahead of the market continues to pay off for the vendor.

Strengths

Strengths include a unified architecture with a single administrative console and reporting engine for all backup, archiving and e-discovery 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.

It has a mature fourth-generation source and target-side deduplication capability, with the industry's only deduplication-to-tape support.

Cautions

Its instant VM recovery capabilities are not as complete as those of some competitors.

SQL Server in a VM requires postscripting for log truncation.

Some customers and prospects feel that the solution is becoming expensive at scale.

Dell

Starting from having no owned backup/recovery software products less than 18 months ago, Dell has become the sixth largest player in the backup/recovery software market in a short period of time with a complex portfolio, mostly as a result of its 2012 acquisitions. In February 2012, Dell acquired AppAssure, a Virginia-based private backup software vendor selling to the SMB market. The March 2012 acquisition of SonicWALL brought in a CDP product, and the September 2012 acquisition of Quest Software added two additional non-application-specific backup software products to Dell's data protection portfolio: NetVault (also known by the name of its previous owner, BakBone) and vRanger. The Quest acquisition also brought in two application-specific recovery products: LiteSpeed and Recovery Manager, which are not factored in for this Magic Quadrant.

In early 2013, Dell formed a data protection division, led by the former AppAssure CTO, who reports to the Dell Software Group. The new division oversees a combined business of 80,000 customers and a product portfolio, including the aforementioned software solutions, as well as backup/recovery appliances, such as the DR4000 (backup target using the acquired Ocarina deduplication technology) and the DL4000 (all-in-one backup/recovery appliances using AppAssure or CommVault software and Dell PowerVault hardware). In addition, Dell continues to act as an OEM and resell CommVault products to its large customers. As this report does not cover disk backup targets, the DR4000 is not considered for its technical capabilities, but rather for its value to broaden Dell's data protection portfolio.

Dell has laid out a vision to streamline its backup software portfolio and minimize overlaps by working on an abstraction layer for a common interface across its data protection products. However, it's still too early to tell how timely and effectively the vision will be executed. Currently, the company targets the predominantly Windows environment (physical and virtual) with AppAssure, which offers short RPOs and RTOs with its snapshots and replication capabilities and robust protection functions for Microsoft Exchange. AppAssure uses agents to perform object-level application recovery and offers recovery verification and "Live Recovery" for faster access to backup data. However, AppAssure only recently added Linux support and has limited penetration in the large enterprise. vRanger supports the VMware environment only and gained early market success among enterprise VM administrators, but it is facing stronger competition and has overlap with AppAssure. It has an agentless architecture for a dynamic virtual environment, with granular restore leveraging the Recovery Manager technology. AppAssure and vRanger are priced per socket/CPU for virtual environments and per server for physical backup. Both AppAssure and vRanger compete against Symantec's Backup Exec, Veeam and other products for the SMB market and usually don't show up in the vendor shortlist for large enterprises.

NetVault is a traditional file-based backup product. It targets the midmarket and is opportunistically sold to large enterprises, often with disruptively low pricing. Besides having higher scalability than AppAssure, NetVault supports many more OS platforms and applications and offers strong tape backup capabilities. Users have highlighted NetVault as being easy to use. Its FastRecover (CDP and associated deduplication technology) supports only the Windows platform. NetVault uses three pricing models: by front-end capacity, by bundle and a la carte.

Strengths

> Dell offers SMBs broad backup products, including VMware-specific backup, backup based on snapshots and replication, and traditional file-based backup, as well as all-in-one backup appliances and deduplication target appliances.

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

> For midmarket organizations with a mix of OS platforms, NetVault continues to be a solid backup solution, enhanced by its CDP option, FastRecover.

Cautions

> AppAssure and vRanger have overlaps. Prospects should inquire about their future road maps before acquiring.

> Rationalizing and integrating the different backup technologies that it acquired present many challenges to Dell, including product positioning problems for prospects and transition issues for existing customers.

> NetVault's source-side deduplication is available only through EMC's Data Domain Boost and Dell's DR 4x00 RDA today. NetVault also has limited support for target-side deduplication appliances, such as the NetVault SmartDisk, DR 4x00 and Data Domain.

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EMC

EMC's Backup Recovery Systems (BRS) division has been championing thought leadership efforts focused on backup modernization and redesign, and it now has a vision of bringing backup capabilities to the application administrator. EMC has become very good not only at leveraging its large backup division's sales team, but also at creating in-house linkages and sales opportunities with the industry's largest primary storage field sales force and the storage industry's most vocal marketing machine. EMC has been offering (but just formally announced) the EMC Data Protection Suite, which offers a flexible, capacity-based licensing model for the Avamar and NetWorker backup software components discussed below, along with its SourceOne archiving software and Data Protection Advisor management software.

EMC offers traditional software-based backup with NetWorker. NetWorker is a mature offering, originally built using a client/server architecture, which is evolving to support a variety of client-direct and EMC Data Domain Boost-enabled deployment models. NetWorker is extending its snapshot capabilities by adding configuration and management of EMC VMAX, VNX, Celerra and RecoverPoint integration from the NetWorker console. Also new in 2013 is a fast block-based backup capability, along with an enhanced file system scanning process for Linux and Unix to accelerate backup. In addition, NetWorker is delivering a complete refresh of its VMware protection solution, leveraging portions of Avamar technology.

Avamar, known for its source-side deduplication, is usually sold as a prepackaged appliance, the Avamar Data Store. Avamar has been scaling up to address the requirements of larger data centers with its strong support for VMware, file data, remote offices and desktops/laptops. Avamar has been adding to the data types that it can write to a Data Domain target device. EMC states that, by 3Q13, all data center workloads will be supported in this configuration, which is intended for large-enterprise deployments and is becoming increasingly deployed. Avamar support for Isilon NAS has been lacking and is expected to become available for the first time in 3Q13. Avamar will also provide 24/7 system availability for backups by eliminating system maintenance blackout windows — a frequent topic of customer concern. EMC is planning to add the ability to run Avamar backed-up VM instances directly from Data Domain storage for instant access and restore in 3Q13. Avamar and Data Domain Boost capabilities are becoming more tightly integrated and/or enhanced with and within NetWorker. A subset of the Avamar technology is used by VMware for its VMware Data Protection (VDP) products found in vSphere.

