**COMPETITIVE ANALYSIS**

**IDC MarketScape: European Data Protection Software 2012 Vendor Analysis**

Carla Arend

**IDC OPINION**

This IDC study presents a vendor assessment of the European data protection and recovery software market through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that explain success in this market. This IDC MarketScape covers 10 vendors participating in the European data protection and recovery software market. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and relative one another as well as highlights the factors expected to be the most influential for success in the market in both the short and long term.

Based on IDC's analysis of current product capabilities, go-to-market strategies, and general business analysis, this IDC MarketScape finds that the European data protection and recovery software market is evolving; several emerging providers are realizing strong growth and adoption, while others struggling to survive in a competitive market. Considering changing business needs, IDC believes the following to be critical success factors in this mature market:

- **Functionality delivered and offering road map.** Is the vendor keeping up with technology advances in the datacenter and the data protection market so that customers have early access to innovation?

- **Delivery model appropriateness and execution.** Is the vendor keeping up with advancements in delivery models (e.g., cloud services, appliances, virtual appliances) to offer choice and flexibility for customers?

- **Sales and distribution capabilities and strategies.** Does the vendor cover the European market adequately so that customers have access to the products from local partners?
IN THIS STUDY

This IDC study uses the vendor assessment model called IDC MarketScape. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and help anticipate its ascendancy.

This study assesses a number of vendors participating in the European data protection and recovery software market. This evaluation is based on a comprehensive framework and a set of parameters that assess vendors relative to one another and relative to factors expected to be most conducive to success in this market in both the short and long term.

This study has two key sections. The first part is a definition or a description of the characteristics IDC analysts believe make a successful data protection and recovery software provider in Europe. These characteristics are based on IDC's ongoing surveys and discussions with IT and storage managers and key analyst observations of industry best practices.

The second part of this study is a visual aggregation of multiple vendors in a bubble chart. This display concisely illustrates the observed vendors in the market. The strategies axis represents a three- to five-year span and future perspective, while the capabilities axis represents current product and go-to-market execution.

In this IDC MarketScape, the estimated market revenue of each vendor is indicated by the size of the circle representing the vendor.

Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of a review board of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capabilities.

SITUATION OVERVIEW

Most (if not all) organizations are deploying data protection and recovery software technology because it is critical to have a backup copy in case an organization needs to recover from a system corruption or disaster. While the basic principles and architectures of data protection and recovery have remained stable for decades, several trends have disrupted the market in recent years and continue to drive innovation in the data protection and recovery software market.
**Virtualization.** Server virtualization has had a severe impact on data protection and recovery, and it has brought about profound changes in this market. A whole new set of vendors that specialize in data protection for virtual environments have been emerging, and vendors originating in the physical server world had to catch up to provide similar capabilities. Ultimately, vendors will need to offer data protection and recovery for both physical and virtual servers through one product, unless the customer has reached 100% server virtualization.

**Cloud.** Backup to the cloud and recovery in the cloud are emerging services in Europe that are gaining adoption as local service providers emerge. Using cloud as a backup target or offering data protection and recovery software as a service (SaaS) are increasingly important to European customers.

**Appliances.** Many European end users appreciate the ease-of-use and performance of backup appliances and prefer this new delivery and deployment model. Several data protection and recovery software vendors have evolved from a pure-play software approach to also offer backup appliances.

**Snapshots.** European organizations have evolved to deploy a combination of traditional file-based backup and image-based backup/snapshots to get the best of both worlds (i.e., speed of data protection from the snapshot and detailed recovery options and index from file-based backup).

**Data deduplication.** Ever-growing data volumes that need to be backed up challenge many organizations in finishing their backup jobs on time. Reducing data duplicates speeds up the backup process tremendously and is a commonly used technology today.

The European data protection and recovery software market is a mature market, which is dominated by four incumbent vendors that control 68.7% of the market. However, several other vendors have entered the market and achieve good growth rates based on innovative product features and good customer service.

---

**IDC MarketScape Vendor Inclusion Criteria**

For the purposes of this IDC MarketScape, we evaluated 10 providers that offer data protection and recovery software in Europe that meet the following criteria:

- Company needs to make more than $20 million revenue annually in Western Europe
- Provider is one of the top 10 vendors of this market
- Product needs to be available in at least 10 Western European countries

The following are the 10 providers included in this IDC MarketScape that met the criteria:

- Acronis
- ASG Software Solutions (formerly Atempo)
- CA Technologies
- CommVault
These providers met the criteria and have slightly different approaches to data protection and recovery, and they also provide different delivery, deployment, and licensing models. Some sell a hardware and software package, some sell a software-only package, and others sell separate software modules to address specific needs. To select the best data protection and recovery software provider for their businesses, buyers need to know what problems they would like to solve, and where the business will be in the next five years.

**Market Strategies and Evaluation Criteria**

The participating vendors have been evaluated on a scale from 1 to 5, where 1 represents "industry average" and 5 represents "excellent."

Table 1 shows the measurements used to evaluate data protection and recovery software providers' future road maps and business strategies.

