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Magic Quadrant for Disaster Recovery as a Service

Published: 19 June 2017 **ID:** G00311593

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Summary

The disaster-recovery-as-a-service market consists of hundreds of providers, all with different approaches and capabilities. This creates immense complexity around vendor selection. I&O leaders should use this Magic Quadrant to help them evaluate providers of DRaaS services.

Market Definition/Description

This document was revised on 27 June 2017. The document you are viewing is the corrected version. For more information, see the Corrections

(http://www.gartner.com/technology/about/policies/current_corrections.jsp) page on gartner.com.

Gartner defines disaster recovery as a service (DRaaS) as a service offering that includes replication of server workloads and recovery of such workloads, as needed, to a cloud with which the provider ultimately has fiscal responsibility. The service may be fully managed or self-service; replication and recovery may be high-touch or automated via software; and the target location and cloud infrastructure with which the workloads are replicated and recovered may be owned by the provider or a third party, such as a hyperscale public cloud provider. The key differentiating service attribute is that all elements must be included in the offering.

Current Market

As stated in the 2016 iteration of this Magic Quadrant, DRaaS is now a mainstream offering. In fact, Gartner estimates it to be a \$2.02 billion business currently, and it is expected to reach \$3.73 billion by 2021. Yet, just because it is mainstream does not make it less complex for potential customers to choose which offering is best for them.

Assessing the complexity of the DRaaS market starts with the number of providers in this space. If one merely looks at the number of "cloud partners" of commonly used replication products used by DRaaS providers (such as Zerto, Veeam, Carbonite DoubleTake, Asigra, Acronis and StorageCraft) as a proxy to determine the number of DRaaS providers, the number of providers is well north of 500. Zerto alone has over 300 cloud partners using its products for recovery.

Compounding that, each provider varies significantly across nine attributes:

1. Market size targeted by the provider: In this Magic Quadrant alone some providers' customer bases are 80% small businesses (with less than \$10 million in annual revenue); while some focus on different tiers of midmarket companies (ranging from lower tier at \$10 million to \$49 million; to midtier at \$50 million to \$249 million; to upper tier at \$250 million to \$999 million). Others are focused on 70% midsize enterprises (\$1 billion to \$3

billion) to large enterprises (more than \$3 billion). Enterprise size often ties into the price points, likely degree of focus with respect to DRaaS, and degree of direct intimacy in the sales experience.

2. Sales channel: Continuing with sales experience, some vendors sell directly to customers only, where some sell through channel partners only, and many have a mix. As a customer, there are benefits and issues to look out for each (see "Survey Analysis: Learn From Existing Disaster-Recovery-as-a-Service Customers" for some examples).
3. Replication: Some providers utilize their own intellectual property built from the ground up, others utilize intellectual property adopted through acquisition, and others do so via commercial off-the-shelf products (e.g., Zerto and Carbonite DoubleTake). This has implications for potential customers with respect to how pricing is typically established, level of control for the creation of future enhancements, flexibility toward utilizing different approaches that best suit the customer's needs, and likelihood of focus on other tangential value-adds such as business impact assessments (BIAs) and differentiated network-related enablers.
4. Recovery orchestration: Similarly, when it comes to the orchestrated recovery of underlying servers, data and network components, and related applications for both failover and failback, vendors differ in approach. Some vendors have their own intellectual property, and some utilize commercial off-the-shelf (COTS) products. More often than not, this tends to follow the vendor's replication approach – as more and more products perform both replication and orchestrated recovery (see "Market Guide for IT Resilience Orchestration Automation").
5. Data centers/recovery targets: Some vendors own their own data center locations and network-related elements such as dark fiber. For many providers, this proves to be a differentiator. For others, it can be an anchor that drains investment specific to DRaaS and/or limits the degree to which a provider is likely to champion other recovery target options such as hyperscale public cloud providers. Others utilize colocation providers such as Equinix, Interxion, CoreSite or Switch to quickly maximize geographically dispersed options (see "Innovation Insight for Data Center Colocation"). Meanwhile, other providers may leverage hyperscale public cloud providers for many of the same reasons, while also freeing up investments required in infrastructure as well.
6. Infrastructure used to recover: For vendors that have or are in the process of pivoting toward more use of hyperscale public cloud providers (such as Amazon Web Services [AWS], Microsoft Azure or Google Compute Platform [GCP]) to customers, prices are often attractive and allow recovery target options. But this approach can also dilute the vendor's overall value proposition, to the point where potential customers may question whether it is smarter over the long term to simply purchase software and manage disaster recovery themselves. Meanwhile, DRaaS providers that own their own infrastructure often have different degrees of shared or dedicated compute and storage options. Finally, some providers also supplement one or both of the approaches above with on-site devices (either hardware or software), which allow for localized recovery (note that 82% of unplanned downtime is attributed to application failures, hardware failures or operational errors and may not truly require off-site restoration).

