Driving Smart Data Management in the 3rd Platform Era – An Integrated Approach to Managing, Accessing and Protecting Critical Data

Sponsored by: CommVault

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IDC OPINION

Organizations are facing a massive and disruptive shift to what IDC calls the "3rd Platform". This is built on the four technology pillars of Big Data, cloud, mobile and social, something that presents significant opportunities to transform how businesses are run, driving future growth and innovation. The goal of this new platform is to accelerate new capabilities, lower costs, and reduce the need for major capital investments in IT infrastructure. However, this requires organizations to rethink how datacenters should be built and designed, the types of systems and applications that are needed, and how they should be operated. Changes of this magnitude are not common.

Recent years have seen a tremendous growth in the amount of data that is being generated from transactions and interactions. Servers, networks, machines, sensors, cameras, and countless other devices are continuously capturing and generating data – something that is driving increased spending on storage. In fact, IDC forecasts that Asia/Pacific excluding Japan (APEJ) spending on storage for Big Data will continue to grow at a compound annual growth rate (CAGR) of 42% between 2012 and 2017. Much of this growth is driven by risk mitigation initiatives to comply with regulations, and the need to service unforeseeable requirements and future analysis. However, the cost of collecting and analyzing all of the data, in its entirety, is becoming economically unfeasible for many organizations.

At the same time, data today resides in multiple locations – not only on-premises but also in various silos and third-party datacenters, in highly virtualized environments. All this adds yet more complexity, especially when determining the most efficient and reliable way to ingest, protect, organize, access, preserve, and also delete all this data when needed. In light of this organizations need to:

- **Develop an effective data management strategy.** Organizations should evaluate current and future business plans and define a framework including milestones, deadlines, and policies around data management and data quality models. Understanding data size, predicted growth, variety, and location is critical.

- **Optimize the storage layer.** Data proliferation requires organizations to revisit their storage architectures. Organizations looking at reducing their storage footprint should increase focus on the use of archiving, data deduplication, thin provisioning and storage tiering.
• **Ensure data protection.** Organizations should consider using a flexible and scalable data management solution that automates data protection, recovery, and archive processes while enabling policy-based management across internal and external IT assets.

### METHODOLOGY

This IDC White Paper is based on primary and secondary research across the buy and sell side for the business analytics market in the APEJ region. IDC conducts regular CIO and executive decision making focused surveys across APEJ, and also obtains insights from analysts’ interactions with CIOs of Asian organizations. A combination of the following surveys and studies were used to draw some of the insights in this White Paper.

• **IDC AP Smart Data Management Survey (IDC SDM Survey)** sponsored by CommVault. In September/October 2013, IDC conducted this survey across vertical industries in Asia/Pacific in order to understand the top data management drivers and challenges in the context of major trends like Big Data and cloud. The results are based on insights gathered from over 500 IT decision makers across Australia, New Zealand, China, Korea, Singapore, Malaysia and Thailand.

• **IDC APEJ C-Suite Barometer.** The C-Suite Barometer provides intelligence and insights into how 1,000 organizations in APEJ rated their business and IT priorities, pressures and preferences in relation to achieving business goals.

• **IDC AP Business Analytics Pulse Survey.** This survey provides intelligence and insights into how over 776 CIOs and IT decision makers across APEJ rate and rank their Business Analytics priorities for both the short and the long term. This survey includes country, vertical industry and organization size specific insights.

### IN THIS WHITE PAPER

This IDC White Paper explores the customer challenges associated with data management in the context of the 3rd Platform, particularly around Big Data and cloud. The paper also highlights the top priorities, business and IT challenges, and trends impacting data management for AP organizations. In addition, the paper takes a look at how the adoption of CommVault Simpana can help organizations in AP address these data management challenges, and provides guidance for end-user organizations.
SITUATION OVERVIEW

The State of the Market in Asia/Pacific

While the shift toward a less predictable market means that uncertainty has become the norm, the Asia/Pacific region remains as a reliable engine for growth, and multinational corporations and Asian companies alike will continue to relentlessly look to Asia for future opportunities. This in turn is raising the pressure on business executives in the region to drive the expected results for the year ahead, while concurrently being challenged by the increasing levels of risk, limited budgets and unpredictable customers. As a result, this has turned the region into a hyper-competitive place, and organizations that fail to adapt to the required business flexibility while achieving the necessary speed to market will find it hard to compete.