EMC's Avamar and NetWorker are the focus of this evaluation, but EMC offers Data Domain as a deduplicated backup target for both backup solutions. EMC's BRS portfolio also includes the Disk Library for mainframe and (as of 2013) the Mozy cloud-based backup offering. EMC's RecoverPoint, a heterogeneous replication solution that is increasingly being used for CDP, is also given some consideration in this evaluation. Various levels of integration are provided among the products, with a short- and long-term road map for additional unification and commonality of components and management. Although all EMC's offerings are intended to be able to be deployed as stand-alone, there is overlapping functionality among the products, but each product

release gradually collapses redundancies, with examples being common VM and Microsoft application support.

Key to EMC's success continues to be the ability to couple backup/recovery products more tightly for those seeking complete solutions, deeper and more heterogeneous support of snapshot and replication, and maintaining or even improving the level of customer support as its market penetration increases. Gartner does hear concerns regarding the length of time that tighter product integration, new features and easier management of many instances of the products are taking. However, EMC delivered a new Backup and Recovery Manager console that initially integrates monitoring of Avamar and NetWorker that will be extended for additional capabilities in the future. In June and July 2013, EMC plans to refresh NetWorker and Avamar, respectively, which will deliver a third phase of its integration improvements. While references and prospects sometimes tell Gartner that their EMC field representative cannot describe how and when the products will unite, EMC does indeed have a road map to continue converging the architecture of what are today several products — an effort that was started in 2010 and that EMC stated at the time would take several phases to deliver. While pricing concerns are cited by some customers and prospects, EMC reduced pricing for Avamar in 2012 and delivered the more competitively priced EMC Data Protection Suite mentioned above.

Strengths

> Avamar provides strong support with compelling capabilities for virtual environments, NAS, and remote-office and endpoint backup, which include speed of backup and restore operations.

> NetWorker has recently added integrated capabilities to manage snapshots for EMC VMAX, VNX, Celerra and RecoverPoint platforms.

> NetWorker is enhanced with code sharing of application and VMware support from Avamar and improved customer support, bringing updated capabilities to the large-enterprise scalability that NetWorker offers, allowing for new feature development.

Cautions

> References and Gartner clients report that support capabilities seem mixed at times.

> Customers seeking a fully unified solution need to get comfortable with EMC's recent and imminent points of integration and common management across the portfolio, while understanding that a fully integrated design is not yet available for all the software components and will unfold over time.

> Customers and prospects continue to express concerns over Avamar pricing, especially at scale.

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EVault, a Seagate Company

EVault has 16 years of cloud backup history and differentiates itself with its support of a wide range of OS platforms, including Unix and IBM iSeries, and owing a large number (12) of secure data centers in North America and Europe. Besides selling cloud backup services to user organizations, it is actively engaged in selling its services through MSPs, such as SunGard and Fujitsu. Less frequently, EVault's backup software is purchased by customers for their own on-premises deployment and usage. The company serves as an OEM for Datacastle's technology for endpoint backup. As more organizations started evaluating the value propositions of cloud backup in 2012, EVault increased its customer base by 23% to 43,000 in 2012, with strong growth in Europe. Today, 150PB of data is being managed at EVault data centers. However, most of its customers are using EVault services for a small environment, with typically fewer than 10 servers and less than 1TB of daily backup, although its on-premises customers can back up much larger environments. EVault has not introduced new technologies to scale up its services to meet the increasing cloud demand from midsize to large customers.

EVault's server backup architecture is agent-based "block delta forever" backup (after an initial full backup), with pointer-based virtual full backup in the cloud data center for fast restore. Data is further deduplicated in the data center to achieve an average of 20% additional space savings. All data is encrypted before leaving the client site and stays encrypted at EVault's data centers, with customers owning the encryption key. WAN optimization is also achieved through its patented "adaptive compression," which adjusts compression algorithms dynamically based on compressibility of the data and the client CPU and bandwidth resources. EVault also sells a virtual and physical appliance for customers to deploy at their site for faster recovery. EVault supports VMware environments with image-based backup leveraging VMware VADP API; the EVault Agent for vSphere provides file-level restore. Granular application restores require guest OS agents. The company also offers BMR as well as replication for the Windows environment, which is the base technology for the EVault Cloud Disaster Recovery Service, with guaranteed SLAs of up to four hours. More recent enhancements include the version 7 release, which features granular file recovery for VMware and support of SQL Server 2012. Granular restore for SharePoint was released in May 2013. EVault also launched all-in-one backup/recovery appliances with up to 48TB for on-premises deployments, with the option to replicate to another appliance or to the EVault cloud.

EVault has simplified a previously complex pricing structure with a capacity-based pricing model and has added a Web-based storefront to customers to try out for free. The company has different pricing models for its software sales and cloud services, such as cloud server backup (SaaS), endpoint protection, cloud DR and cloud email archiving. Cloud server backup is priced per capacity stored at EVault's data center, and its endpoint backup is priced at various tiers of capacity and depending on the number of devices protected.

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 than those of most competitors.

> EVault has many more data centers than most competitors, which provides an edge for wider 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 serves customers who have relatively small backup environments, with a few servers and a few terabytes of production data.

EVault has been relatively slow to add competitive functionality, such as single object restore from an application and support for new application versions.

Some customers desire a centralized GUI for monitoring and troubleshooting.

