

# **Data protection and recovery in the Small-Midsized Business (SMB)**

*An SSG-NOW Outlook Report*

*October 2011*

## **Introduction**

### **SSG-NOW Opinion**

The market for data protection in small and mid-sized businesses, comprised of 1-999 employees, is growing quickly as the market economics change, as businesses are starting to free up money for spending and as they realized that protecting their assets is mandatory to the continuance of the business.

### **In This Study**

This study provides a market sizing of the data protection market for small and mid-sized businesses in the United States in 2011. Coverage includes data protection software delivered as software/appliances and hosted services.

### **Market Definition**

Data protection applications, whether traditional backup and recovery, snapshotting, replication, mirroring, server fail-over or disaster recovery – provide an automated and efficient way of storing and protecting application data on file servers, laptops and desktops. Backup and retrieval solutions are designed to provide regularly scheduled copies of a server or disk to enable the capability to bring data and applications back up and running after the server or disk fails.

Included in this study are software applications regardless of whether they are delivered as on-premises software (sometimes preinstalled on an appliance) or as a hosted service.

## **Methodology**

SSG-NOW industry analysts have been measuring and analyzing the data protection market for a combined 30 years. Our strategy for doing so incorporates information from different, but interrelated, sources:

- Census Information on the SMB market
- Interviews with market participants (vendors) to determine product information, market and channel strategy and pricing
- Product briefings, press releases and other publicly available information. At SSG-NOW, our analysts meet with hundreds of vendors each year. These briefings provide an opportunity to review current and future product strategies, customer bases, target markets and other key product information.
- SSG-NOW's user strategy interviews offer a compelling and consistent time-series view of industry trends and developments.

## **Situation Overview**

### Business Drivers and Market Trends

- SSG-NOW notes the following trends in the business drivers, competitive landscape and corporate purchasing behavior:
  - Data protection and recovery is the top motivator for SMBs
  - SMBs, like large enterprises, are experiencing explosive data growth patterns.
  - Like large enterprises, SMBs are also regulated by government and other compliance mandates. They must archive data and make sure that it is readily available.
  - Smaller businesses, especially in the 1-50 employee range, are often impacted by a lack of IT staff and resources.
  - SMBs are constrained in their spending on storage resources
  - SMBs are becoming increasingly aware of the requirements of protecting their data.
  - SMBs have several methods of data protection in tape ranging from tape to disk technology, but are adopting technologies such as replication, mirroring and deduplication
  - SMBs are excellent candidates for online data protection and cloud-based data protection

## **Data Protection Technologies**

### Media support

- Description of
- Implementation
- Considerations for SMBs
- Recommendations and Best Practices

### Backup and recovery software

- Description of
- Implementation
- Considerations for SMBs

## Recommendations and Best Practices

### Backing up virtual environments

- Description of Implementation
- Considerations for SMBs
- Recommendations and Best Practices

### Snapshot backups

- Description of Implementation
- Considerations for SMBs
- Recommendations and Best Practices

### Bare metal recovery

- Description of Implementation
- Considerations for SMBs
- Recommendations and Best Practices

### Deduplication

- Description of Implementation
- Considerations for SMBs
- Recommendations and Best Practices

### Continuous data protection

- Description of Implementation
- Considerations for SMBs
- Recommendations and Best Practices

### Replication

- Description of Implementation
- Considerations for SMBs
- Recommendations and Best Practices

### File versioning

- Description of Implementation
- Considerations for SMBs
- Recommendations and Best Practices

## Compression

- Description of Implementation
- Considerations for SMBs
- Recommendations and Best Practices

## Encryption

- Description of Implementation
- Considerations for SMBs
- Recommendations and Best Practices

## Server mirroring

- Description of Implementation
- Considerations for SMBs
- Recommendations and Best Practices

## Server failover

- Description of Implementation
- Considerations for SMBs
- Recommendations and Best Practices

## **Competitive Landscape**

### Software/Appliance and Cloud vendors

A Drive	Data Deposit Box (see KineticD)
Amanda.org	Data Preserve
Acronis	DROBO
Agility Recovery	Dell
Altaro	Digitiliti
AppAssure Software	Diligent (see IBM)
Arkeia Software	Double-Take Software (see Vision Solutions)
Asigra	Druva
Atempo	Econ Technologies
Autonomy	Egnyte
Axcient	EqualLogic (see Dell)
Barracuda Networks	EMC
Bacula	FalconStor Software
CA Technologies	Farstone
Carbonite	Geminare
Code 42	GFI
Cofio Software	Gladinet
CommVault Systems	Greenbytes
CTERA Networks	

HP  
I365, a Seagate Company  
IBackup (see Pro Softnet)  
IBM  
IceWeb  
Intronis  
Iomega  
Idera  
iDrive  
KineticD  
Macrium  
Microsoft  
NetApp (also see Syncsort)  
NETGEAR  
Neverfail Group  
Nexsan  
Nine Technology  
NovaStor  
Overland Storage  
Pro Softnet  
Quantum  
Quest Software  
Quorum Labs  
Rackspace  
Rebit  
Revinetix  
R1Soft

ROBODRS  
Roxio  
Scale Computing  
SEPATON  
SEP Software  
Sonic Solutions (see Roxio)  
SonicWall  
SOS OLB CA  
SpiderOak  
StorageCraft  
SugarSync  
Sungard  
Symantec  
Symform  
Syncsort  
Tandberg  
TeraByte Unlimited  
Tivoli (see IBM)  
Unitrends  
Veeam Software  
Vembu Technologies  
Venyu  
Vision Solutions  
Vizioncore (see Quest Software)  
Zenith Infotech  
Zmanda

### **Use case profiles**

Small businesses  
Mid-sized businesses  
MSP

### **Outlook**

Forecast and Assumptions  
Market Context

### **Recommendations and Guidance**

General backup and recovery recommendations and best practices for SMBs  
Suitability of product offerings for SMB market

### **List of Tables**