The top business priorities for 2014, based on IDC's APEJ C-Suite Barometer Study, are finding new customers or customer segments, handling escalating cost of operations (especially labor costs) and finding new innovations to compete in the market. As a result, a renewed focus on customer centricity will be top of the business agenda, together with a focus on technologies that can drive innovation and help companies improve customer engagement, and the knowledge of which customers contribute the most to the business. This will be centered on gaining a holistic customer view to obtain real insight into the value and life cycle of each customer. In order to do this, organizations will not only look at transactional data, but will increasingly capture and analyze wider sources of data within and outside their organizations.

However, in order to drive these initiatives organizations will need to increase the collaboration between the business and IT. One of the key inhibitors for this is the fact that IT is overburdened with the growing complexity of business requirements, as well as with regular end-user and technical support issues – something that is hampering their ability to be an innovation engine (as required by the business).

Also, regional organizations’ lack of IT technology skills – especially the advanced skills needed to support 3rd Platform projects – is another facet of the problems facing CIOs and project managers. For example, Big Data and analytics projects require the right skill sets, with data integration as a foundation and then forecasting, modeling, and simulation, in order to explore patterns that can guide future action. From a cloud perspective, while on-premises infrastructure is certain to remain in all APEJ markets, the technology skills of the average IT professional need a revamp to include, by default, the ability to plan and manage complex virtualized server and storage environments.

Finally, based on the same IDC's APEJ C-Suite Barometer Study, IT organizations are claiming that their limited budget is not adequate in supporting business growth/needs. Therefore, IT will increase focus on return on investment (ROI) led initiatives, as well as look at any opportunity that can help drive cost savings. For example, a growing number of organizations feel that the cost of collecting and analyzing the increasingly large data volumes is becoming economically unfeasible. In fact, based on the IDC SDM survey, 87% of companies in Asia/Pacific stated that they are willing to reduce their storage costs.
This willingness, which is a result of the aforementioned focus on cost saving, is consistent across countries in the region (see Figure 1). Nevertheless, IDC expects risk mitigation initiatives to comply with regulations and the need to service unforeseeable requirements and future analysis will continue to drive increase in storage spending. In fact, IDC forecasts that APEJ spending on storage for Big Data will grow at a CAGR of 42% between 2012 and 2017.

**FIGURE 1**

**Willingness to Reduce Storage Costs across AP**

AP - 75% of Organizations say “yes”

<table>
<thead>
<tr>
<th>Country</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>KR</td>
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</tr>
<tr>
<td>PRC</td>
<td>YES 79% / NO 7% / DNK 14%</td>
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<tr>
<td>TH</td>
<td>YES 89% / NO 9% / DNK 2%</td>
</tr>
<tr>
<td>MY</td>
<td>YES 83% / NO 17% / DNK 4%</td>
</tr>
<tr>
<td>SGP</td>
<td>YES 74% / NO 22% / DNK 4%</td>
</tr>
<tr>
<td>AUS</td>
<td>YES 72% / NO 27% / DNK 1%</td>
</tr>
<tr>
<td>NZ</td>
<td>YES 76% / NO 24% / DKN 0%</td>
</tr>
</tbody>
</table>

Source: IDC Smart Data Management Survey, 2013

Note: All data provided in the following sections of this document is derived from the IDC SDM Survey, unless stated otherwise.
Trends Impacting Data Management

There are major trends impacting data management today, including Big Data, cloud, mobility and virtualization. While these trends are impacting Asia/Pacific organizations to different degrees, this piece will focus on Big Data and cloud only.