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FalconStor Software

FalconStor is often best-known in the enterprise backup world for its VTL software. During the last four years, the company has strived to expand into larger-enterprise sales, as well as targeting midmarket installations. FalconStor is transitioning from being a very OEM-dependent business to more of a direct supplier of recovery solutions. However, the company does continue VTL supplier arrangements with companies such as Hitachi Data Systems. FalconStor touts nearly 3,000 customers for all its backup and recovery products.

FalconStor is well-known in China as a solid provider for backup and is starting to become better-known in the U.S. and other geographies for its CDP solution and its heterogeneous snapshot/replication capabilities for physical and virtual servers. The company delivers these recovery solutions as installable software, a virtual appliance and as preconfigured hardware offerings, with plans to deliver a new series of remote-office, midmarket and enterprise appliances in 2013. For this Magic Quadrant, FalconStor's evaluation is largely based on its CDP portfolio; however, some consideration has been given to the VTL and file-level deduplication technologies.

FalconStor has continued to experience significant turnover at the executive level over the last two years. While many customers and prospects have raised concerns over the company's viability — given the turnover, financial performance and federal lawsuit issues — its legal challenges look to be resolved, and now, with the financial burden associated with this in the past, FalconStor can look to fund R&D efforts. That said, the company still hasn't delivered on its 1H11 announcement of a new product to integrate all recovery capabilities with a more service-oriented management console.

Users often praise the amount of recovery capabilities and the ease of managing the solution. FalconStor offers broad application integration through a single agent, an off-host VM snapshot function, and agentless backup for VMware environments. References note the ability to replicate local disks along with storage area network (SAN)data within the same process, offloading backup from production servers, quiescing multiple systems (metadata and production data, if housed separately), and fast restore speeds as key product features.

FalconStor's future focus will revolve around scalability by increasing the repository size; offering performance through enhanced deduplication and protection; and introducing an updated simplified console and improved reporting and analytics in support of larger-enterprise environments. While new sales seem to have slowed, if FalconStor can deliver on these capabilities, offer new packaging and product delivery options, and increase awareness and expanded routes to market, its core technology, which receives strong customer praise, should find greater adoption.

Strengths

Strengths include 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 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

Continued turnover within the company's management (high-level executives and sales directors) has meant that the company and product vision has taken more time to be realized.

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

There is no SharePoint protection, and CDP products lack tape support.

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HP

The Autonomy name, which was used in the previous iteration of this Magic Quadrant, is replaced with HP in this update, as HP has integrated Autonomy into its organization. This Magic Quadrant evaluates HP Data Protector, HP Autonomy LiveVault cloud server backup and HP Autonomy Connected Backup endpoint backup, although the emphasis is primarily on server backup. HP StoreOnce appliances are not evaluated for this Magic Quadrant; however, they are considered in the breadth of HP's data protection portfolio, and the StoreOnce deduplication technology is factored into the overall product-related ratings.

Data Protector is available globally from HP direct sales and a wide variety of HP partners and is often aggressively priced relative to other enterprise solutions. HP has been focusing on integrating Data Protector with StoreOnce deduplication technologies and appliances, as well as with its current flagship array 3PAR. It offers solid traditional backup and recovery functionality, such as synthetic full and virtual full backups. In the June 2013 release, HP revamped the Data

Protector server architecture to make it much more scalable (able to handle 1 trillion filenames). HP was early in delivering snapshot integration and automation via its Zero Downtime Backup and Instant Recovery capabilities, which support HP, EMC and NetApp storage array snapshot and replication. HP's internally developed deduplication technology — StoreOnce — is offered as part of Data Protector 7 and above for client- and server-side deduplication, as well as for what the company calls "Catalyst-based replication," an API that enables Data Protector to control movement of deduplicated data across the enterprise without the need for rehydration. Data Protector can move data from StoreOnce appliances to tape and manage appliance replication. Data Protector provides agent-based granular restore for Microsoft Exchange and SharePoint in physical and virtual environments.

HP has also started integration work between Data Protector and the Autonomy Intelligent Data Operating Layer (IDOL), a common information management platform for structured and unstructured information that provides conceptual understanding of information. With Data Protector 7's initial integration, IDOL can place a legal hold on a backup copy, index the backup dataset and provide search capabilities. Although IDOL can elevate backup datasets from inactive status to active use cases, HP will be challenged to translate value and benefit statements to traditional backup and recovery buyers.

HP inherited cloud backup solutions from Iron Mountain (whose digital assets were acquired by Autonomy), and LiveVault provides midsize organizations and ROBOs with WAN-optimized, deduplicated backup to the LiveVault cloud, as well as WAN-efficient delta restore. Its Connected services offer customers a cloud-based and on-premises endpoint backup solution with proven large scalability. Both LiveVault and Connected are integrated with IDOL for legal hold and contextual search. However, LiveVault needs to improve its scalability to meet larger customers' desire to leverage the cloud, and Connected also needs technology enhancements, such as near-CDP support and more granular block-level source-side deduplication (beyond its current file-based single-instance capability) to be more competitive in the market.

Strengths

HP customers can use the same StoreOnce code for source-side, server-side and target-side deduplication, without data hydration when performing data replication. Customers commented favorably on the deduplication ratio this technology offers.

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

HP has extensive experience providing cloud backup services with LiveVault and Connected and offers many secure cloud data centers across multiple geographies.

Cautions

Although Data Protector can manage StoreOnce appliances' replication and node failover, some customers cite their need for an integrated GUI with the same level of granular reporting.

LiveVault targets mostly small backup environments and is mostly adopted for the Windows environment.

For customers who are looking for an integration solution for both on-premises and cloud backup, Data Protector's integration with LiveVault cloud backup is still a work in progress and has limited capabilities.

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IBM

IBM's Tivoli Storage Manager (TSM) offers very broad platform support across many OSs, file systems and applications; was the first to offer SAP Hana protection; and has an embedded backup agent inside DB2 and Netezza, as well as in the IBM Scale Out Network Attached Storage (SONAS) and Storwize storage platforms.