### Table 1

**Key Strategy Measures for Success: European Data Protection and Recovery Software**

<table>
<thead>
<tr>
<th>Strategies Criteria</th>
<th>Criteria for Success</th>
<th>Subcriteria Weighting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offering strategy</td>
<td>Customers invest for the longer term and expect product and feature development over time. Customers want vendors to maintain a competitive offering, especially in terms of functionality, and want visibility of product development, together with a history of successful implementation for prior planned development. Vendors will be evaluated based on the existence of plans for product development, feature enhancements expected, previous successful road map execution, and how feasibility and realism of the road map.</td>
<td>4</td>
</tr>
<tr>
<td>Functionality or offering road map</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delivery model</td>
<td>The on-premises delivery model is challenged by software-as-a-service and appliance delivery models. The next delivery model is going to be the virtual appliance, so to remain competitive, vendors need to have in place plans to adopt this delivery model. In addition, vendors need to explore other mechanisms for future service delivery if they are to remain competitive. Vendors will be evaluated on the existence of plans for future delivery models, together with an assessment of how well these plans match with customer requirements.</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strategies Criteria</td>
<td>Criteria for Success</td>
<td>Subcriteria Weighting</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Portfolio strategy</td>
<td>Data protection and recovery software fits into the broader realm of data management solutions and needs to integrate with a broad range of other storage management tools and utilities. In the short term, these tools are well established, but vendors need to plan for integration in the longer term into a wider data management environment. Vendors will be evaluated on the existence and suitability of their plans to make easier their integration with a wider range of tools.</td>
<td>1</td>
</tr>
<tr>
<td>Range of services strategy</td>
<td>Moving from one backup architecture to another is a major undertaking for customers that are looking to services partners to help them design their next-generation data protection and recovery architectures. Vendors will be evaluated on how they plan to extend their geographic coverage in Western Europe, together with plans for increasing and managing the range of additional support and additional tools that can complement data protection offerings.</td>
<td>2</td>
</tr>
<tr>
<td>Offering strategy total</td>
<td>ǥ(555,1005),(955,1070)</td>
<td>10</td>
</tr>
<tr>
<td>Go-to-market strategy</td>
<td>ǥ(555,1005),(955,1070)</td>
<td></td>
</tr>
<tr>
<td>Pricing model</td>
<td>The pricing model for data protection and recovery software is moving from term licensing to capacity-based licensing, which includes all features into a flat price per terabyte. Vendors will be evaluated on any firm plan to extend and enhance pricing models. Credit will be given for planned enhancements in pricing model flexibility and for any innovation shown beyond current pricing model trends.</td>
<td>3</td>
</tr>
<tr>
<td>Sales/distribution strategy</td>
<td>The market for data protection software is mainly indirect; only very large customers tend to buy direct from the vendor. Being channel friendly is a key success criterion for vendors that need to define a go-to-market model with no channel conflict. End users benefit from a healthy channel through better prices and better service. Vendors will be evaluated on their plans to develop channels to smaller and midsize customers. Credit will be given where previous innovation in channel development is apparent, giving confidence in execution of current plans.</td>
<td>4</td>
</tr>
<tr>
<td>Marketing strategy</td>
<td>In a well-established market, marketing and brand awareness are crucial differentiators for vendors. Future success generates revenue that can be invested in innovation and product development, so end-users need confidence that vendors are able to maintain market presence and are competitive. Vendors will be evaluated on the strength and consistency of their marketing plans for market development, demand generation, and increased brand awareness.</td>
<td>1</td>
</tr>
<tr>
<td>Strategies Criteria</td>
<td>Criteria for Success</td>
<td>Subcriteria Weighting</td>
</tr>
<tr>
<td>---------------------</td>
<td>----------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Customer service strategy</td>
<td>As most data protection software customers interact with vendors through distribution channels, good customer service is very important to them. Vendors will be evaluated on their plans to improve customer response times and customer satisfaction. Credit will be given for comprehensive and regular customer satisfaction surveys as well as other processes to ensure customers can give suitable feedback on product and service performance.</td>
<td>2</td>
</tr>
<tr>
<td>Go-to-market strategy total</td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>Business strategy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Growth strategy</td>
<td>In a mature market, growth comes primarily from market share gains or through acquisition. End users want confidence that their supplier is competitive in the longer term so vendors need firm growth plans that ensure the continued availability of a competitive market. Vendors will be evaluated on the existence and feasibility of their growth plans and strategies, with credit given to prior success in implementing growth strategies.</td>
<td>5</td>
</tr>
<tr>
<td>Innovation/ research and development (R&amp;D) pace and productivity</td>
<td>Keeping pace with product innovation is important as the market keeps on moving fast. Vendors will be evaluated based on investments in R&amp;D, together with the level of innovation seen in vendor products and whether the investments generate growth or increase profitability.</td>
<td>4</td>
</tr>
<tr>
<td>Financial/ funding model</td>
<td>In a mature market, vendors need strong finances to ensure appropriate investments in product development. End users invest in a vendor relationship for the long term and the cost of change can be high, so end users want confidence that their vendor of choice has the financial strength to remain competitive. Vendors will be evaluated based on their strategies for generating revenue and investment plans for product development.</td>
<td>1</td>
</tr>
<tr>
<td>Business strategy total</td>
<td></td>
<td>10</td>
</tr>
</tbody>
</table>

Source: IDC, 2013

Table 2 summarizes the measurements used to evaluate data protection and recovery software providers’ current offerings, businesses, and go-to-market capabilities.
# TABLE 2

**Key Capability Measures for Success: European Data Protection and Recovery Software**

<table>
<thead>
<tr>
<th>Capabilities Criteria</th>
<th>Criteria for Success</th>
<th>Subcriteria Weighting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offering capabilities</td>
<td>Customers will expect the following set of features in their data protection and recovery software products: backup, data deduplication, bare-metal restore, cataloging and indexing of backups, granular file restore capability, support for both physical and virtual servers of different flavors, backup reporting, fast restore, support for many different operating systems and applications, snapshot integration and management, among others. Vendors will be evaluated based on which of the listed features are included in their product as standard and how well these features meet requirements of their customers.</td>
<td>4</td>
</tr>
<tr>
<td>Functionality/ offering delivered</td>
<td>The on-premises delivery model is challenged by SaaS delivery models and appliance delivery models. The next delivery model is going to be the virtual appliance. Customers expect to choose their preferred delivery methods that promise the most ease-of-use and ease-of-management. Vendors will be evaluated on the range and flexibility of delivery models and how well these delivery models meet customer requirements.</td>
<td>3</td>
</tr>
<tr>
<td>Delivery model appropriateness and execution</td>
<td>Data protection and recovery software fits into the broader realm of data management solutions and needs to integrate with compliance copies of data in an archive, disaster recovery copies at a remote site, replication technologies, ediscovery tools, and unstructured data analytics. Vendors will be evaluated on how well their data protection offering fits into this broader range of data management solutions and the range of supporting solutions available.</td>
<td>1</td>
</tr>
<tr>
<td>Portfolio benefits delivered</td>
<td>Moving from one backup architecture to another is a major undertaking for customers that are looking to services partners to help them design their next-generation data protection and recovery architectures. Vendors will be evaluated on the extent of their geographic coverage in Western Europe, together with the range of additional support and additional tools that can complement data protection offerings.</td>
<td>2</td>
</tr>
<tr>
<td>Range of services capabilities</td>
<td>The pricing model for data protection and recovery software is moving from term licensing to capacity-based licensing, which includes all features into a flat price per terabyte. The shift from one model to the other is coming about very quickly, and vendors will be evaluated on their ability to offer both models, especially as they count an increasing number of service providers among their customers; these service providers will not accept an upfront payment model but would rather require risk and revenue sharing.</td>
<td>3</td>
</tr>
</tbody>
</table>

| Offering capabilities total | 10 |
| Go-to-market capabilities   |  |
| Pricing model options and alignment |  |