**Big Data**

The intelligent economy produces a constant stream of data that is being monitored and analyzed. Social interactions, mobile devices, facilities, equipment, research and development (R&D), simulations, and physical infrastructure all contribute to the flow. In aggregate, this is what is called Big Data. IDC's definition of Big Data technologies describes a new generation of technologies and architectures designed to economically extract value from very large volumes of a wide variety of data by enabling high-velocity capture, discovery, and/or analysis.

Irrespective of size and industry, organizations in Asia/Pacific are seeing their data growing faster today than it used to a few years ago. 39% of organizations in AP claim that their data is growing by 20-50% year-over-year (YoY), while 13% say that this growth is over 50%. Of all industries, financial services, retail and wholesale, and media and telecommunications have the fastest data growth. The split by subregion is as follows:

- **ANZ (Australia and New Zealand)** – 48% of organizations in ANZ stated that their data is growing by 20-50% YoY. 17% said that this growth is over 50%.
- **ASEAN (Association of Southeast Asian Nations)** – 39% of organizations in ASEAN claimed that their data is growing by 20-50% YoY. 17% said that this growth is over 50%.
- **NA (North Asia)** – 32% of organizations stated that their data is growing by 20-50% YoY. 7% said that this growth is over 50%.

Admittedly, the challenge of handling ever-larger data volumes is not new for most storage administrators. However, Big Data can drive some companies to the limits of their current architectures faster. The existing data volumes and their future growth are relative to a company's ability to manage its data assets. The lack of skill sets, optimal tools, and gaps in its processes can further increase this challenge. Furthermore, size is not the only data dimension that matters.

Even the smallest organizations are now facing the challenge of managing new data types that are being produced and captured. Firstly, because most of this data is captured outside the organization, and secondly, because most of the growth comes from semi-structured and unstructured data types such as machine to machine (M2M), GPS location data, video or social media feeds. This is adding more complexity from an information governance perspective. At the same time, a significant proportion of these data types being captured are not yet analyzed (see Figure 2).
FIGURE 2

Data Captured vs. Data Analyzed in AP

Q. What type of data are being captured and analyzed in your organization?

As depicted in Figure 2, 79% of organizations in AP capture user generated text today, but only 62% of those analyze that data. But more significantly is video, which is captured by 46% of organizations and only analyzed by 29%, or audio (35% captured vs. 21% analyzed). Looking at this from a subregion perspective, the difference between data captured and analyzed becomes more apparent:

- ANZ – ANZ is the most mature region for data management. Nevertheless, transactional data is the most widely analyzed of all data types. However, while 86% of organizations capture user generated text, only 73% of those analyze that data. Furthermore, the largest gaps in data collected versus data being analyzed are in audio (43% vs. 25%), and video (53% vs. 35%).

- ASEAN – Singapore is slightly less mature than ANZ in data management and analytics, but significantly more mature than the other ASEAN countries. When grouped together, the largest gaps in terms of data captured versus data being analyzed are in user generated text (69% vs. 52%), and video (45% vs. 29%).

- NA – Similar to the other regions, transactional data is the most widely analyzed, but the gap between what is captured and analyzed is significantly larger – a reflection of the level of maturity of most organizations in NA and particularly China. Data is growing fast in NA, but many organizations still do not have the necessary technologies to capture and analyze the data that is created, nor the required skill sets. Undeniably, Korea's level of maturity is higher.
than China’s, but is still behind countries like Australia, New Zealand or Singapore. Overall, in NA the largest gaps in terms of data captured versus data being analyzed are in log files (68% vs. 42%), and GPS data (45% vs. 25%).

These gaps present a missed opportunity from an analytics perspective given the potential gains that can be obtained by becoming a data-driven organization. This also raises questions around what data should be kept and what should be discarded; and what is the best solution for managing data that is not used today but needs to be stored for compliance requirements and future analysis.