7. **Recovery beyond x86 workloads:** When it comes to non-x86 server workloads (e.g., AIX, IBM System i, IBM System p, HP-UX, Oracle Solaris and mainframe), support greatly varies among DRaaS providers. This may range from: providers that do not support these workloads at all; providers that will only back them up; vendors that only provide colocation; and vendors that will integrate the commercially separate colocation workloads into the overall recovery plan; to vendors that offer recovery of those workload types as a specific DRaaS offering. Beyond server-based applications, some DRaaS providers have offerings that are tangential to DRaaS, yet complementary from a business recovery perspective. For example, some providers offer managed services, backup options, or recovery options for desktops, virtual desktops, mobile devices, SaaS, unified communications or office space itself.
8. **Support service options:** Some vendors only provide self-service options for customers; some provide self-service following a light onboarding process; some only provide fully managed service options; while others offer a mix of choices. These options have underpinning implications with regard to recovery responsibility, price points, SLA guarantees, frequency for testing, costs related to recovery, and ability for customers to use the environment for other purposes beyond disaster recovery. For context, the percentage of customer base for vendors in this Magic Quadrant is: 27% is self-service of some kind; 65% is some variation of fully managed; and 8% is a light support version.
9. **Primary focus:** For some vendors, the focus might be primarily disaster recovery and DRaaS. But for many, DRaaS is not the overarching focus. And, although technically categorized as a stand-alone offering, in reality DRaaS would be better characterized as an add-on service for colocation services or infrastructure as a service (IaaS), a "tip of the spear" service with which the intended sales motion is to upsell to fully managed services, or an add-on capability following the sale of an appliance or software. In reality, this is a good thing. No one approach is better than the others as they can all meet different customer needs in various ways with different degrees of effectiveness.

There is no "one size fits all" answer. Consequently, this Magic Quadrant, alongside the associated "Critical Capabilities for Disaster Recovery as a Service," is intended to help IT leaders select which vendors to engage based on matching organizational requirements and overarching strategy.

Key Differences in This Year's Magic Quadrant

There has been some significant movement among some providers in terms of placement on this year's Magic Quadrant. Collectively this movement is a result of three evolving vectors.

Market

Change is the only constant in life — and the DRaaS market is no exception. What were once differentiating attributes only a couple years ago are now considered the bare essentials. Meanwhile, customer expectations have increased with respect to the ability to perform more granular recovery of workloads and address a variety of triggers that cause disasters, including ransomware.

Provider Progress and Advancements

Some vendors have continued to build upon prior momentum, and some have pivoted in terms of strategic direction regarding DRaaS in their portfolios. Some did not put forth the level of investment or make the progress expected in the past 12 months; while yet others have made investments or acquisitions but need time to further mature and capitalize on them.

Magic Quadrant Scoring Emphasis

As the market continues to evolve, so has the scoring criteria for the Magic Quadrant over the past three years. This year is no different. The specific attributes and weightings associated with the scoring can be found at the end of this document. However, eight areas in particular are highlighted immediately below to reflect some of the largest shifts in emphasis:

- 1. Value for the Money:** One major driver for customer adoption of DRaaS is cost reduction or cost avoidance. In fact, 61% of Magic Quadrant customer references surveyed stated as such. At the same time, prices vary significantly from provider to provider. Analysis performed in October 2016 of Gartner's pre-existing fact base of vendor proposals showed a wide range of DRaaS prices – spanning \$19 to \$281 per server per month. This makes it challenging for customers to know to what degree market-relevant value is being offered by a prospective vendor, and whether the customer's cost targets will truly be achieved. Consequently, sales execution/pricing as an Ability to Execute criterion increased in weighing from medium in 2016 to high in 2017. In addition, as part of the Magic Quadrant process, DRaaS providers were asked to submit sales collateral, pricing, and terms and conditions for different scenarios. Interestingly, the range of prices submitted by vendors during the Magic Quadrant evaluation process closely mirrored the aforementioned analysis. For example, in one scenario, after including upfront fees (if applicable) and monthly recurring fees, vendor proposal effective costs ranged from \$17 to \$383 per server per month. In another scenario, vendor proposal effective costs ranged from \$43 to \$505 per server per month. This, of course, was put into context with service attributes the provider delivers, such as self-service versus fully managed, service levels provided, recovery time objective (RTO)/recovery point objective (RPO) provided, costs for testing or disaster recovery declaration, and contract terms. Value for the money, with respect to near-term importance for potential DRaaS customers, is obvious; again, there is an expectation of lower costs. But value for the money is potentially much more significant over the longer term for customers, especially if the vendor's business model is not aligned. For example, DRaaS vendors with higher prices than peers will unlikely be able to sustain those prices. Without a strong business model, market pressures will squeeze margins and hamper the DRaaS provider's ability to reinvest in areas that will improve features and customer service. Meanwhile, DRaaS providers on the lower end of the value-for-the-money cost spectrum have smaller discrete margins to reinvest. Thus, a strong volume-centric business model is required in order to create the funding needed for continuous improvement for paying customers. Taking all this into consideration, more than in years past, value for money was highly emphasized in DRaaS Magic Quadrant scoring.
- 2. Minimum Viable Product:** A couple of years ago, a DRaaS provider's capabilities in areas such as seamless heterogeneous workload support and orchestrated recovery, as well as failback, could have been positioned as differentiating attributes. But the DRaaS market is reaching a level of maturity where such capabilities are essentials. Consequently, poorer scores resulted if vendor solutions lacked in areas like those mentioned above.