©2013 IDC
**TABLE 2**

**Key Capability Measures for Success: European Data Protection and Recovery Software**

<table>
<thead>
<tr>
<th>Capabilities Criteria</th>
<th>Criteria for Success</th>
<th>Subcriteria Weighting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales/ distribution</td>
<td>The market for data protection software is mainly indirect; only very large customers tend to buy direct from the vendor. Being channel friendly is a key success criterion for vendors that need to define a go-to-market model with no channel conflict. End users benefit from a healthy channel through better prices and better service. Vendors will be evaluated on the breadth and flexibility of their channels to smaller and midsize customers.</td>
<td>4</td>
</tr>
<tr>
<td>structure, capabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marketing</td>
<td>Marketing and brand awareness are important to reach European data protection customers. Vendors will be evaluated on the strength and consistency of their branding and how well this branding for data protection fits in with their overall storage management marketing. In addition, vendors will be evaluated on how their market segmentation and marketing messaging matches the end-user market.</td>
<td>1</td>
</tr>
<tr>
<td>Customer service</td>
<td>Customer service is very important to European data protection customers. Vendors will be evaluated on how their customer service handles interactions with their customers, what response times and capabilities are offered for customer service, and how well the service is perceived by the vendor's customers. Credit will be given for regular satisfaction surveys, where processes exist to act on issues that arise from the surveys.</td>
<td>2</td>
</tr>
<tr>
<td>Go-to-market capabilities total</td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>Business capabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Growth strategy execution</td>
<td>The data protection and recovery software market is a very mature market, and growth can almost only happen by taking market share from competitors. Having the right features, delivery models, and pricing models are important to appeal to customers. Vendors will be evaluated on how their growth compares with competitors and how product features, delivery models, and pricing is used to achieve above-average growth in this market.</td>
<td>5</td>
</tr>
<tr>
<td>Innovation/ R&amp;D pace and productivity</td>
<td>Keeping pace with product innovation is important as the market keeps on moving fast. Vendors will be evaluated based on investments in R&amp;D, together with the level of innovation seen in vendor products, and whether the investments generate growth or increase profitability.</td>
<td>4</td>
</tr>
</tbody>
</table>
### TABLE 2

**Key Capability Measures for Success: European Data Protection and Recovery Software**

<table>
<thead>
<tr>
<th>Capabilities Criteria</th>
<th>Criteria for Success</th>
<th>Weighting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial/funding management</td>
<td>Investments in data protection and recovery software are long-term investments, so customers do care if the company they buy from is going to stay around for the medium to long term. Vendors will be evaluated based on current profitability and revenue growth compared with market averages.</td>
<td>1</td>
</tr>
<tr>
<td>Business capabilities total</td>
<td></td>
<td>10</td>
</tr>
</tbody>
</table>

Source: IDC, 2013

In addition to the criteria for success having varying weights, IDC believes the aggregate criteria (offering, go to market, and business) should also be weighted. Table 3 illustrates the relative weights used in this analysis.

### TABLE 3

**Aggregate Criteria Weighting for the European Data Protection and Recovery Software Market**

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Weighting</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strategy criteria</strong></td>
<td></td>
</tr>
<tr>
<td>Offering strategy</td>
<td>5.00</td>
</tr>
<tr>
<td>Go-to-market strategy</td>
<td>4.00</td>
</tr>
<tr>
<td>Business strategy</td>
<td>1.00</td>
</tr>
<tr>
<td>Subtotal</td>
<td>10.00</td>
</tr>
<tr>
<td><strong>Capabilities criteria</strong></td>
<td></td>
</tr>
<tr>
<td>Offering capabilities</td>
<td>5.00</td>
</tr>
<tr>
<td>Go-to-market capabilities</td>
<td>4.00</td>
</tr>
<tr>
<td>Business capabilities</td>
<td>1.00</td>
</tr>
<tr>
<td>Subtotal</td>
<td>10.00</td>
</tr>
</tbody>
</table>

Source: IDC, 2013
Based on the weightings, several types of factors emerge as most influential in predicting success:

- **Functionality delivered and offering road map.** Is the vendor keeping up with technology advances in the datacenter and in the data protection market so that customers have early access to innovation?

- **Delivery model appropriateness and execution.** Is the vendor keeping up with advancements in delivery models (e.g., cloud services, appliances, virtual appliances) to offer choice and flexibility for customers?

- **Sales and distribution capabilities and strategy.** Does the vendor cover the European market adequately so that customers have access to the products from local partners?

## Future Outlook

**European Data Protection and Recovery Software Forecast**

IDC’s market analysis examines the strategic direction and growth expectations for the European data protection and recovery software market. In 2012, the estimated European data protection and recovery software revenue was $1.25 billion, measured in constant 2H12 dollar. By 2017, the European data protection and recovery software market will grow to a total of $1.45 billion, representing a CAGR of 3.2% (see Table 4).

### Table 4

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data protection and recovery software</td>
<td>1,248.14</td>
<td>1,280.26</td>
<td>1,317.80</td>
<td>1,361.42</td>
<td>1,409.96</td>
<td>1,457.92</td>
</tr>
</tbody>
</table>

Source: IDC, 2013

**IDC MarketScape: European Data Protection and Recovery Software Market Vendor Assessment**

The IDC vendor assessment for the European data protection and recovery software market represents IDC's opinion on which vendors are well positioned today through current capabilities and are best positioned to gain market share in the next few years. Positioning in the upper right of the grid indicates that vendors are well positioned to gain market share. For the purposes of discussion, IDC divided potential key strategy measures for success into two primary categories: capabilities and strategies.
Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well it is aligned to customer needs. The capabilities category focuses on the company's current capabilities and services. In this category, IDC analysts look at how well a vendor is building and/or delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategy axis indicates how well the vendor's future strategy aligns with customer requirements in three to five years. The strategy category focuses on high-level strategic decisions and underlying assumptions about offerings, customer segments, businesses, and go-to-market plans for the future, which in this case is defined as the next three to five years. In this category, analysts look at whether or not a supplier's strategies in various areas are aligned with customer requirements (and spending) over a defined future time period.