Cloud

Another trend that has dramatically impacted data management is cloud. Cloud is not only changing how IT is architected, procured and deployed, but also from whom, and how IT infrastructure is provided. Many organizations across the region are going through an evolutionary transformation to a cloud-based delivery and consumption model. Both technology and business factors are influencing this transformation. The advent and proliferation of virtual infrastructure, which separates logical from physical structures, is the cornerstone of this transformation. At a fundamental level the cloud delivery and consumption model creates significant opportunities, but also drives new challenges:

- **“Shadow IT”**. Cloud services may often compromise on configurability, but their acquisition model makes the solution attractive to line-of-business (LOB) users who can acquire these services with the swipe of a corporate credit card. This is a challenge for most organizations of any size. Departments are not having their needs met, or not quickly enough, so they source their own systems. While meeting their needs in the short term, it prevents that system from ultimately being of value to the organization as a whole. It also presents significant risks for information governance and security.

- **Data silos, access and protection**. With the LOBs becoming more IT savvy and embarking on IT projects independently, there is a risk of spreading data silos to the cloud. Also, IT organizations are increasingly adopting cloud applications, platforms and infrastructures, something that results in data being scattered across the organization both internally and externally.

The growth in consumer cloud services and the ubiquity of mobile devices places IT and the business at a challenging crossroad. Most of the data their employees generate today originates from mobile devices and is stored on consumer cloud services, such as DropBox, Evernote and iCloud, much to the chagrin of the IT department as this phenomenon poses a serious problem in terms of the governance of data. An organization's data resides in multiple locations, with a mix of legacy physical systems, virtual assets, and the use of cloud-based services. As a result, a major concern today for IT is finding solutions that can guarantee data protection and information security standards regardless of data location. While in AP most of the data is stored on-premises (36% stored in on-premises databases, 35% in on-premises datacenter, and 22% on-premises across multiple sites), more and more companies are looking at cloud and other third-party datacenter alternatives to bring the cost down. This is still relatively small today (only 7% for AP, 9% in ANZ, 11% in ASEAN, and 2% in NA) but significant growth is expected.
Also, the need to access data anywhere at any time is driving the use of cloud file sharing sites (see Figure 3). In fact, in AP, 45% of organizations said that employees at their company often or sometimes use cloud storage solutions (ANZ 45%, ASEAN 41%, and NA 46%). On the other hand, 53% said that employees rarely or never use these services (ANZ 53%, ASEAN 57%, and NA 50%).

**FIGURE 3**

Use of Cloud Storage and File Sharing Sites in AP

Q. How often would you estimate end users at your organization are uploading information to and using consumer cloud storage and file sharing sites (e.g. Dropbox, Mozy, YouSendIt)?

![Graph showing use of cloud storage and file sharing sites in AP](image)

N=505

Source: IDC Smart Data Management Survey, 2013

Surprisingly, only 20% of organizations claimed that their employees are using these services regularly in AP (ANZ 21%, ASEAN 24%, and NA 16%). Industries like energy and utilities, manufacturing and retail and wholesale claimed to have the lowest proportion of employees using and uploading data to these cloud storage platforms, whereas telecoms had the highest proportion. This, of course, raises questions on whether this means that certain industries have more visibility into what their employees do with data assets, and also if this visibility (or the lack of it) is the result of higher/lower permissiveness with such practices.

Also, when further asked about the level of confidence that the same organizations had in the security of data stored and shared via consumer cloud storage and file sharing sites organizations were balanced, with 32% claiming that they were not at all confident or not very confident, and 31% stating that they were extremely confident or very confident (37% said they were somewhat confident). If we look deeper into the AP subregions, the lowest degree of confidence in these sites is found in ASEAN.
Understandably, IT organizations consider this (and other "Shadow IT" practices) a loss of control. However trying to lock down and restrict these practices without providing real alternatives could result in unmet needs and more subtle side projects.

What is clear is that given the pervasive use of these file sharing and storage sites across countries (and its expected growth), organizations should ensure that the right data management policies are used in their organizations to ensure data protection, especially in the context of increased compliance requirements.