- 3. Degree of Vendor Focus:** DRaaS, for some providers, might be positioned more as an add-on service for colocation or IaaS; for others it is a "tip of the spear" service with which the intent is to upsell to data center outsourcing services. For yet others, it is an optional add-on capability following the sale of an appliance or software. Meanwhile, some vendors may use DRaaS as one tool in their toolbox toward enabling larger, complex engagements that involve platform transformation, data center consolidation, or cloud migrations. Collectively, all these core business traits and capabilities are of tremendous value to many customers. That said, a vendor's Ability to Execute and Completeness of Vision in areas tangential to DRaaS had little influence on this year's Magic Quadrant scoring – especially if essentials related to value for money and minimum viable product were lacking. For Gartner clients with requirements where disaster recovery is only one aspect, other Magic Quadrants or Market Guides, such as "Magic Quadrant for Public Cloud Infrastructure Managed Service Providers, Worldwide" and "Market Guide for Managed Hybrid Cloud Hosting, North America" will be more appropriate.
- 4. Offering (Product) Strategy:** As various DRaaS offering attributes continue to become commoditized across the market, the offering (product) strategy criterion has become more important. Consequently, this Completeness of Vision category weighting, as a whole, was increased from medium to high.
- 5. Compliance and Global Reach:** Due to increased geopolitical concerns and the fact that many clients look to DRaaS to meet an urgent regulatory need, greater emphasis was placed on DRaaS providers' global reach and breadth and depth with respect to experience helping their customers meet industry-relevant needs. To the former point, geographic strategy as an overall DRaaS Magic Quadrant criterion was increased from a weighting of medium in 2016 to high in 2017. To the latter point, 34% of the collective customer base in this year's DRaaS Magic Quadrant is in either the financial services or the healthcare industry. Consequently, in addition to having an increased weight in scoring, DRaaS providers' industry-related credentials (e.g., PCI for finance and HIPAA for healthcare) were also listed within the associated "Critical Capabilities for Disaster Recovery as a Service" document as well.
- 6. Security:** Unlike several years ago when natural disasters ruled most discussions around disaster recovery, now these conversations more often revolve around security-related triggers, such as a ransomware attack. Consequently, providers who have differentiated elements in their offerings or offering roadmaps in this area benefited in their scoring.
- 7. Portal Functionality for Self-Managed Versus Fully Managed:** Portal functionality is important for all providers as it pertains to their ability to enable orchestrated recovery of workloads underpinning business processes. And it remains highly important for those who specialize in x86 workloads and especially so for those offerings that are self-service in nature. However, portal functionality is less critical at this juncture with respect to fully managed service offerings where more complex heterogeneous environments are involved. 2017 Magic Quadrant scoring reflects this nuance.
- 8. End Users Versus Managed Providers:** The DRaaS Magic Quadrant is intended to help end customers determine which DRaaS providers may be a good match. However, many DRaaS providers have become increasingly sales-channel-partner-centric (i.e., working through managed service providers [MSPs] versus engaging directly with end customers). But, since every sales channel partner will differ in some shape or form, determining the

likelihood that a customer will have a positive experience can be problematic. At the same time, service attributes in the DRaaS market have improved drastically over the past few years – from onboarding to pricing to portal usability – and DRaaS offerings themselves have fluctuated significantly. In fact, 83% of the vendors in the DRaaS Magic Quadrant have announced acquisitions or new DRaaS service offerings in the past couple of years. Consequently, interviews of customers who bought services from the DRaaS provider many years ago might not be completely representative of what a new customer would experience. Customers that were onboarded a while ago had different expectations, and providers had fewer capabilities. With that in mind, several elements were invoked in this year's Magic Quadrant in order to dissect these nuances. For starters, Magic Quadrant vendor participants were required to provide a minimum number of references that were onboarded within the past 12 months, as well as a minimum number that were end users versus MSPs. In addition, other areas, such as roles and responsibilities between the provider and MSP from the viewpoint of the end user, were scrutinized – as were other areas such as vendors' approaches toward ensuring consistent pricing, service levels and contract terms through the MSP.