Figure 1 shows each vendor's position in the vendor assessment chart.
Vendor Profiles

Acronis

Acronis was founded in 2002 and has been a privately held company. Its consumer product is True Image, a disk imaging technology, which allows customers to restore Windows, Linux, as well as virtual servers and workstations to their full operating state. Acronis has offices in eight European countries (France, Germany, the U.K., Italy, Spain, Switzerland, Belgium, and Sweden). The rest of Europe is covered through a network of resellers. Originally catering to home users and small business users, Acronis expanded its reach into the midmarket and enterprise with the release of its flagship product Acronis Backup & Recovery 10 in July 2009. Acronis’ vision is to provide a complete data protection platform covering physical, virtual, and cloud-based data. In September 2012, Acronis announced the acquisition of GroupLogic, an enterprise-class file sharing and synchronization vendor. According to IDC’s European Software Tracker, IDC estimates Acronis’ 2012 Western European revenue to be around $45 million in current dollars. IDC positioned Acronis as a contender in this IDC MarketScape.

Overview of Product Releases, Road Map, and Customers in Western Europe

- Acronis Backup & Recovery 10, a next-generation product of Acronis’ True Image product line (disk imaging technology), including data deduplication (released in July 2009)
- Acronis Backup & Recovery 11 (released in June 2011)
- Acronis Backup & Recovery 11.5 (released in September 2012)
- Acronis vmProtect 8 for vSphere (released in September 2012)
- Acronis vmProtect9 (released in August 2013)
- Acronis True Image 2014 (released in August 2013)

Unique Differentiator

Acronis’ success stems from its patented imaging technology, which enables customers to do bare-metal recovery on dissimilar hardware and migrate workloads between physical and virtual servers.

Originally starting in the consumer and SMB market, Acronis has increasingly designed its product for scalability and is now moving up the market. In the past year, Acronis invested a lot in enterprise features such as application agents and management tools. Management and automation features have been added to eliminate repetitive manual tasks and manage larger installations with the same personnel. The company has strength in multi-hypervisor and cloud storage environments and has developed a strong vision under its new management.
Strengths

- Acronis developed a strong vision for the company and the product to improve scalability and enterprise readiness as well as provide enterprise-class synchronization and file sharing capabilities across PCs, laptops, and mobile devices like tablets and smartphones. The first step toward enterprise-class synchronization is the acquisition of GroupLogic in September 2012.

- Acronis Backup & Recovery works well in virtual environments and enables customers to migrate workloads from physical to virtual machines, between virtual machines, and back to physical machines if needed.

- Due to its SMB heritage, Acronis focuses on intuitive user interfaces for ease of use as well as affordable price points and licensing structures.

Areas for Improvement

Acronis needs to add more agents to its products to provide application-aware, file-level backups. The first steps have already been taken into this direction with the addition of the Microsoft agents for Exchange server, SQL server, SharePoint server, and active directory in Acronis Backup & Recovery 11.5. More agents will follow, and the question is how quickly Acronis can execute on its strategy.

Customer Feedback

- Customers value:
  - Affordability of product
  - Hardware-independent restore
  - Good customer service and direct contact with vendor

- Customers suggest:
  - Agent rollout needs to be even more automated
  - Capacity-based licensing needs to be introduced

Recommendation

IDC recommends this product for customers in the SMB and upper midmarket with a mix of physical and virtual infrastructures, primarily Microsoft applications.

ASG Software Solutions (Formerly Atempo)

Atempo was acquired by ASG Software Solutions in 2011. ASG focuses on the automation and management of complex IT systems and acquired Atempo due to its ability to backup heterogeneous infrastructures. Atempo's product portfolio has been renamed ASG Data Protection and has a strong customer base in France. ASG also sells in other European countries particularly Germany and the U.K., where it has some large and midsize customers.
ASG-Time Navigator has a diversified customer base, spanning from public sector (healthcare, higher education) to banking. ASG's success is to a large extent driven by its ability to develop a tailored and flexible pricing model for each vertical, which is associated with the cost drivers in this vertical (hospital beds, number of students, etc.). This pricing model simplifies data protection budgeting for ASG's customers as it is so closely aligned with their core businesses.

ASG Data Protection also has a strong customer base in the media and entertainment markets due to its heterogeneous operating system support and the scalability of its archiving product ASG-Digital Archive. ASG also offers ASG-Live Navigator, which is a backup solution for laptops.

In the past two years, Atempo has focused its development efforts on solutions for the Microsoft product portfolio and all virtualization solutions. IDC estimates Atempo's 2012 revenue to be $21 million in current dollars. IDC positioned Atempo as a contender in this IDC MarketScape.

**Overview of Product Releases, Road Map, and Customers in Western Europe**

- ASG-Time Navigator 4.3 SP2 (March 2013)
- ASG-Live Navigator 3.1 SP1 (July 2013)
- ASG-Time Navigator 4.3 SP3 (will be launched in September 2013)
- ASG-Live Navigator 3.1 SP3 (will be launched in September 2013)

**Unique Differentiator**

ASG offers a scalable data protection solution for high-performance heterogeneous environments and protects different platforms, from desktops and laptops to servers. ASG also offers an archiving solution. ASG’s focus on the backward compatibility of its products is a big benefit for its customer base, but it sometimes slows down the company in bringing new features to the market. Under ASG’s management, the R&D pace has been accelerated.