**Challenges and Solutions — Driving Smart Data Management**

**Rethinking Data Management — Single Platform Efficiencies**

Data management continues to be a top challenge for organizations, especially in the context of Big Data and cloud. Big Data exacerbates the challenge of shrinking backup windows and longer backup cycles due to the larger volumes. However, it also raises questions around the value of data and whether all data should be treated equal (i.e., identifying what data should be kept/discarded and where). At the same time, as AP organizations move to the cloud, thereby increasing their use of virtualization and cloud-based storage, they should ensure the following:

- **End-to-end protection.** Data needs to be protected and backup/recovery services need to support both virtual and physical assets.
- **Access.** Access to critical data assets needs to be ensured regardless of location, size and data type. Access to data needs to cater for the increasing number of users and mobility requirements. This also requires a reassessment of access control policies and security.
- **Performance.** Application performance and backup times could be impacted.
- **Control of data assets.** Data residency is a major concern for many organizations. Ensuring protection of both data in motion and at rest is critical.

There are several challenges to data management, but according to the IDC SDM Survey, performing a global search for company data across multiple data silos is the top challenge in the overall AP market (also in ASEAN and NA if split by subregions). This is followed by securely accessing company data from outside the office (this is the top challenge in ANZ), which is something that is aligned with the need to mobilize the workforce (see Figure 4).
The explosive growth in the use of mobile devices, such as smartphones and tablets, opens up new opportunities for anywhere access to information, but also impedes IT’s ability to protect and control sensitive corporate data. This should be considered a top priority for organizations, given that data loss can result in reduced productivity and revenue generation. Moreover, this also impacts the ability to discover relevant data for legal requirements, as well as making more accurate decisions, not to mention the impact that this would also have in terms of corporate brand reputation.

In line with this, AP organizations believe that if their corporate data was lost this would have a significant impact on the aforementioned areas. In particular, finance (70%), operations (70%) and customer service (56%) would be the most impacted areas of the business. This is also quite consistent when looking at data split by subregion:

- **ANZ** – According to ANZ organizations finance (88%), operations (84%) and customer service (78%) would be the business areas most impacted.
- **ASEAN** – ASEAN organizations stated that the areas that would be most impacted are finance (73%), operations (69%) and sales (66%).
- **NA** – Organizations in NA claimed that the areas that would be most impacted are operations (61%), finance (54%) and marketing (46%).
If we look at this by industry, finance, public sector, retail and wholesale, and manufacturing claimed that the business area most impacted if data was lost or their ability to access it was impacted is finance. The only exceptions to this were in the telecom and energy and utilities industries, which considered operations as the most critical business area.

Organizations simply cannot overlook the risks and consequences that would likely result if sensitive data is lost, stolen, or compromised or cannot be accessed when required. Data is the most valuable organization asset, and its availability to business users has to be guaranteed. In fact, 81% of organizations in AP considered that having access to the right information at the right time in order to support ongoing decision making, analysis and planning requirements is critical for the business (ANZ 87%, ASEAN 84%, and NA 73%).

As a result, organizations need to ensure they have a data management solution with comprehensive functionalities, and that can address the aforementioned challenges, especially in the context of Big Data and cloud. Figure 5 depicts AP organizations’ priorities for backup and recovery solutions.

**FIGURE 5**

Aspects Deemed Important for Backup and Recovery Solutions

Q. What are in your opinion the most important aspects of a data backup & recovery solution?

<table>
<thead>
<tr>
<th>Aspect</th>
<th>0%</th>
<th>10%</th>
<th>20%</th>
<th>30%</th>
<th>40%</th>
<th>50%</th>
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</thead>
<tbody>
<tr>
<td>The ability to manage and protect any type of data</td>
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<td>Scalability</td>
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<td>Ease to use</td>
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<tr>
<td>Quick ROI</td>
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</table>

