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Handicapping the Backup Race. By 2004/05, conventional tape-based backup/restore processes and software products will be obsolete. Instead, enterprise operations will implement automated data protection processes using disk replication technologies and storage management software. Vendors should be selected accordingly.

META Trend: Information availability requirements will dictate robust business continuance (BC) strategies based primarily on backup/recovery (B/R) implementations, with unified management but decentralized execution. By 2002/03, most data center BC plans will include Unix/NT applications. Through 2003/04 (as data volumes increase 200%-300%/year), users will reduce B/R windows using intelligent storage, highly parallel tape solutions, and Fibre Channel-based storage-area networks.

As IT organizations consolidate storage and transition to holistic data protection, it will become necessary to standardize on the appropriate data protection (a.k.a. backup/recovery) software vendor. By 2004/05, only four vendors will offer enterprise-worthy data protection product lines for distributed systems (i.e., Veritas, Legato, Tivoli, and CommVault). Important evaluation criteria include assessing the vendor's ability to: 1) meet current backup requirements; 2) deliver the next generation of data protection software (e.g., recover data from tape and disk-based sources); 3) leverage networked storage; and 4) provide enterprisewide data protection (e.g., for multiple OSs and RDBMSs).

These criteria are used to stratify the vendor community into three categories: the leader, the challengers, and the chasers. Although the chasers may provide acceptable solutions for certain applications, we believe the leader and the challengers represent a vendor shortlist for enterprise situations.

The Leader

Veritas Software: Since its acquisition of OpenVision in 1998, Veritas has steadily built a product suite that makes it the vendor delivering the most comprehensive data protection software. Veritas's flagship backup product, NetBackup, is complemented by and leverages its File System, Volume Manager, and Storage Migrator (HSM [hierarchical storage management]) as well as clustering. In addition to meeting current requirements, Veritas is well positioned with its data replication and high-availability product to manage data protection needs through 2006/07.

Lack of integration between NetBackup and Backup Exec is Veritas's most obvious shortcoming. Although NetBackup supports Windows, many users choose Backup Exec for Windows environments (for its simpler implementation and administration), and NetBackup for Unix or mixed environments. Currently, these two products cannot be commonly administered (though simple alerts can be aggregated through its Global Data Manager), nor can they share tape drives or libraries.

The Challengers

Legato Systems: Legato's NetWorker product was comparable to Veritas's NetBackup until Legato lost its market momentum after revealing questionable accounting and sales practices, as well as failing to "digest" its many acquisitions to counter Veritas's capabilities. Furthermore, Legato's Celestra server-less backup product has never reached critical market mass (due to technical complexity and lack of OS support). Nevertheless, NetWorker is a solid product with proven capabilities. With a change in top management and a

Business Impact

Data protection can no longer be limited to backup and recovery. Deploying rapid recovery products and methodologies can produce significant cost savings (and revenue generation) by reducing application downtime.

refocus on core businesses, Legato will regain its position as a healthy competitor.

Tivoli Systems: Tivoli Storage Manager (TSM), formerly IBM's ADSM, arguably has the broadest platform coverage, with integration to both mainframe and AS/400 backup products (e.g., backup/recovery and media management services with media management and scheduling only). TSM pre-stages its backups to disk, positioning it well to manage data restoration from either tape or disk. It also offers the most feature-rich HSM solution. However, TSM's strategy of "full backup once and incrementals forever" has led to performance bottlenecks in some configurations (particularly in restores, the most important factor of configurations). Tivoli has also been slow to adopt new technology compared to Veritas (e.g., integration with disk storage vendors, LAN-free and serverless backup).

CommVault Systems: After its spinoff from AT&T in 1996, CommVault used its resources to completely rearchitect its product. The result, Galaxy, contains many advanced policy-based features that make it well suited to global enterprise deployment. It offers centralized management with distributed processing to ensure that corporate data protection standards are implemented. Furthermore, Galaxy was architected with holistic data protection in mind by incorporating the ability to restore data from tape and disk sources alike. Having been introduced for initial shipment in 1Q00, Galaxy does not have as much "mileage" on it as the leader and other challengers do. Although CommVault's challenge will be to gain critical mass in an industry that has consolidated and matured during the past three years, the product is sufficiently compelling to gain critical mass.