**Strengths**

- Multiplatform support
- Support for desktops/laptops and servers
- Flexible pricing

**Areas for Improvement**

- Need a better channel network in Europe
- Need to increase support services in Europe
- Need to work on a closer integration with the rest of the ASG product portfolio
**Customer Feedback**

✧ Customers value:

- Flexibility in pricing
- Scalability of product
- Heterogeneity of operating systems and applications support

✧ Customers are concerned about:

- Support services
- Future development of product, speed of innovation

**Recommendation**

IDC observes that Atempo-Time Navigator is used by customers that require backward compatibility or a flexible business-driven pricing model.

**CA Technologies**

CA Technologies sells its backup and recovery products from a separate data management business unit. This business targets primarily the SMB and small enterprise segment, and all of the business is transacted through the channel. This is different from CA's core business of IT service management software, which targets the very large enterprise segment and primarily sells through a direct sales force. CA acquired replication and high-availability vendor XOsoft in 2006 and developed its own disk-based data protection solution in 2010. The company now offers a broad portfolio around data protection, replication, and high availability. According to IDC's European Software Tracker, IDC estimates CA's Western European 2012 revenue to be around $58 million in current dollars. IDC positioned CA as a contender in this IDC MarketScape.

**Overview of Product Releases, Road Map, and Customers in Western Europe**

The ARCserve r16 product family was launched in September 2011.

**Unique Differentiator**

The focus of the CA ARCserve product line is on the recoverability and high availability of applications, which stem both from the XOsoft acquisition and the D2D image-based product. CA developed a platform strategy for its products where it wants to cover all data-protection-related needs from one integrated product platform. However, this vision will take some time to come to fruition.

CA ARCserve sells primarily to the SMB segment but is used in larger installations as well, both in enterprises and at service provider sites.
Strengths

☐ CA rebuilt its channel for data protection products after trying to sell these products directly for some years in the past.

☐ CA bundles its products into attractively priced packages and includes its deduplication option for free.

☐ CA has developed a platform vision for its data protection products.

Areas for Improvement

CA needs to raise its profile in the data protection market. It does not have the same brand recognition as its competitors, and it is not investing as much into marketing as its peers.

Customer Feedback

☐ Customers value:

- CA ARCserve D2D product, which provides image-based incremental backups in an efficient way for virtual environments
- Possibility to protect both physical and virtual environments from the same management interface
- Tape support
- Quality of support services

☐ Customers are concerned about:

- Product capabilities and features for virtual environments
- Maintenance and support costs

Recommendation

CA ARCserve is primarily used in small and midsize companies that require tape support.

CommVault

CommVault was founded as an independent company in 1996 and has since grown organically based on the development of its Simpana product. According to IDC's European Software Tracker, CommVault's 2012 estimated revenue in Western Europe is approximately $70 million in current dollars. CommVault has a direct presence in all 16 Western European countries and serves the European market exclusively through its channel partner network, but it also provides direct services and support where necessary. Through its OEM and strategic partnerships, CommVault has a broader reach than a company of its size typically has, as it can benefit from the market presence and reach of its partners. IDC positioned CommVault as a leader in this IDC MarketScape.
CommVault evolved from serving primarily the midmarket to focusing primarily on the enterprise segment, with the related changes in sales force and services capabilities. Its partnership with HDS also helped CommVault address enterprise customers. Midmarket customers are still a key customer segment and are primarily served through the channel.

**Overview of Product Releases, Road Map, and Customers in Western Europe**

- Simpana 9 (launched on October 5, 2010, and since then it has been updated with three major service packs)
- Large Service Pack 3 (released on February 1, 2012)
- Simpana 10 (released in February 2013)
- Simpana is used by 15,000 customers globally and approximately 5,000 customers in Western Europe

**Unique Differentiator**

CommVault Simpana has from its inception been built on one platform, with modules for backup, archiving, replication, resource management, and reporting building on top the common platform. Consequently, there is only one management interface to use for several data-related tasks such as backup, archiving, replication, and management and reporting. This capability was enhanced through CommVault's February launch of its Simpana 10 OnePass feature, which combines backup, archiving, and reporting into one process. Another innovative feature added in Simpana 10 is the CommVault Edge product, which allows customers to access and share files from mobile devices.

CommVault continuously adds features to the product and is currently the only vendor to offer data deduplication for tape environments. CommVault also offers a broad range of snapshot management and array support options through its SnapProtect feature and has deep technology integration with a number of storage hardware and services partners like Fujitsu, NetApp, HDS, and Group Bull.

**Strengths**

- CommVault offers a single product that covers several facets of data management like backup for servers and laptops/desktops, archiving, management/reporting, and replication. IDC rated CommVault higher in functionality/offering delivered because of this.
- OEM partners enhance the product through integration with CommVault's snapshot management feature. IDC rated CommVault higher in portfolio benefits delivered and in range of services capabilities.
- The product can be acquired as a software product from CommVault's partner channel and as an appliance from CommVault's OEM partners. IDC rated CommVault higher in delivery model because of this.
- CommVault continues to build out its services offerings in Europe and offers a wide range of architectural and implementation services in each European country, both from CommVault directly and through its partners. IDC rated CommVault higher in range of services strategy as a result of this.
Areas for Improvement

- While the CommVault staff is very dedicated to providing excellent customer service, resources are sometimes stretched thin due to careful expansion and cost management plans, which can result in longer response times. IDC rated CommVault lower in customer services capabilities and strategy as a result of this.

- In terms of flexibility and simplicity in licensing, customers that are not using the whole suite of features find that they are paying a premium price, which is a challenge in uncertain economic times. IDC rated CommVault lower in pricing model for both strategy and capabilities as a result of this.

Customer Feedback

- Customers value:
  - Simplicity and reliability of the backup process and that they are able to recover even in challenging situations
  - Richness of product features and forward-thinking product road map
  - Customer service and direct interaction with CommVault staff

- Customers are concerned about:
  - Pricing, they but find the product worth the premium that they are paying
  - Reporting needs to be simplified

Recommendation

CommVault Simpana is mostly used by customers in the midmarket or the enterprise segment with a moderately complex or complex IT infrastructure containing both physical and virtual servers, particularly where there is a need to backup to tape and deduplicate tape environments.