N=505

Source: IDC Smart Data Management Survey, 2013
An effective solution needs to provide effective backup, replication, snapshots, and archiving. Furthermore, it needs to be able to do that across physical and virtual assets, regardless of where that data resides. At the same time, the solution has to support all data files, applications, databases, and endpoints. Not surprisingly, according to the IDC SDM Survey, 41% of organizations stated that the most important aspects of a data backup and recovery solution were the ability to manage and protect any data, regardless of size and type. This is because this variety of data types (e.g., M2M/sensor, GPS location, social media data, etc.) raises concerns around how to effectively manage and protect data that is created outside the firewall or lives in the cloud, but it provides key insights for business decisions.

Second, our research indicates that more and more organizations are attracted to the potential benefits of using a single unified solution to deal with their major data management needs. Today, the majority of organizations use disparate point solutions to address their protection, recovery, and access requirements. This is often the result of non-holistic data management practices and strategies, as well as different service level agreement (SLA) requirements. However, organizations' need for centralized visibility into distributed information assets to mitigate risk, improve decision making, and eDiscovery is driving more awareness and adoption of single platform solutions. According to the IDC SDM Survey, 38% of organizations in AP stated that the most important aspect of a backup and recovery solution is to provide end-to-end protection, management, and access of all data from a single platform. While the subregional splits are quite consistent with the aggregated results, NA organizations showed some divergence in their preferences. The subregional split is as follows:

- **ANZ** – For 45% of organizations in ANZ, the most important aspects of a data backup and recovery solution is the ability to manage and protect any data, followed by the preference for an end-to-end solution that allows protecting, managing, and accessing all data from one single platform (37%).
- **ASEAN** – 44% of organizations in ASEAN – with Singapore having the highest percentage among the three countries (48%) analyzed – pointed at end-to-end solutions as their top requirement for backup and recovery solutions. Their second consideration was the ability to manage and protect any type of data (43%).
- **NA** – In NA, 37% of organizations chose the ability to manage and protect any type of data as their top requirement. Although, different to other regions, they favored the easiness of use as their second priority (35%) with China (42%) showing the strongest preference for this requirement among all AP countries.

Traditional requirements like scalability, ease of use, or the ability to manage and protect any data type were, as expected, among the top priorities for those organizations surveyed. However, the results showed an increasing number of organizations becoming attracted to the potential benefits of end-to-end solutions. Given that this was the second most important factor for a large percentage of respondents, we further asked them about the most appealing potential benefits expected from this type of solutions (see Figure 6).
FIGURE 6

Top Benefits of End-to-End Single Platform Solutions

Q. What are the most appealing potential benefits of a solution that can enable you to protect, manage and access all data across your enterprise by using a single solution?

As depicted in Figure 6, organizations in AP stated that the most appealing potential benefits of a solution that can enable them to protect, manage and access all data across their organizations using a single solution would be:

- Improved storage and network optimization and cost savings (74%) – A single platform solution could reduce complexity and administration costs since it enables protection, recovery, access, and discovery simultaneously (or with one solution).
- Increased protection from data loss and leakage (73%) – Consolidating all data in a single virtual repository improves visibility into all organization assets, and therefore reduces the potential of data loss and leakage.
- More efficient and reliable disaster recovery (72%) – Many organizations do not have adequate protection and recovery policies or tools in place to manage the ever-increasing volume and variety of data. A centralized backup store for all physical and virtual assets is imperative in helping an organization assess the scope of potential information exposure. This provides greater visibility into existing data assets and better management of recovery policies.
Looking at this from an industry perspective, public sector, manufacturing and telecommunications also considered that the most appealing potential benefit of a single platform solution would be improved storage and network optimization and cost savings. On the other hand, financial services organizations and resource and utilities stated that the top benefit would be achieving efficient and reliable disaster recovery. Finally, retail and wholesale organizations said that a single platform solution would be beneficial to increase protection from data loss and leakage. The split by subregion is as follows:

- **ANZ** – 91% of organizations in ANZ said that the most appealing potential benefits of a single platform solution would be the improved storage and network optimization and cost savings, followed by more efficient, rapid and cost-effective eDiscovery and compliance (85%).