Context for Details Provided in Vendor Descriptions

Typical customer details within each of the vendor write-ups are not intended to suggest the vendor cannot or does not support other organizational sizes or implementations within DRaaS itself or via other managed services. Typical customer figures are specific to DRaaS and based on averages across the vendor's entire DRaaS customer base as of the beginning of the year. These figures are merely averages and may not be indicative of the median customer size or reflect trends related to recently onboarded customers.

Similarly, primary workloads supported are not intended to suggest the vendor's capabilities are in all cases limited to only those listed. Rather, it is intended to highlight the types of workloads typically supported through the provider's DRaaS offerings. In addition, the vendor may provide related options for other workloads such as colocation, traditional DR, managed hosting, or support through other third parties.

Magic Quadrant

Figure 1. Magic Quadrant for Disaster Recovery as a Service



Source: Gartner (June 2017)

Vendor Strengths and Cautions

Acronis

Acronis, founded in 2003, has provided cloud-related recovery services for more than seven years and data recovery products for more than 14 years. Headquartered in Singapore, it operates 14 data centers globally and is primarily a partner-driven business with a focus on manufacturing, automotive, public sector and education-related markets. In addition to disaster recovery, much focus is related to unified data protection for backup of personal devices, archiving, e-discovery, file sync and share, and notary. For example, the Acronis Active Protection offering provides automated behavioral heuristic detection and recovery that can enable disaster avoidance related to ransomware.

Primary Support Approaches: Fully managed via partner, but some are supported via self-service after initial onboarding by partner.

Primary Workloads Supported: Physical and virtual x86, with backup capabilities for non-x86.

Regional Recovery Presence: Global presence with DRaaS customers primarily in the U.S. and the U.K.

Typical Customer: Small and midsize businesses with fewer than 25 servers, although it has at least one customer with more than 200 servers under management.

Recommended Use: Physical and virtual x86 server implementations where a broad-based solution is desired, including backup for desktops and mobile devices and notary-related functions.

STRENGTHS

Acronis was in the top three in terms of the number of partial disaster recoveries performed.

It issued 70 patents in the past year, with a continued focus on unified data protection.

Clients praised the implementation teams and their willingness to be creative in solution approach. And, even when not ultimately selected, customer surveys revealed Acronis was frequently considered.

CAUTIONS

Areas such as onboarding assistance, whether by a partner or as a separate Acronis professional service engagement, will involve additional fees. And disaster recovery declaration fees are significant and only obvious in the contractual details.

Automated and orchestrated failback is not yet available.

Existing clients reported issues related to a lack of features and ongoing customer support after initial onboarding.

Axcient

Founded in 2006, Axcient provides a single solution that includes data protection, disaster recovery, archiving, and test/dev – eliminating the need for multiple solutions, data centers, or silos of infrastructure by extending the value of copy data management to the cloud. Axcient makes two self-service platform options available. Axcient Business Recovery Cloud is its original; and Axcient Fusion, launched in 2016, is positioned as the next-generation platform built to run on public cloud and able to meet the needs of midsize organizations with hundreds of servers. Both offer one-hour and eight-hour RTO options and can be managed from a single user.

Primary Support Approaches: Fully managed via partner, or self-service after initial onboarding by Axcient.

Primary Workloads Supported: Physical and virtual x86, with backup capabilities for non-x86.

Regional Recovery Presence: Primarily in the U.S., and with customers in Canada, the U.K. and Western Europe as well.

Typical Customer: Small and midsize businesses with fewer than 25 servers, although it has a minimum of one customer with at least 200 servers and at least one MSP with at least 1,000 servers under management.

Recommended Use: Axcient Business Recovery Cloud for smaller physical and virtual x86 environments and Axcient Fusion for larger VMware environments.

STRENGTHS

Axcient service's copy data management approach allows for multiple uses of the replicated data – including backup, data recovery, data archival, and testing and development. The latter two are optional add-on services.

Current Fusion prices are competitive and involve no hidden fees with regard to the number of restore points, retention (up to seven years), testing (four times per year), disaster declaration, public cloud network charges.

Axcient has its own intellectual property, including DirectRestore for granular application recovery (such as Microsoft Exchange), which came to Axcient via an acquisition in 2014. Axcient also licenses the DirectRestore technology to other companies in the data protection market.

CAUTIONS

The Fusion service offering does not provide recovery for physical machines or perform automated failback. And pricing for Business Recovery Cloud is above average as compared to similar peers.

Revenue growth from 2016 to 2017 was in the bottom five among the vendors in this year's Magic Quadrant.

Given its roots with Business Recovery Cloud and small businesses, Axcient's number of average servers per customer is on the lower end of providers in the DRaaS Magic Quadrant. Prospective Axcient customers with larger deployment needs should request similar-sized Fusion references.