Dell (Including Quest Software)

Dell acquired Quest Software in September 2012 as a foundation for its software group because of Quest Software’s extensive IT and data management assets. Dell has created a data protection group within the software group that combines Quest Software’s data protection products (NetVault, LiteSpeed, vRanger) with Dell’s products (AppAssure and SonicWALL CDP). Dell has a large and expanding customer base globally and is investing heavily in the European market where it is slightly underpenetrated at the moment.
With the Quest acquisition, Dell acquired a company with several data protection products. Quest was founded in 1987, and in 2008 it decided to build out its data protection portfolio beyond its LiteSpeed and SharePlex Oracle backup, recovery, and replication products. Quest's first foray into expanding its data protection portfolio was the 2008 acquisition of Vizioncore, a provider of data protection and recovery solutions for virtual environments. Quest fleshed out its data protection portfolio with the acquisition of traditional backup-to-tape provider BakBone in 2010. Since the BakBone acquisition, Quest has been streamlining its diverse data protection portfolio. As a starting point, the naming convention has been changed into "NetVault ..." except for the vRanger product, which is targeted solely at the virtual server market. Dell has continued to rationalize its portfolio in the data protection space and is working toward a common management layer, where the various products will become "consumerable services" over time. IDC positioned Dell as a contender in this IDC MarketScape.

According to IDC's European Software Tracker, Dell's estimated 2012 data protection revenue in Western Europe is approximately $30 million in current dollars. Dell has a direct presence in all 16 Western European countries and serves the European market exclusively through its channel partner network, but it also provides direct services and support where necessary. Germany, Benelux, France, and the U.K. are the biggest markets for Dell in Europe.

**Overview of Product Releases, Road Map, and Customers in Western Europe**

- Dell AppAssure 5
- NetVault Backup 8.6 (released October 2011)
- NetVault has 17,000 customers globally, approximately 4,000 of which are based in Western Europe
- vRanger 5.4 was released in May 2012, and vRanger 6 was released in August 2012 (after the interview has been conducted)
- vRanger has 40,000 customers globally, of which approximately 10,000 are based in Western Europe
- Related data protection products are NetVault FastRecover (continuous data protection) and NetVault SmartDisk (disk-to-disk backup and data deduplication appliance)

**Unique Differentiator**

Dell has a portfolio of internally developed application-specific data protection products like NetVault LiteSpeed, a traditional broad brush data protection product like NetVault, and a specialized product for virtual servers in vRanger. With NetVault Extended Architecture (launched in June 2012 prior to the acquisition by Dell), Quest attempted to unify its various data protection assets and apply its systems management knowledge from other areas of the Quest business to data protection. NetVault has traditionally had a strong adoption in the Linux user base. Dell is continuing to rationalize its portfolio and move to a portfolio of data protection services based on the various products.
Dell's unique differentiator is its strong vision and commitment to the data protection market, which will only be augmented through the synergies between the data protection products and other parts of Dell software and hardware. Midmarket and enterprise storage is a strong focus area for Dell, and data protection remains a core process in enterprise storage. Quest had put the data protection development teams on an agile methodology to release new features to the market more frequently, and Dell is continuing this approach. This is transforming the NetVault product from a late provider of innovative features into a more current product.

**Strengths**

- Dell is committed to being successful in the storage market, particularly in the data protection market. Dell is going to allocate the necessary resources to make AppAssure, NetVault, and vRanger a success. IDC rated Dell above average in offering strategy as a result of this resource commitment.

- Dell developed a strong vision about how to unify its various data protection assets as well as leverage the systems management and application management skills from the greater Quest software portfolio. IDC rated Dell higher in portfolio strategy because of this.

- NetVault has a broad and loyal customer base in the Linux community, and vRanger and AppAssure have broad adoption in virtual server environments. IDC rated Dell higher in customer service capabilities as a result of the loyal customer base.

**Areas for Improvement**

- Dell has a broad portfolio of data protection assets that are to date still relatively unrelated. Streamlining this portfolio both in terms of messaging as well as interoperability and management interface is one of the core tasks for Dell.

- NetVault has traditionally been a product that brought new features late to market. This is currently being addressed with the implementation of an agile development process, but Dell needs to balance the need for new features with the necessary integration efforts to create one portfolio and a single management interface. IDC rated Dell lower in innovation and R&D pace and productivity as a result of this.

**Customer Feedback**

- Customers value:
  - Ease of use of the product
  - Virtualization features

- Customers are concerned about:
  - Interoperability and common management of data protection products
  - Scalability of product
Recommendation

Small to midsize customers that still use tape backup and have Linux in their environments should consider NetVault. Small to midsize customers with predominantly virtual servers should consider vRanger or AppAssure.

EMC

EMC acquired Legato for the NetWorker product in 2003 and has since acquired several other software and hardware assets in the data protection space, most prominently Avamar in 2006 and Data Domain in 2009. EMC also has a substantial storage hardware business, with a product line ranging from low-end to high-end hardware. Other divisions cover content management and archiving as well as security. IDC estimates EMC’s European data protection revenues to be $134 million in 2012 in current dollars. IDC positioned EMC as a leader in this IDC MarketScape.

Overview of Product Releases, Road Map, and Customers in Western Europe

- Networker 8 (released in July 2012)
- Avamar 6.1 (released in May 2012)

Unique Differentiator

With the release of NetWorker 8, EMC clearly positioned itself in the disk-based backup space. EMC completely rewrote the code of the product to transition it from a tape-centric product to a disk-centric product. The tight integration with Data Domain is a key success factor for EMC NetWorker. Ultimately, NetWorker and Avamar will converge, but that is going to take a few more years. EMC is also working very closely with VMware to ensure tight integration between its data protection products and the VMware application programming interfaces (APIs). Big Data and cloud are other key messages that EMC brings to market.

Strengths

- EMC has a broad and loyal customer base in Europe.
- EMC uses its Big Data solutions to provide efficient customer service.
- EMC has a strong storage hardware and Data Domain appliance business.

Areas for Improvement

- EMC leaves the still significant segment of tape customers behind.
- EMC is known for its aggressive sales force.
- EMC does not focus as much on NetWorker as on other parts of its data protection portfolio
**Customer Feedback**

- Customers value:
  - Enterprise-grade scalability of the product
  - Customer service
  - Deduplication capability that comes from the integration with Data Domain

- Customers are concerned about:
  - Declining support for tape
  - Products/solutions as rather expensive and the licensing complex

**Recommendation**

IDC notes this product is predominantly used in the enterprise segment and in the high end of the midmarket.