- **ASEAN** – The most appealing benefits of a single platform solution for organizations in ASEAN would also be the improved storage and network optimization and cost savings (86%), followed by the ability to have more complete/reliable information available for decision making (81%).

- **NA** – 63% of organizations in NA said that the increased protection from data loss and leakage would be the most compelling benefit of all, followed by the potential efficiencies and reliability gained in disaster recovery (60%).

**COMMVAULT SIMPANA**

**Company Overview**

CommVault is an innovative provider of data management software and related services. The company, which was formed in 1988 as a development group within Bell Labs, was incorporated in 1996. CommVault is headquartered in Oceanport, New Jersey, and has over 1,900 employees worldwide. Using its direct and indirect sales force – value added resellers – the company targets large enterprises, small and medium sized businesses, and government institutions. CommVault's global strategic partnerships include Hitachi Data Systems, Dell, Hewlett-Packard, Microsoft, NetApp, Novell, and Oracle.

CommVault's operations in Asia/Pacific started in Australia in 2003, and in 2013 the company moved its regional headquarters (HQ) to Singapore. The establishment of Singapore as CommVault's new regional HQ is not trivial. The company had direct presence in the country, but wanted to expand its operations further in ASEAN, a market that presents a strong opportunity. The fact that Singapore is home to an increasing number of datacenters makes this decision a step in the right direction. In addition to having direct presence in Singapore and Australia, the company has offices in China and India. Today, CommVault has gained a strong footprint in the ANZ markets (more than 60% of its existing customer base), but it is also seeing good growth in ASEAN and NA. The company is aggressively increasing its headcount, and looking at providing improved customer support and placing more research and development efforts in the region. Also, in order to ensure future growth, the company is reviewing its distribution model and planning a shift from volume to value, by building a selective list of partners.
Moreover, CommVault has increased its focus on working with managed services providers (MSPs). In fact, some of the company's recent product development is specifically targeted at MSPs. Moving forward, we expect CommVault to continue to enhance its product functionalities, as well as fine tune its value proposition to better address this market.

CommVault's flagship product – Simpana – has attracted many organizations looking for an integrated solution that can effectively help them address their ongoing data management requirements. Some of these organizations include the Stock Exchange of Thailand, the Singapore Government, the National Institute of Education of Australia, the Australian Federal Department of Treasury, Fonterra, INPEX, Consolidated Minerals and OneSteel.

Simpana

Legacy solutions and new technology approaches often provide a point-solution approach to address the various requirements of data management. Deploying and integrating different architectures drives increased costs, and also requires additional resources for the ongoing management and support of those solutions. CommVault's Simpana is unique in that it delivers backup, recovery, archive, replication, reporting, and search capabilities built on a single, modular, common code platform.

CommVault's single platform solution provides significant benefits, some of which include:

- **Single console (Single pane of glass).** Organizations can view, manage and access all functions and all enterprise data from a single console.

- **Unified capabilities across deployment model.** Simpana unifies data protection, search, replication, reporting, and archiving across all enterprise tiers, including on-premise, cloud, and hybrid deployment options.

- **Integrated backup and archiving.** The newly introduced OnePass (Simpana version 10) provides an integrated process for backup, archive and reporting from a single data collection and common infrastructure. This indexes files and emails at the first backup, so that data is available for search and restore in just one repository. Also, with this feature users can design and customize the data they want to retain and how they want to retain it.

- **Enhanced deduplication.** Simpana 10 provides fourth generation of deduplication technology. This including both target and source deduplication, and offers parallel deduplication, increasing deduplication speed for large-scale data environments.

- **Single data repository.** Simpana ContentStore is an access layer that makes the location of files transparent to the user. As a result, users can access and manage all data regardless of whether it is stored on primary storage, secondary storage, backup storage, archive storage, tape, or in the cloud. This provides a scalable, hardware-agnostic, virtual repository that is combined with its indexing capabilities that supports data protection, archive, and storage infrastructure reporting operations.