Bluelock

Bluelock was founded in 2006 initially as a managed hosting and IaaS provider. In the past three years, the company has primarily invested in and focused on its DRaaS offerings for U.S.-based midsize and large companies. Bluelock is not large in terms of scale. However, where it stands out is its very hands-on and consultative, business-focused approach evident both in its SaaS application and Bluelock Portfolio. Dubbed the "Bluelock Experience," the organization helps clients gain constituent alignment, recovery assurance and colocation recovery integration.

Primary Support Approaches: Fully managed via Bluelock, or assisted after initial onboarding by Bluelock.

Primary Workloads Supported: Virtual x86 with integrated colocation capabilities for non-x86 workloads.

Regional Recovery Presence: Two locations in the U.S. – Indianapolis, Indiana, and Las Vegas, Nevada.

Typical Customer: Companies with fewer than 50 servers, although it has a minimum of one customer with at least 500 servers under management.

Recommended Use: U.S. companies that desire a business-related, high-touch approach toward DRaaS and have heterogeneous workloads that require not only colocation but integration into a recovery plan as well.

STRENGTHS

Bluelock has experienced and capable professional services related to onboarding, training and run book development processes — all demonstrated through its Recovery Assurance program.

Bluelock helps IT teams set realistic expectations via a very consultative approach, which focuses on discussing not only recovery tiers but also "recovery waves." The point of this approach is to separate technical capabilities related to replication from human realities during an actual disaster event.

Bluelock has positive customer survey responses, including from those who have recently onboarded, especially related to the degree of partnership and trust in the solution. And SLAs capture several aspects of the services — from availability to response times to recovery times.

CAUTIONS

Bluelock has only two recovery centers. Although located away from major NOAA disaster zones by design, both are in the U.S.

Bluelock is in the bottom third with respect to the number of x86 servers supported, of which a sizeable portion comes from anchor clients.

To date, nearly 50% of its current clients are small and lower-midtier companies. But Bluelock's intended target markets are now primarily midsize and large organizations. Given Bluelock's high-touch approach, this could be a constraint during the sales process for smaller organizations in the future.

C&W Business

C&W Business operates in 42 countries in the Caribbean, Latin American and North American regions. Its customer support centers offer both Spanish and English interactions. Technical support services are also provided in both languages. The company operates as a subsidiary of Liberty Global, being part of the 2016 purchase of Cable & Wireless Communications. The foundation for much of C&W's differentiation with respect to DRaaS is rooted in its network connectivity capabilities and in its investment in the Geminare platform to integrate recovery of x86 workloads and IBM-based platforms.

Primary Support Approaches: Fully managed, although self-service is an option.

Primary Workloads Supported: Physical and virtual x86, Unix (AIX, Solaris) and IBM System i.

Regional Recovery Presence: Seven regional data centers — Miami, the Cayman Islands, Panama (two), Curacao, and Bogota, Colombia (two).

Typical Customer: Midmarket customers with fewer than 25 servers; it has a minimum of one customer with at least 100 servers under management.

Recommended Use: When regional needs, especially network connectivity and hybrid recovery, are priorities for low- to medium-complexity environments. And when there is a desire for complete data center outsourcing.

STRENGTHS

Customers purchase access to a virtual data center, which can be utilized across any of their physical locations and changed as a result of business needs.

C&W is one of the few vendors that has integrated recovery support for IBM-based platforms. And via its Oracle Standard Edition DRaaS, it is able to save customers money on Oracle license fees.

Customer references were very satisfied with C&W Business' ability to support low- to medium-complexity architectures, repeatedly citing an easy implementation process.

CAUTIONS

Self-service prices for simple deployments are significantly higher than the average among peers in this Magic Quadrant. Taking over production support adds only approximately 20% in costs to customers; hence, the recommendation for clients with a desire for complete data center outsourcing.

C&W is limited with respect to compliance certifications, geographic reach and enablement of the use of public hyperscale cloud providers.

Customer references revealed issues with initial service configuration sizing. Validate any sizing assumptions that you may have prior to finalizing contracts.

Carbonite

Carbonite was founded in 2005 and is headquartered in the U.S. out of Boston, Massachusetts. Carbonite's Cloud Disaster Recovery (formerly EVault) DRaaS offering supports recovery of virtual machines (VMs), bare-metal system images and production data inside a managed cloud. Recovery testing and recovery operations are largely provider-managed. And, although not part of the scoring for this Magic Quadrant due to timing, the recent acquisition of Double-Take Software (now rebranded as Carbonite DoubleTake) can be a boon to the company and customers in terms of capabilities over time.

Primary Support Approaches: Fully managed via Carbonite.