**HP Autonomy**

HP acquired Autonomy in 2011 and has since merged its information management products including Data Protector into its new HP Autonomy business unit. From the Autonomy acquisition, HP also acquired two cloud-based backup services: Connected for PC backup and LiveVault for server backup to the cloud. These products came to Autonomy through the acquisition of Iron Mountain Digital's technology assets. Under the new management of the Autonomy business unit, HP is focusing on providing a superior customer experience, providing a clear product strategy with upgrade paths for customers, and a "best on HP infrastructure" strategy, with tight integration with HP's storage hardware business. IDC estimates HP's European Data Protector revenue to be $120 million in 2012 in current dollars. IDC positioned HP as a major player in this IDC MarketScape.

**Overview of Product Releases, Road Map, and Customers in Western Europe**

- HP Data Protector V7 was released in June 2012.
- HP Data Protector v8 was released in June 2013.
- HP Autonomy has more than 60,000 data protection customers globally, of which about 20,000 are based in Europe, according to IDC estimates.

**Unique Differentiator**

The big asset Autonomy brings to HP from a storage perspective is its IDOL (intelligent data operating layer) technology, which enables machines to understand the meaning of texts, consequently enabling storage managers to set storage policies and make decisions based on meaning. IDOL has been integrated with HP Data Protector in the June 2012 release.
Strengths

- HP has a strong vision for its information management business (under the HP Autonomy business unit).
- HP has a strong storage hardware portfolio, and the integration with the StoreOnce appliance provides data deduplication and an appliance approach to data protection.

Areas for Improvement

- Despite its large installed base, HP is not yet perceived as an independent data protection software vendor by many IT managers. This is changing after the acquisition of Autonomy, which has been known to sell software-based data protection solutions in Europe.
- HP has been slow to introduce innovative features such as data deduplication. However, with the tighter integration with the StoreOnce product and the Autonomy assets, HP now has both appliance-based solutions and cloud-based backup solutions in its portfolio.
- HP needs to rationalize its portfolio and provide transition paths for its customers, which have been developed during the last year.

Customer Feedback

- Customers value:
  - Simplicity of licensing model
  - Customer support
- Customers are concerned about:
  - HP’s post-acquisition turmoil and how it will affect product development and customer service

Recommendation

IDC notes that HP Data Protector is mainly used by HP storage and server customers in the midmarket and lower enterprise market.

IBM

IBM acquired Tivoli Software in 1996 and has since developed the Tivoli Storage Manager (TSM) backup and recovery product. According to IDC’s European software tracker, IDC estimates IBM’s revenue in Western Europe to be approximately $243 million in 2012 in current dollars. IBM has a direct presence in all 16 Western European countries and serves the European market directly and through its channel partner network. In 2012, IBM acquired U.K.-based Butterfly Software, a privately held data analysis and data migration company, which performs analysis of the cost and efficiency of data protection infrastructures and enables migrations to IBM TSM. IBM offers all storage-related services through IBM Global Services and through its partner community.

IDC positioned IBM as a major player in this IDC MarketScape.
Overview of Product Releases, Road Map, and Customers in Western Europe

- TSM version 6.3 for servers
- TSM version 6.4 client for virtual environments

Unique Differentiator

IBM TSM manages data at the data object level and not at the server level. This enables IBM TSM to be a very efficient and scalable data protection product, which only backs up changed data objects (progressive incremental forever technology) and scales up to 4 billion data objects that can be managed with one TSM server. IBM TSM uses a DB2 database to keep track of all data objects. This product architecture eliminates the need for the proliferation of media servers and enables the scalability of the product. IBM offers very flexible trust-based licensing terms.

Strengths

- IBM is a large global corporation with a large customer installed base and a large customer support organization.
- IBM has a strong vision to apply IT to create a "smarter planet," and the TSM product is supporting this vision through efficiency, scalability, and management improvements. TSM also fits within IBM's broader Tivoli portfolio, which is centered on datacenter automation.

Areas for Improvement

- IBM sometimes takes time to include the newest features into the product. However, many customers are happy to wait for IBM to do it properly rather than fast.

Customer Feedback

- Customers value:
  - Scalability of products
  - Efficiency in managing large installations
  - Flexibility in licensing
  - Services-based approach through Butterfly Software that shows a clear migration path

- Customers are concerned about:
  - Speed of release of new features

Recommendation

IDC notes this product is typically used by large financial institutions and large services providers that need the scalability and management capabilities.
**Symantec**

Symantec acquired Veritas in 2005 and offers both the NetBackup product for enterprise customers and the Backup Exec product for the SMB market. In 2011, Symantec started to launch backup appliances under its own brand, which were made widely available in Europe during 2012 and have seen fast uptake from European users. Symantec is clearly the market leader in the data protection market in terms of market share, and IDC estimates its 2012 data protection revenues to be $364 million in current dollars. Symantec has currently undergone a change in its top management. Steve Bennett replaced Enrique Salem as CEO in July 2012. In January 2013, Steve Bennett announced the new strategy for Symantec, which will focus on solving customer problems better than its competitors. IDC positioned Symantec as a leader in this IDC MarketScape.

**Overview of Product Releases, Road Map, and Customers in Western Europe**

- NetBackup 7.5 (released in February 2012)
- Backup Exec 2012 (released in February 2012)

**Unique Differentiator**

Symantec NetBackup has the broadest support for both applications and operating systems, while Backup Exec is an easy-to-use product for the Windows platform. Symantec NetBackup integrates through its open storage (OST) API with deduplication appliances to achieve fast backups. Symantec now also sells both NetBackup and Backup Exec appliances in Europe. Symantec also offers archiving and ediscovery solutions that are tightly integrated with its backup products.