- **Edge protection.** Simpana provides data protection to safeguard distributed laptop and desktop devices. It supports all the latest Windows, Mac, and Linux systems with the same solution. Simpana Edge provides corporate IT control, processes, search, and monitoring of remote or mobile IT assets.
What's evident is that one of the strongest benefits of Simpana's single platform approach to data management is that it ensures a complete view into data across applications, devices, operating systems and locations. This allows for data to be accessed by all users for recovery, reporting, eDiscovery, compliance and analytics.

**CHALLENGES/OPPORTUNITIES**

38% of organizations in AP stated that the most important aspect of a backup and recovery solution is to have end-to-end protection, management and access of all data from a single platform. This is the key strength of CommVault's Simpana, and an increased number of organizations across Asia is becoming more aware and attracted to the benefits that this approach can provide to their data management challenges. This uniqueness in CommVault's approach to solving new and traditional data management challenges creates significant opportunities in AP where many organizations are looking at innovative solutions that can help them accelerate capabilities, as well as lower their costs.

Managing data continues to be a top challenge in AP, and the critical need to improve access, management and protection of critical data assets will continue to drive recognition and adoption of CommVault's Simpana. However, CommVault will also find resistance, especially among organizations that are more cautious with non-traditional approaches, or that want to avoid feeling locked-in to a single vendor, end-to-end solution.

Displacing existing products already deployed in customer environments is not easy, especially if the vendor is well-entrenched in the organization. For those cases, CommVault will need to clearly articulate its value proposition highlighting the business benefits that can be achieved by implementing Simpana.

Finally, IDC believes that CommVault needs to work on building a strong customer references program in Asia. CommVault has several customers in the AP region, but the lack of publicly available information about the customer names, and the use cases for adoption of Simpana in the region could have a negative impact in its growth and expansion.

**CONCLUSION**

Organizations in Asia are facing a tremendous growth in the amount of data that is being generated from transactions and interactions. Servers, networks, machines, sensors, cameras, and countless other devices are continuously capturing and generating data – something that is driving increased spending on storage.

Adding to this, data today resides in multiple locations, not only on-premises but also in multiple silos and third-party datacenters, in highly virtualized environments. All this adds yet more complexity, especially when determining the most efficient and reliable way to ingest, protect, organize, access, preserve, and also delete all this data when needed.
CommVault's approach to data management ensures a holistic view into all data assets across applications, devices, operating systems and locations. This allows for data to be accessed by all users for recovery, reporting, eDiscovery, compliance and analytics – knowing that all data sources are accounted for in a discovery effort or decision making purposes.

Furthermore, this improved visibility into all data assets allows users to define policies on what data should be retained, how it should be retained, or delete it to increase efficiencies. From an IT perspective this helps in optimizing storage, since only relevant data is retained. However, this also allows business users to ensure that data that has business and compliance value is stored, and data not meeting the defined criteria can be deleted from a single source. In fact, according to the IDC SDM Survey, a very large proportion of organizations in AP believe that a solution that can enable them to protect, manage and access all data using a single platform can allow them to improve storage and network optimization and cost savings (74%). Also, this can help increase the protection from data loss and leakage (73%), since consolidating all data in a single virtual repository improves visibility into all organization assets, and therefore reduces the potential of data loss and leakage. Finally, an end-to-end solution provides more efficient and reliable disaster recovery (72%), which is also critical, since many organizations do not have adequate protection and recovery policies or tools to manage the increasing volume and variety of data.

IDC believes CommVault is well positioned to further grow its business in this region. The company has a strong and differentiated value proposition that will attract organizations facing numerous data management challenges, particularly in the context of Big Data and cloud. Organizations considering a solution that can provide access, management and protection of core data assets should consider CommVault's Simpana as part of their selection process.
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