While TSM offers many compelling benefits, the perceived administrative challenge of managing the product remains an issue year after year, despite attempts at wizards, new administrative uplifts and a number of reporting engines. While the industry has largely adopted a backup approach that is similar in nature, and even after rewrites and much improvement, the perception is still that TSM is more challenging to manage than other large-enterprise solutions. References and Gartner clients cite the latest Cognos reporting engine, which is offered with no charge, as getting better and recently being enhanced. Customers are also hopeful for the new TSM Operations Center, which has been publicly previewed and is based on the successful usability features in the IBM XIV and Storwize storage arrays, and which initially will focus on monitoring and is targeted for a 2Q13 delivery.

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 the highest marks of any enterprise recovery product. However, IBM often receives low to no credit for its recent technical accomplishments (such as the no-charge target-side and client-side deduplication and the new integrated, and also free-of-charge, Cognos reporting engine).

The move to DB2 as the back-end database resulted in even greater scale for a single TSM instance, as well as a smaller footprint for the TSM catalog. While TSM has been historically late with VM support, the 2012 TSM for Virtual Environments update has closed the gap and now provides solid VM capabilities. Capacity-based licensing options and the TSM Suite for Unified Recovery bundle have been much more favorably received than the cryptic Processor Value Unit (PVU) method; customers site these pricing models as allowing them to deploy greater backup capabilities.

With the company having addressed VM backup, there shouldn't be any major product gaps holding TSM back, especially given the recently delivered integrated snapshot support for all IBM (DS8000, XIV and Storwize family) storage products and the original-equipment-manufactured DS3000, DS4000, DS5000 and N series, as well as the NetApp storage arrays, and offering node replication for greater TSM availability and scale. The acquisition of Butterfly Software for total-

cost-of-ownership comparison and importing backup data from all major competitors could make take-outs easier. If IBM can raise feature awareness and deliver on a solid administrative update, the TSM portfolio should be poised to gain more traction, given the product's ability to scale and broad market reach via direct and partner sales.

Strengths

A major market share player, IBM TSM offers midsize to large-enterprise end-to-end recovery capabilities, from single machine to the largest enterprise to cloud and other managed services, in addition to dedicated recovery appliances and storage infrastructure.

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 strong support staff as major reasons for choosing, and remaining with, the solution.

Cautions

The perceived poor usability of the TSM administrative console and lacking reporting features continue to be major obstacles, despite several attempted enhancements.

Low understanding and exploitation of many recent features, combined with a large portion of the installed base running old versions of the products, has led to product switching issues.

There is no initial agent deployment.

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NetApp

Foundational to NetApp's data protection strategy is the ability to take numerous, space-efficient snapshots without incurring a performance penalty and thus adversely affecting users or applications. NetApp also heavily leverages compression and deduplication on its systems as part of its snapshot and replication strategy for backup/recovery. NetApp was early to market with all these capabilities and influenced how other storage software and hardware vendors approached backup and recovery. NetApp snapshots do not incur performance degradation, even as the amount of data increases, making frequent snapshots a practical option for protecting NetApp storage, or as a target device for protecting non-NetApp storage. For the purposes of this evaluation, Gartner considered NetApp's SnapManager portfolio, SnapVault, Open Systems SnapVault (OSSV), OnCommand Protection Manager, SnapProtect and, in part, joint developments between NetApp and several third-party backup vendors.

NetApp has a diverse portfolio of backup solutions, a combination of owned and partnered products, and differing value propositions for protecting NetApp and third-party storage, with strengths and challenges varying widely, depending on the solution. In NetApp Data Ontap-based storage, the company leverages its snapshot, replication and cloning capability and adds rich application support via the SnapManager family of application-specific management interfaces that are primarily aimed at the application administrator. NetApp provides a roll-up of SnapManagers into NetApp's OnCommand Protection Manager, which can discover, automate, monitor and manage snapshot and replication activity on a broad level. The SnapManager family has been very successful, with more than 270,000 licenses of one or more of its solutions sold.

NetApp has a joint development activity that expands on CommVault's Simpana platform that is called SnapProtect, which is now NetApp's premier recovery solution. SnapProtect offers a single management console for defining and managing snapshot and replication from creation through remote copies and off to tape, with broad application integration and reporting.

For third-party storage protection, NetApp has a "meet in the channel" model with partner Syncsort for the NetApp Syncsort Integrated Backup (NSB), which exploits Syncsort's OS and application support, along with BLI processing, and then writes data to a NetApp Data Ontap-based storage array and exploits NetApp compression and deduplication in addition to snapshot and replication capabilities. NetApp also has its OSSV, which claims a base of nearly 90,000 licenses, that supports Linux and Solaris files and Windows files and SQL Server for BLI processing via software agents to a NetApp Data Ontap-based storage device.

NetApp has deep relationship with backup vendors such as Asigra, CommVault, IBM, Symantec and Syncsort to allow greater exploitation of NetApp snapshot and replication management via these backup products.

Gartner increasingly hears from clients that snapshot and replication augmenting or replacing traditional backup are becoming of interest and are more frequently deployed. With deep capabilities of its own and a strong partner ecosystem, NetApp offers a vast number of recovery options and capabilities. These capabilities are very strong for protecting NetApp's own storage and can also be used, although much less often, for protecting third-party storage.

Strengths

Snapshot techniques do not require file system scans to detect new and changed data. Backups and restores can be done rapidly, with the backup window being nearly eliminated, minimizing the impact on production file and application servers.

Customers and references cite the portfolio's ease of use and ability to manage many terabytes' to petabytes' worth of recovery data with less staff as major reasons for investing in the solution.

NetApp Data Ontap snapshot, replication and snap management tools keep data in its native format, making fast failover for DR, instant cloning, testing, development or data mining very easy.

Cautions

Because NetApp has integrated its core snapshot and replication technologies with such a broad portfolio of branded and partner recovery solutions, it's important to understand the capabilities of the alternatives and to map requirements to the options in order to select the

most effective data protection solution(s).