Primary Workloads Supported: Physical and virtual x86 as well as Unix and IBM System i.

Regional Recovery Presence: Three recovery centers in the U.S.

Typical Customer: Small and midsize businesses that have the need to recover non-x86 environments.

Recommended Use: U.S. companies that desire a full-service offering or have IBM System i workloads.

STRENGTHS

Carbonite is one of the few vendors in this Magic Quadrant that has recovery of non-x86 workloads formally integrated as part of its actual DRaaS offering.

Guaranteed service tiers, with corresponding RTO- and RPO-based service-level targets, are available from Carbonite.

Customer surveys suggested that Carbonite was at least considered by many during the selection process, even if not always ultimately chosen – this is meaningful with respect to brand awareness and overall viability.

CAUTIONS

Carbonite had poor customer survey scores for DRaaS, especially for more complex implementations. Issues ranged from meeting SLAs with high-data-change-rate implementations to responsiveness of the portal.

For simple implementations, prices for Carbonite are 37% higher than average among peers with fully managed offerings in this Magic Quadrant.

The portfolio as a whole is in a state of transition. For example, although now targeting the midmarket for DRaaS, 75% of Carbonite's current customer base is small or lower-tier midmarket companies. And in terms of the number of x86 machines per customer, Carbonite ranks in the bottom third among the vendors in this Magic Quadrant.

CloudHPT

CloudHPT is the cloud solutions division of BIOS Middle East Group. It is headquartered in the United Arab Emirates and principally serves the Gulf Cooperation Council (GCC) region. It was founded in 2002, and its business is focused on cloud services for IaaS, DRaaS and backup as a service (BaaS).

Primary Support Approaches: Fully managed.

Primary Workloads Supported: Physical and virtual x86.

Regional Recovery Presence: Data center locations in Dubai and Abu Dhabi, with sales into the GCC region.

Typical Customer: Small and midsize businesses with fewer than 50 servers, although it has a minimum of one customer with at least 200 servers under management.

Recommended Use: When low latency of services is the priority for clients in the Middle East region.

STRENGTHS

CloudHPT supports multiple tiers of services using distinct technologies for each tier to deliver costs in line with the needed capabilities.

The vendor has a strong focus on disaster avoidance through proactive security information and event management (SIEM) capabilities.

Although CloudHPT currently reaps the benefits of a specific regional advantage, the roadmap is forward-thinking and includes integration capabilities with respect to hyperscale public cloud providers.

CAUTIONS

Currently, CloudHPT services have only two recovery locations and are only available in the Middle East region.

The pricing of services is higher than would be seen in other regions. This sentiment was echoed via several customer interviews as well.

Although CloudHPT was near the top with respect to growth of DRaaS customers and revenue in 2016, some of this is attributed to the fact that it is in the bottom 25% with respect to the number of customers and number of virtual x86 machines currently supported.

Daisy

Daisy Group is one of the largest business communications and IT service providers in the U.K. It was founded in 2001, and offers network services, nine data centers, and 18 worksite recovery locations consisting of over 30 office locations in the U.K.

Primary Support Approaches: Fully managed, light support.

Primary Workloads Supported: Physical and virtual x86, minor support for Unix and IBM System i.

Regional Recovery Presence: The U.K.

Typical Customer: Small and midsize businesses with fewer than 100 servers under management.

Recommended Use: When located within the U.K., and when additional capabilities such as office space recovery services are needed.

STRENGTHS

Daisy is focused on the needs of small and midsize businesses in the U.K. for overall IT and network services, with add-on capabilities for DRaaS.

Protection of on-premises, colocation and cloud-based data can be provided via a variety of technologies, which can result in very competitive pricing. In fact, with respect to costs for simple scenarios, Daisy was in the lowest third among Magic Quadrant peers offering fully managed services.

Daisy allows support of heterogeneous recovery environments with subscription hardware access to complement its cloud-based recovery services.

CAUTIONS

Costs can vary greatly. Customer interviews reported undersized initial configurations that caused them to have overage charges on a regular basis. Ratios in relation to Daisy's DRaaS revenue against the number of DRaaS customers and the number of x86 servers supported are far higher than most vendors with respect to average costs.

Contract terms stipulate that Daisy can substitute virtual servers in place of physical servers at its discretion, and testing is limited to the number of days subscribed to in advance.

Daisy offers a wide variety of services centered on data services for mobile devices, endpoints, managed hosting and custom customer deployments – less focus is on DRaaS specifically.

Databarracks

Databarracks was founded in the U.K. in 2002 as a full-service MSP, but, in 2016, it retired some non-continuity-related services completely and now focuses on only three areas: disaster recovery as a service, backup, and resilient cloud-based infrastructure design. Its business is entirely focused on U.K. clients and it has a concentration of clients related to legal, government and nonprofit organizations.

Primary Support Approaches: Fully managed.