**Strengths**

- Large and loyal customer base that provides great feedback for innovation and development of the products
- Strong channel and partner ecosystem
- Strong storage and infrastructure focus of the company

**Areas for Improvement**

- Need to execute on the new strategy and stabilize after the top management change
- Need to provide a clear transition path from Backup Exec to NetBackup

**Customer Feedback**

- Customers value:
  - Rich feature set for NetBackup, ease of use for Backup Exec
  - Good customer support
  - Appliance option
  - Good performance, low overhead on servers
Customers are concerned about:

- The Backup Exec 2012 launch originally annoyed many customers due to the comprehensive overhaul of its user interface. However, Symantec reacted swiftly and improved the UI to satisfy customer demands.
- Deduplication pricing can become expensive.

**Recommendation**

IDC observes that NetBackup is used by large enterprises, and Backup Exec is mainly used by Windows-centric SMBs.

**Veeam**

Veeam was founded in 2006 by the team previously behind Aelita Software, well known for its Windows Server management solutions. In 2008, Veeam acquired nworks, adding solutions that bridge the gap between VMware and enterprise management systems from Microsoft and HP. Veeam's backup product was developed specifically for the virtual environment and does not support backup of physical machines. Veeam is selling 100% through its channel — which is mainly VMware and to a growing extent the Microsoft channel — and also sells through downloads from its website. According to IDC’s European Software Tracker, Veeam had European revenues of $55 million in 2012 in current dollars. Veeam is privately held. IDC positioned Veeam as a major player in this IDC MarketScape.

**Overview of Product Releases, Road Map, and Customers in Western Europe**

- Veeam Backup & Replication version 6.1 (released in June 2012)

**Unique Differentiator**

Veeam Backup & Replication software has been developed specifically for virtual environments and is sold primarily to the virtualization administrator or the backup administrator for virtual environments.

**Strengths**

- Veeam is a fast-growing, dynamic company, dedicated to developing easy-to-use products for virtual environments.
- Veeam is a profitable privately held company, which has access to the necessary funding to support its high growth.
- Veeam is creating large mindshare through its presence at trade show presence and social media engagement.

**Areas for Improvement**

Veeam is successful as a niche provider of backup for virtual environments, but it does not provide a backup strategy or integration for heterogeneous virtual and physical environments.
Customer Feedback

- Customers value:
  - Product quality (no need to use customer service)
  - Low price
  - Ease of use

- Customers are concerned about:
  - No option for backup of physical servers
  - No tape support

Recommendation

Veeam’s backup and replication product is primarily used by small and midsize organizations with a high degree of virtualization.

ESSENTIAL GUIDANCE

This IDC MarketScape evaluates the current capabilities and future strategies of 10 providers in the European data protection and recovery software market, which is a mature space. The scoring and weighting in this IDC MarketScape is designed to balance future requirements with current offerings and expected capabilities in three to five years.

Data protection and recovery software purchase decisions for both enterprise and SMB customers will be shaped by the need to efficiently backup large and growing volumes of data in physical, virtual, and cloud environments. In the longer term, the data protection and recovery software products that are innovative and able to fit into the larger software-defined datacenter vision as well as the automation and orchestration frameworks will emerge as market leaders.

Advice for Data Protection and Recovery Software Buyers

- **Move toward a platform approach to data protection.** Instead of managing point products for each storage-related task (backup, archiving, replication, etc.), it is more efficient to design data management services that take into account performance, availability, and retention requirement, and manage data accordingly.

- **Consider data protection as one part of your software-defined datacenter.** Storage, particularly data protection, is an essential component of the software-defined datacenter. Consequently, data protection needs to become a service under a data management service catalog that manages data backup and retention according to defined service levels.
Investigate the value of alternative delivery models. Cloud storage is rapidly maturing into a valid alternative to traditional on-premises deployment models. Investigate if your organization can benefit from the deployment of cloud storage services. Appliances are also increasingly popular as a delivery model, and many organizations benefit from acquiring storage software in the appliance form factor.

Advice for Data Protection and Recovery Software Providers

Move toward integrated data management solutions. The data protection and recovery software market remains fragmented with many point solutions available. Moving forward, buyers will want to buy integrated solutions for data management that solve their problems related to backup, archiving, and disaster recovery.

Focus on the management of backup as part of a broader datacenter management framework. As customers are building their private clouds and moving toward a software-defined datacenter, it is important that data protection and recovery also becomes a resource that is easily managed as part of a broader service. Consequently, vendors will need to focus on making their software manageable through other management technologies like VMware vCenter and others.

Support alternative delivery models like cloud and appliances. Cloud delivery models are getting increasingly accepted in the European user base, and vendors should provide a SaaS option for product delivery. Appliances are also gaining acceptance due to their ease of use, and vendors should consider bringing their products to market in an appliance form factor.

LEARN MORE

Related Research

Western Europe Storage Software 2013–2017 Forecast (IDC #IM01V, August 2013)

European Storage Software Competitive Vendor Shares, 2012 (IDC #IM02V, July 2013)

Big Data in Europe in 2013: Hadoop Starts to Emerge (IDC #LT01V, May 2013)

2013 End-User Software Trends in Europe (IDC #LC52V, May 2013)

2013 European End-User Trends: IT and Business Priorities (IDC #LC05V, May 2013)


Assessing the Impact of the European Macroeconomic Environment on Software Spend in Western Europe in 2013 and Beyond (IDC #LC04V, April 2013)
Synopsis

This IDC study presents a vendor assessment of the European data protection and recovery software market through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that explain success in this market. This IDC MarketScape covers a variety of vendors participating in the European data protection and recovery software market. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and one another and highlights the factors expected to be the most influential for success in the market in both the short and long term.

“All the vendors covered in this analysis generally provide mature product offerings with similar strengths and weaknesses. However, emerging technologies across virtualization and cloud may prove to be game changers in the next few years,” said Carla Arend, program director, European Information Strategies for IDC.

Copyright Notice

This IDC research document was published as part of an IDC continuous intelligence service, providing written research, analyst interactions, telebriefings, and conferences. Visit www.idc.com to learn more about IDC subscription and consulting services. To view a list of IDC offices worldwide, visit www.idc.com/offices. Please contact the IDC Hotline at 800.343.4952, ext. 7988 (or +1.508.988.7988) or sales@idc.com for information on applying the price of this document toward the purchase of an IDC service or for information on additional copies or Web rights.

Copyright 2013 IDC. Reproduction is forbidden unless authorized. All rights reserved.