Full realization of the data protection benefits of NetApp's recovery portfolio may require NetApp's SnapProtect or partner solutions, such as those from CommVault (Simpana), IBM (TSM), Symantec (NetBackup) or Syncsort (DPX) to extend the capabilities and supported environments.

NetApp's OSSV software for capturing data that does not reside on NetApp storage offers reasonable OS coverage (Linux, Solaris and Windows) but only SQL Server application support.

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Symantec

Symantec has two main backup product lines: NetBackup and Backup Exec. NetBackup and Backup Exec are market-share-leading solutions in the enterprise and midsize enterprise segments, respectively. NetBackup is the single largest revenue-producing product in Symantec's portfolio and in the overall backup software market. Symantec offers solid deduplication software, as well as a successful line of integrated backup and deduplication appliances (note that appliances are not the focus of this research). The Symantec OpenStorage (OST) interface allows integration with other backup hardware solutions to be managed under one console and to minimize data transfer. These product lines are largely different code bases targeted at two different audiences: NetBackup at the enterprise and Backup Exec at SMB and ROBO markets; however, in the last four years, there has been code sharing around deduplication, virtualization, OST APIs and Microsoft Windows, Exchange, SharePoint and SQL Server support.

Symantec launched major upgrades in 2012 to Backup Exec (version 2012) and NetBackup (version 7.5) on the same day around the world. Backup Exec 2012 has received very mixed reviews, with many customers complaining about the removed features and incompatibility with previously defined backup jobs. Customer support for both products has taken a significant hit as well in the recent past, and Gartner clients and reference checks for this research were very vocal about this issue. Symantec's new CEO addressed these concerns in his first quarterly earnings call, explaining that overall product quality will be improved through enhanced testing, that Backup Exec will get corrected, but that this will take time. He also recognized that support needs to be improved. The CEO and executive team reorganization from the 3Q12 appear to be making positive changes, but while references point to the April 2013 beta of the delayed NetBackup version 7.6 as being the most solid release to date, Backup Exec customers are approaching a year for delayed support of the latest Windows OS and applications.

Symantec is having success with its capacity-based licensing schemes to address historical concerns over pricing and maintenance, which have received positive feedback from Gartner clients and references. The late 2011 and strong 2012 marketing and awareness efforts by Symantec regarding its backup portfolio, which have continued in 2013, have been successful, with Symantec not only defending its installed base better, but also winning an increasing amount of new deals for NetBackup.

With NetBackup version 7.5 released in 2012, product functionality is catching up to the marketing, and the new features are resonating in the marketplace, while also providing customers and prospects with confidence regarding the future road map. NetBackup improvements to its OpsCenter have been highlighted by customers as being very positive. Features such as NetBackup Accelerator for very fast backups, optimized synthetic backup for creating instant full backups, very solid VM support with robust granular item restore support, and Automated Image Replication for backup catalog and images across NetBackup instances and deduplication have been well-received by the NetBackup installed base. To address recovery time concerns in virtual environments, Symantec will also introduce an Instant Recovery feature in version 7.6, allowing VMs to be powered on from within the backup system, cutting restore times down to minutes.

Gartner does continue to hear customer concerns about the amount of time required for deduplicated data to be rehydrated to physical tape and the continued delays in version 7.6 (originally targeted for 4Q12).

Strengths

Symantec is a market share leader that offers end-to-end recovery capabilities from single machine to the largest enterprise, to cloud services via software or preconfigured backup appliances, and/or the ability to better-manage third-party backup appliances.

V-Ray technology for enhanced server virtualization support for VMware and Hyper-V offers very robust VM support, with a number of industry-exclusive features and capabilities. V-Ray integration with Replication Director in version 7.6 further enhances this.

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

Cautions

Customers and references have been very critical over Backup Exec code quality and especially customer support for both Backup Exec and NetBackup.

NetBackup Replication Director, launched in 2012 in version 7.5 and extended in version 7.6, still has comparatively limited storage array support and is slowly rounding out virtual and application capabilities.

NetBackup's SharePoint agent continues to receive mixed feedback; however, version 7.6 may have addressed this.

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Syncsort

Syncsort's backup solution was initially called Backup Express (BEX) and more recently was

changed to DPX. Since September 2010, Syncsort has focused on integrating its BLI and application-aware technology with NetApp array-based snapshots, creating and favoring the integrated NSB solution over a pure software sale alone. From a go-to-market standpoint, Syncsort is 100% channel, focusing exclusively on a "meet in the channel" relationship with NetApp. At the same time, Syncsort has fully embraced the notion of snapshots for backup and recovery, something the company had supported several years prior. Syncsort recently demonstrated the ability to drive NetApp snapshots on primary storage to eliminate the backup window for those datasets. Syncsort is usually deployed in environments protecting a dozen to hundreds of servers, with some examples of 1,000 protected machines, and it is also deployed by MSPs.

Syncsort was very early (five to eight years ago) to market with compelling backup features, such as BLI backups, keeping a change journal on all file systems to track new and modified files to avoid long-running file system scans during backup, and offering a form of instant access to run production workloads from the backup data store when the primary storage is compromised. These are things that are only beginning to be commonly offered by other vendors. Despite all the past technical potential, to date Syncsort has not been able to fully capitalize on its lead in the marketplace. But now, nearing three years after the first introduction of the NSB solution, traction is improving in broader and larger deployments. Syncsort is looking to garner significantly greater mainstream awareness and traction through a variety of marketing and technology initiatives in 2013 and beyond.