Primary Workloads Supported: Physical and virtual x86.

Regional Recovery Presence: The U.K.

Typical Customer: Midsize businesses with fewer than 50 servers under management.

Recommended Use: U.K.-based companies where reliable service delivery is the priority for low- to medium-complexity environments.

STRENGTHS

Databarracks' singular focus is on its home market and building out workable disaster recovery solutions for its clients. And in 2016, it launched its Cyber-DRaaS solution, which includes security value-adds such as detection, reporting and recursive scanning.

Databarracks is incubating and developing additional tools and processes that it uses internally as well as commercially, such as BackupChecks, which is integrated with Asigra and Kazoup and allows file analytics and archiving for SaaS data sources.

Repeated statements from Databarracks' customers indicate that the services provided were exceptional.

CAUTIONS

Hyperscale public cloud support is currently limited to AWS and is related to managed services – not yet specific to disaster recovery.

Lack of focus on integration with client tools for IT service management (ITSM), cloud management platform (CMP) or DevOps may be an issue for clients that are using those IT operations processes.

Databarracks does not support Unix or applications such as SAP or Oracle at the application level.

Datto

Datto, headquartered in Connecticut in the U.S., is a provider of backup and disaster recovery appliances, SaaS data protection, and managed networking products. It was founded in 2007 and has more than 5,000 managed service provider partners that market its products worldwide.

Primary Support Approaches: Fully managed via partners.

Primary Workloads Supported: Physical and virtual x86.

Regional Recovery Presence: Nine data center locations worldwide in the U.S., Canada, Iceland, the U.K., Germany, Singapore and Australia.

Typical Customer: Small businesses with fewer than 25 servers, although it has a minimum of one customer with at least 100 servers and at least one MSP with at least 750 servers under management.

Recommended Use: When utilizing an MSP for day-to-day IT operations in low-complexity environments.

STRENGTHS

Datto is cost-effective and has the most DRaaS customers and the most x86 servers supported of any provider in this Magic Quadrant.

Datto's appliances perform backup and local virtualization for DR, and replication to its cloud-based DR sites. It utilizes its Inverse Chain Technology to reduce the amount of data that needs to be transmitted per backup point, and uses its SpeedSync to ensure it is transmitted, received, and verified efficiently.

Partners are the front line for support and operations for Datto's products, which leads to very personalized services for clients. Satisfaction scores from its providers were much improved in the past year.

CAUTIONS

Datto is 100% channel-driven. In order to allow flexibility for providers to bundle it into other services, Datto does not mandate pricing control mechanisms. Consequently, prospective Datto customers may want to vet more than one MSP as each will vary in approach and cost.

Datto service levels to MSPs are limited to support response time based on incident severity. There are no guarantees with respect to uptime or recovery times. End users should be aware of this when discussing SLAs with the chosen MSP.

Datto does not restrict the number of vCPU and vRAM in the cloud; however, there is a limit of 8 vCPU and 16 GB vRAM per machine on the portal. Going beyond this threshold requires customization via Datto support.

Evolve IP

Evolve IP was founded in 2006 and is headquartered in Wayne, Pennsylvania. It leads with its OneCloud solution, which allows organizations to migrate multiple cloud computing and cloud communications services onto a single, unified platform. This includes virtual data centers/servers, disaster recovery, virtual desktops, IP phone systems/unified communications, and contact centers. Following a majority investment by Great Hill Partners in June 2016, EvolveIP made its fourth acquisition in the past three years – Xtium, a healthcare-focused competitor in the Wayne area.

Primary Support Approaches: Self-service; and fully managed was added in 2016.

Primary Workloads Supported: Physical and virtual x86.

Regional Recovery Presence: Five recovery centers in the U.S. that serve 99% of its customers, and a location in the U.K. and one in Australia.

Typical Customer: U.S.-based companies with fewer than 25 servers, although it has a minimum of one customer with at least 200 servers under management.

Recommended Use: U.S. companies with noncomplex server footprints, but whose complexity comes in the form of wanting a single provider to manage other platforms such as virtual desktops and VoIP systems as well.

STRENGTHS

Service offerings are well-articulated with respect to different DRaaS types and backup options.

Evolve IP has a holistic approach to services beyond DRaaS, such as unified communications, as well as an industry focus.

Existing clients scored customer satisfaction high and pointed to Evolve IP's organizational focus and additional managed service capabilities as some reasons for its selection.

CAUTIONS

Although its recovery centers are geographically dispersed, to date most customers are in the U.S., concentrated in the mid-Atlantic region.

Planned offering enhancements specific to DRaaS are less pronounced on Evolve IP's roadmap than most other vendors in this Magic Quadrant. And the longer-term impact on the company and its customers as a result of the Great Hill Partners investment is yet to be determined.