The Chasers

Hewlett-Packard: OmniBack II has enjoyed success within HP's installed base, yet has seen very little success in multi-OS environments. Unfortunately, lack of attention from HP allowed OmniBack II to slip into the category of industry "chaser." HP has only recently

provided support for Solaris (1Q01) as a backup server, and still does not support AIX or Linux, which is out of step with HP's strong market push toward Linux. However, the new HP senior storage management team has a fresh perspective and a solid vision of future data protection requirements. If HP can execute on its vision, OmniBack will become a challenger.

BakBone Software: Like CommVault, BakBone spun away from AT&T to create a fresh backup and recovery product. BakBone's NetVault offers many features for current storage-area network (SAN)/network-attached storage (NAS) requirements (e.g., NDMP support for NAS appliances and dynamically shareable devices). Like Galaxy, NetVault has been on the market for a relatively short amount of time. However, the company does not appear to have any vision for managing data recovery from any source other than tape. This lack of vision could limit the product's appeal after 2003/04.

Syncsort: Syncsort's Backup Express platform support extends from Windows, through Unix, and onto the mainframe. Many of Syncsort's users praise the product's performance and personalized technical support. Nevertheless, Syncsort has never been able to break free of its niche image to become a serious industry challenger.

Computer Associates (CA): ARCserve 2000, the current incarnation of ARCserve, is best known for its ease of deployment and use. ARCserve has strong market share in Windows and Novell NetWare environments, but has never established itself in the Unix data center. Although CA touts ARCserve as a scalable enterprise tool, the company most often compares ARCserve to Veritas's low-end Backup Exec product, not NetBackup. CA lagged behind Veritas in introducing important new functionality (e.g., Windows 2000 and Exchange 2000 support). Furthermore, we believe CA lacks the vision for supporting future data recovery technologies (e.g., disk-based data replication), and it does not have a compelling story regarding its high-end Unix backup/recovery software Alexandria (from its Sterling Software acquisition).

Bottom Line

For niche applications, users can select any appropriate backup and recovery product. For a comprehensive enterprise backup/recovery infrastructure, however, only the leader and challengers should be considered.

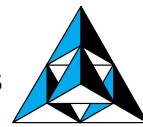
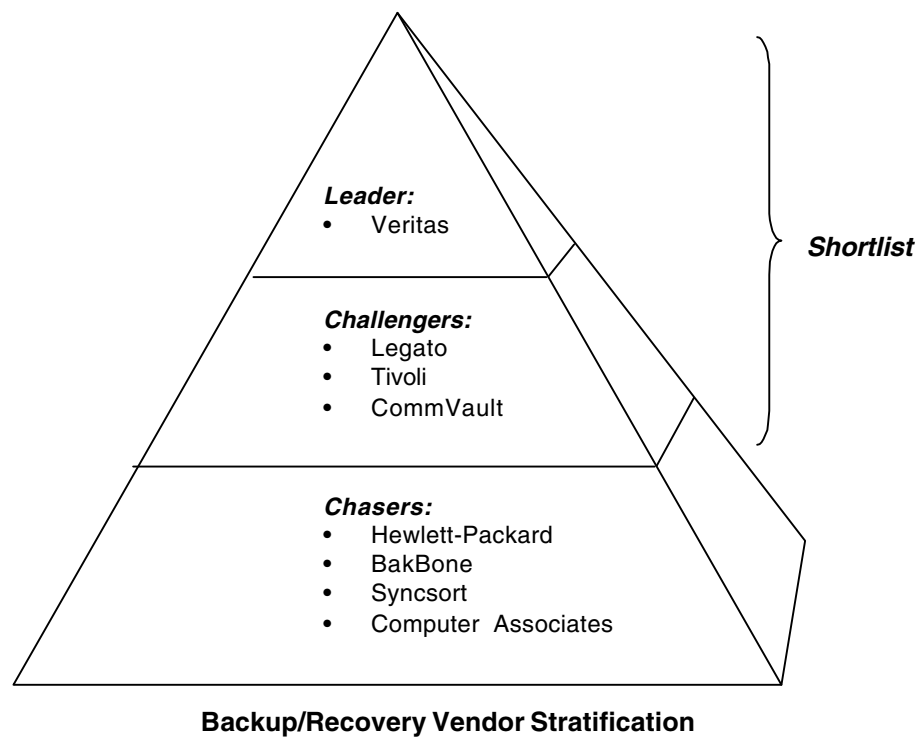


Figure 1 — Backup/Recovery Vendors: Leader, Challengers, and Chasers



Source: META Group

META Delta