While technical advances in the last several years seem to have tapered off, the company is early on in a major transition to offer new solutions and integration capabilities. Syncsort has recently released a large-scale global catalog, ECX, to support customers' transition to snapshots with rapid search and analytics. Initially, ECX will catalog NetApp and VMware snapshots and files. While ECX is offered as a stand-alone solution, it is also targeted to be integrated into DPX backup software in 2Q13. The ECX catalog offers new capabilities to support customers' shift to snapshot-based data protection, with the capability to coexist with any other backup solution. More ambitious is Syncsort's new cloud-based data management framework to act as a service-oriented orchestration engine for policy-based management of Syncsort backup and DR capabilities and catalog services from other cloud management tools.

Syncsort's ability to achieve traction with the NSB solution and DPX software, along with new primary snapshot management and forthcoming service-oriented backup management, will determine the company's ability to reach a broader customer base with what seems to be innovative, market-resonating features striving for greater awareness and adoption.

Strengths

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

Solid server virtualization and file system support are use cases where the solution offers compelling capabilities.

A BLI approach offers solid 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

Several Gartner clients and references highlight the product's ease of use but cite concerns over a dated administrative console and a need for improved reporting; however, Syncsort stated that it has plans to add a new Web-based portal interface and new reporting and analytics capabilities in 2013.

Today, primary storage snapshot recovery is limited by needing to mount the snap and manually finding the item; however, integration with the new ECX catalog search engine in 2013 will simplify the process.

Very little mind share and market traction for BEX/DPX raise long-term viability concerns.

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Veeam Software

Founded in 2006, Veeam is a fast-growing, private company with more than 1,000 employees. Its global headquarters are located in Switzerland, and its U.S. headquarters are in Columbus, Ohio. The company has gained commercial success with its Veeam Backup & Replication product, which was designed specifically for the VMware environment and launched in 2008. Veeam boasts 74% annual growth for its backup revenue in 2012 and more than 60,000 paid customers (with an additional 200,000 users of its free edition or tools) worldwide by the end of March 2013. The company reported that more than 80% of Veeam customers today are in relatively small virtual environments (with less than 100 VMs), with about 400 customers supporting 1,000 or more VMs. Veeam rearchitected its product at the end of 2011, making it more scalable and supporting multiple sites, with streamlined workload distribution. Veeam has achieved high brand awareness in the backup industry as a result of its early entry to market with a simple, affordable and often innovative VM backup solution and via successful marketing campaigns. In late 2011, Veeam expanded its support to Microsoft Hyper-V. Gartner is featuring Veeam in this year's Magic Quadrant because of its sizable presence in the enterprise and strong interest from Gartner clients.

Veeam Backup & Replication is an image-based, incremental-forever backup and replication tool, which supports periodic synthetic full backups. It was the first VM backup solution that combined backup and replication and embeds deduplication. Veeam was early to offer Linux support and provide easy single-file recovery for multiple file systems running on a VM without the need for a guest agent and indexing. Later, the company introduced multiple functions based on its innovative vPower technologies, including newly patented Instant VM Recovery (allowing recovery of a failed VM by creating a new VM and mounting a Veeam backup in a couple of minutes) and SureBackup (automated verification of a VM backup recoverability by booting and running the VM from a backup copy in a virtual lab). Other vPower-based functions include Universal Application-Item Recovery (U-AIR)and Virtual Lab for isolated test environments. For large VM environments,

the multitiered Veeam architecture can support many simultaneous backup jobs by load balancing multiple proxies (sources) and repositories (targets).

In the past year, Veeam has launched a free edition to further drive brand awareness, as well as new features, such as Veeam Explorer for Exchange (for easy search and restore of emails) and Veeam Explorer for SAN Snapshots (to restore VMs from snapshots on HP's StoreVirtual Storage based on LeftHand Networks technology). Tape support is promised to be offered in version 7.

Strengths

Veeam has gained strong brand awareness and adoption among enterprises based on its VM-friendly backup tools.

Customers comment favorably on general code reliability, value of the Standard Edition, the user-friendly interface, built-in replication and fast VM recovery.

Veeam's pricing model is based on hypervisors' CPUs, which could reduce cost for an environment with a high VM density.

Cautions

The vast majority of Veeam customers are in the small to midsize VM environments.

The current version of Veeam Backup & Replication does not offer physical server backup or tape backup.

Some customers cite the backup scheduler as not being as flexible or automated as enterprise products and technical support as being subpar for large enterprises.

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Vendors Added or 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 appearing 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. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

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Added

Actifio, Dell and Veeam are three new vendors to this Magic Quadrant. Actifio and Veeam were added, and Dell has been added via its acquisition of Quest Software, which previously was included in the Magic Quadrant. Dell backup/recovery assets also include the 2012 acquisition of AppAssure.

Note that the previous name "Autonomy, an HP company" has been changed to "HP"; however, this does not represent an addition.

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Dropped

No vendors have been dropped from this Magic Quadrant.

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Inclusion and Exclusion Criteria

In an attempt to ensure that the most market relevant solutions are covered in this Magic Quadrant, the following 13 criteria need to be met at the time that initial research and survey work commences in order to be included in the 2013 Magic Quadrant for Enterprise Backup/Recovery Software:

1. 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 possess heterogeneous backup software capabilities.
2. 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. Solution must support files and multiple applications on Windows and either Linux or one or more Unix OS (AIX, HP-UX, Solaris) in a physical and/or a virtual deployment supporting both VMware and Hyper-V.
4. Solution(s) must natively support writing data to disk targets and optionally support writing to a physical tape and/or a cloud destination.
5. Solution(s) must be available for purchase as an on-premises owned/licensed program product and not only as a service or as part of an appliance.
6. Vendor must achieve more than US$25 million in annual new license backup software and license backup software maintenance revenue.
7. Vendor should have a growing base of customers and be actively expanding in the large-enterprise backup/recovery software market.
8. Vendor must have disk-based backup/recovery software solution(s) 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 OS) systems in a physical and/or a server virtualized environment.
9. Vendor must actively market its branded backup/recovery products in at least two major regions (for example, North America and EMEA, or Japan and Asia/Pacific).
10. Vendor must be the originator of the required capabilities and meet all the above requirements via intellectual property that it owns and not rely exclusively on third-party solutions to meet these criteria.

11. New emerging vendors should have significant market awareness among midsize and large enterprises, indicated by the number of unique Gartner user client searches from Gartner's search analytics in the last 12 months.
12. Vendor must have briefed Gartner on its backup/recovery product(s) 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.
13. Vendor must appear on the enterprise backup/recovery product evaluation lists of Gartner's end-user organizations.

Vendors were excluded if:

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

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(s) and not deliver only a disk target alone. This was done to exclude those vendors that deliver a VTL and other disk-based backup appliances but do not possess a backup application. If a vendor meets all the criteria and also delivers a hardware-based solution, such as a VTL and/or a disk-based backup appliance, that is factored into the evaluation of the vendor's overall recovery portfolio.

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 based in part on EMC's Avamar backup technology.

Evaluation Criteria

Ability to Execute

Gartner analysts evaluate backup/recovery providers on their ability to effectively execute on their vision 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, backup/recovery providers are rated on their market understanding and success in realizing on their vision. The Ability to Execute axis highlights the vendor positioning directly attributable to that vendor's actions. While highly important, the product or service attribute is just one of the seven attributes Gartner evaluates to determine a vendor's placement on the Y-axis of the Magic Quadrant.

Product or Service: Core goods and services offered by the technology provider that compete in/serve the defined market. This includes current product/service capabilities, product quality, feature sets, skills and so forth, primarily offered natively as defined in the market definition. This 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 being based on the vendor's portfolio (versus tactical or point product usage). As this is an enterprise-focused evaluation, the completeness and scale of the solution are heavily weighted subcriteria; however, ease of deployment and administration are factored in as well.

Overall Viability (Business Unit, Financial, Strategy and Organization): Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and especially the likelihood of the individual business unit to continue to invest in backup/recovery products, continue offering these products, and advancing the state of the art of the backup/recovery solutions.

Sales Execution/Pricing: The technology provider's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing (both acquisition but especially maintenance) and negotiation, presales support, and the overall effectiveness and timeliness of the sales channel. Flexible pricing models are increasingly deemed important by the marketplace. Customer and revenue growth is an indication of success in this category.

Market Responsiveness and Track Record: Ability to respond to, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customers' needs evolve and market dynamics change. This criterion also heavily considers the provider's three-year history of responsiveness in meeting or being ahead of the market.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's clear and differentiated message in order to resonate and 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 and amount of "buzz" or noise level can be driven by a combination of publicity, promotional, thought leadership, word-of-mouth and sales activities. This directly leads to unaided awareness (Gartner end users mentioned the vendor without being prompting) 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. The amount of awareness and buzz from Gartner clients is factored in, as is the degree of unaided awareness (meaning, do others ask Gartner about the vendor/product, or does Gartner mention it after hearing the customer's requirements?) of the vendor and product(s).

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 or account support, as well as the perception of how accurate, effective and timely this support is. This can also include ancillary tools, customer support programs (and their quality), availability of user groups and SLAs. This category is heavily weighted by customer service and support feedback from end users in the past 12 months.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product or Service	High
Overall Viability (Business Unit, Financial, Strategy and Organization)	High
Sales Execution/Pricing	High
Market Responsiveness and Track Record	High
Marketing Execution	High
Customer Experience	High
Operations	No Rating

Source: Gartner (June 2013)

Completeness of Vision

Gartner analysts evaluate backup/recovery 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, backup/recovery providers are rated on their understanding of how market forces can be exploited to create opportunity for the provider.

This evaluation is based on the vendor's ability to convincingly articulate its future product direction and demonstrate innovation in meeting customer needs, enabling the vendor to more effectively compete in the market. The credibility of a vendor's vision is weighed against its past ability to execute against previously stated plans. Market understanding should be the guiding factor in new product development to ensure that the engineered product meets customer needs. Managing the complexity of storage environments requires innovative approaches that will distinguish leaders and delight customers. Ultimately, technology providers are rated on their understanding of how market forces can be exploited to create opportunities for the provider. As such, the Completeness of Vision axis focuses on potential, and it measures the vendor's historical ability to deliver solutions in advance of widespread market demand.

A vendor with average vision will anticipate and respond to change by accurately perceiving market trends and exploiting technologies. However, a vendor with superior vision can anticipate, direct and initiate market trends. While highly important, the product attribute is just one of the attributes that Gartner evaluates to determine a vendor's placement with respect to vision on the X-axis of the Magic Quadrant.

Market Understanding: The ability of the technology provider to understand buyers' needs and translate these needs into products and services. Vendors that show the highest degree of vision listen and understand buyers' wants and needs. The more visionary cannot only observe, but can enhance those wants with their added vision and potentially even shape or move the market in either a new direction or accelerate market activity and trends. Gartner evaluates the vendor's current and future market understanding.

Marketing Strategy: A clear, high-quality, highly differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs, public events and tradeshows, and positioning statements. In a world where many vendors and products sound similar, what the message is, what vehicles are used to effectively communicate it, and how well the buying public resonate with and remember that message are now vital.

Sales Strategy: The strategy for selling a product that uses the appropriate network of direct and indirect sales, marketing, service, and communications affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services, and the customer base. This also includes the ability for the sales team to effectively and clearly communicate the current capabilities, along with the vision and road map, while also differentiating the offering(s) from the competition and alternative approaches.

Offering (Product) Strategy: A technology provider's approach to product development and delivery that emphasizes differentiation, compelling functionality, ease of deployment, and ongoing administration, methodology, and feature set as they map to current and future requirements. In short, the offering needs to be capable of not only meeting current and future tasks, but must also 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. In short, it is the breadth and depth of the solution. What matters most is how functionally complete (for an enterprise backup market) and capable the solution is.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or preemptive purposes. This especially includes the recent past 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-year) road map. In short, it is how unique, impactful and especially trend-setting new capabilities are or have been, and how well these capabilities resonate with the market.

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

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 as thought leaders, have well-articulated plans for enhancing recovery capabilities, improving ease of use, 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 continued industry consolidation.

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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. A Challenger may have a robust backup portfolio but has not yet been able to expand its market share, or has been slower to articulate how it will address future requirements in a server virtualized data center, the remote office and deduplication, or to exploit snapshot and replication. These vendors may not devote sufficient development resources to deliver products with broad market appeal and leadership features.

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Visionaries

Visionaries are forward-thinking, advancing their portfolio capabilities ahead of the market, but their execution has not propelled them into a Challengers or possibly Leaders position. 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.

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Niche Players

Niche Players are specifically focused on a subsegment of the market or product mix, or they offer broad capabilities without the relative success of competitors in other quadrants. In several cases, Niche Players are very strong in the midsize-enterprise segment, and they also sell to the large enterprise, but with offerings and overall services that, at present, are not as complete as other vendors focused on the enterprise market. Niche Players may focus on a specific vertical market or a 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 vendors are too new to the market or have fallen behind and, although worth watching, have not yet developed complete functionality or the Ability to Execute.

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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 at about 20% each year for the past five 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, companies are willing to adopt new technologies and products from new vendors, and they have shown an increased willingness to switch backup/recovery providers to better meet their increasing service levels.

The trends of incorporating more disk into the recovery process, deploying data deduplication and treating disk as disk, versus seeking appliances with a VTL interface, accelerated in 2012. For a deeper treatment on each of these topics, see:

"The Future of Backup May Not Be Backup"

"Organizations Leverage Hybrid Backup and Recovery to Take Advantage of Speed and Low Cost"

During the past year, we saw a trend toward increasing consideration of a cloud-based recovery implementation. In selected cases, large-enterprise server data was being moved to a cloud-based backup/recovery solution, but the predominant amount of interest was for midsize-enterprise servers and branch-office and desktop/laptop data. In the large enterprise, the most common cloud backup implementations have been for remote-office and desktop/laptop data. Gartner's worldwide survey data suggests that organizations of all sizes will increasingly evaluate cloud-based recovery solutions; however, most enterprises favor continuing with on-premises disk backup capabilities that are optionally also electronically vaulted to a cloud repository (disk-to-disk-to-cloud). Gartner expects that remote-office, desktop/laptop and SMB backup workloads to move to the cloud first, but that a local disk copy on-premises, combined with an electronically vaulted copy of the backup data as it ages and/or for DR purposes, will increasingly be considered (see "Is Cloud Backup Right for Your Servers?").

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Market Overview

Many organizations continue to rearchitect their backup infrastructures and support procedures in an effort to modernize their approach to handle new data types and large workload volumes, as well as to improve backup and restore times. Disk-based solutions, including backup directly to disk, server virtualization backup features and deduplication technology, are among the key items being sought. Mission-critical workloads are increasingly being deployed in server-virtualized environments, making VMware backup, along with Microsoft Hyper-V and Citrix Systems XenServer backup, more of a mainstream requirement. The cloud delivery model for backup/recovery is increasingly being considered for enterprise recovery requirements — especially for desktop/laptops and remote offices, and for some organizations that are seeking tapeless implementations. 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.

Beginning in 2011, there have been expanded choices for data protection that include replication and snapshots from hardware and software solutions, as well as new disk-based backup, deduplication appliances and disk imaging software. Some customers have chosen to invest modestly in their backup software in favor of augmenting (or even selectively replacing) backup applications with one or more of these technologies.

Gartner has identified five key trends that will emerge over the next several years:

Re-expanding the number of backup solutions and technologies out of a feeling of necessity, but going against a desire for a single solution.

Backup application switching

Decreasing backup data retention

Backup modernization

Deployment of new technologies and vendors

Notable recent backup/recovery acquisitions are as follows:

January 2013 — Western Digital acquired Arkeia Software.

December 2012 — 21st Century Software acquired Ice-Pak.

October 2012 — Carbonite acquired Zmanda.

September 2012 — Hitachi Data Systems acquired Cofio Software.

September 2012 — IBM acquired Butterfly Software.

September 2012 — Good Technology acquired Copiun.

July 2012 — Dell acquired Quest Software.

The enterprise distributed system backup/recovery software market was valued at $4.4 billion in 2012, and it is projected to grow to $6.8 billion by 2017, for a five-year compound annual growth rate of 9.0%. Symantec currently owns 31.6% of the market, a dominance that has slowly eroded over the previous five years; in 2012, Symantec posted modest (less than 1%) growth. EMC and IBM make up the next tier of vendors on a revenue basis, with 17.3% and 17.2% market share, respectively. Note that Mozy is now counted in EMC's revenue, which very slightly edges EMC toward the No. 2 position, whereas without Mozy, IBM would be No. 2. However, the two vendors are essentially tied for the second position behind Symantec. Every other vendor has less than 8% market share. In 2012, CommVault and HP increased their market share the most; however, all other named vendors in the report, except CA Technologies, grew market share in 2012. Note that, due to multiple acquisitions, year-over-year market share for Dell cannot be derived. Collectively, the top three vendors (Symantec, EMC and IBM) command just over two-thirds of the market, with 66.1% of share.

For additional market and vendor research in the backup/recovery segment, see:

"Forecast: Storage Software Markets, Worldwide, 2009-2016, 4Q12 Update"

"Market Share: Storage Management, Worldwide, 2012"

"Market Share Analysis: Storage Management Software, Worldwide, 2012"

"Vendor Rating: CA Technologies"

"Vendor Rating: EMC"

"Vendor Rating: HP"

"Vendor Rating: NetApp"

"Vendor Rating: Symantec"

"Vendor Focus for Symantec: Storage and Server Management Offerings"

This 2013 Magic Quadrant for Enterprise Backup/Recovery Software is an update to the previous instance that was published in June 2012.

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