Prices were slightly above average for simple virtual environments among peers with fully managed offerings in this Magic Quadrant, and were on the higher side for more complex scenarios that did not involve discounting associated with consumption of multiple services.

Expedient

Expedient is a cloud and data center infrastructure-as-a-service provider headquartered in the Pittsburgh, Pennsylvania. It was founded in 2001, and it provides DRaaS both to clients hosted within its data centers as well as separately as a service for customers hosting their production workloads on-premises or in other locations.

Primary Support Approaches: Fully managed.

Primary Workloads Supported: Physical and virtual x86.

Regional Recovery Presence: Midwest, mid-Atlantic and Northeastern portions of the U.S.

Typical Customer: Small and midsize businesses with fewer than 25 servers, although it has at least one customer with more than 200 servers under management.

Recommended Use: Organizations that prefer Expedient's regional location along with dedicated, nonoversubscribed resources that can be utilized for more than just DR.

STRENGTHS

Expedient does not oversubscribe capacity and has incorporated network microsegmentation within its offering by way of VMware NSX.

Expedient offers direct uplink to hyperscale providers from its facilities to ease integration of hybrid IT scenarios for customers that also use public cloud hosting. And it partners with Nutanix to provide hyperconverged integrated system (HCIS) as a service for both primary and DR uses.

Expedient's sales proposals for the requested scenarios were attentively detailed yet easily consumable. Customer interviews frequently echoed similar sentiments with regard to Expedient's onboarding approach and ongoing support.

CAUTIONS

Expedient has a limited choice of technologies for DR replication. This, in turn, limits its abilities for physical workload recovery and limits the degree to which pricing can be rightsized for customers who require less aggressive RTOs or RPOs.

Expedient's service offering development focuses more on providing customers with private enterprise virtualization that includes production (e.g., private cloud either on the customer premises or hosted by Expedient with add-on DRaaS options), more so than DRaaS specifically.

Expedient's Push Button DR 2.0 service offering, which is based on Zerto technology, was only just released on 30 August 2016. Until that time, only a storage-based replication option was provided.

IBM

IBM Resiliency Services offers DRaaS as well as a full breadth of resiliency and high-availability-related professional and managed services, including consulting, design, migration, implementation, business continuity management and cloud backup. IBM Resiliency Services also includes site, facilities and data center operation services, which collectively provide data center best-practice strategies; design, build, relocation and consolidation; and data center management for resiliency from the ground up. In 2016, IBM purchased Sanovi to complement its IT resiliency orchestration capabilities. Additionally, IBM's Watson remains a potential differentiator when it comes to disaster avoidance.

Primary Support Approaches: Fully managed.

Primary Workloads Supported: Physical and virtual x86, Unix (AIX, Solaris, HP-UX), IBM System i, IBM System z, storage area network (SAN) replication and database appliances.

Regional Recovery Presence: Sixteen countries spanning North America, Latin America, Europe, the Middle East, Africa, Japan, Asia/Pacific and China.

Typical Customer: Businesses with fewer than 25 servers, although it has a significant number of customers with much larger volumes under management – including some with at least 1,000 servers.

Recommended Use: When recovery of heterogeneous and diverse platforms are priorities, with medium to high complexity in the environment.

STRENGTHS

IBM is one of three vendors in this Magic Quadrant with significant non-x86 workload and mainframe recovery experience. Moreover, IBM has supported more than 1,000 recoveries since 1989.

IBM has a long-standing history in disaster recovery, which it continues to improve on with new capabilities and acquisitions. The recent Sanovi acquisition is the latest example.

Flexibility in terms of both length of contracts (four months or longer) and size (two to 15,000 VMs) are viewed as positives. And, in comparison to others in the Magic Quadrant who proposed fully managed services for the slightly more complex scenarios, IBM's prices were slightly below the median.

CAUTIONS

For virtualized workloads, IBM uses many of the same technologies that are available from other providers. At the same time, in comparison to others in the Magic Quadrant who proposed fully managed services for much simpler scenarios, IBM's prices were significantly higher than the median.

IBM leverages Watson internally to help optimize shared asset management across locations. And IBM offers Watson for its Data Recovery Services offering and The Weather Co. for its Resiliency Communications as a Service offering. However, specific to DRaaS, utilization of Watson or other strategic assets is currently limited and more vision-oriented.

IBM's customer reference satisfaction scores were low, and areas for improvement cited included expectation gaps between those set by sales versus the ability of technical teams to meet them.

iland

Founded in 1994 initially as a website development company and headquartered in Houston, Texas, and London, iland created its colocation and managed hosting offerings around 2000. It first delivered its VMware-based IaaS offering in 2008, with coinciding cloud-based recovery offerings. Today, the portfolio is global in nature and primarily consists of iland Secure Cloud (IaaS), iland Secure Disaster Recovery (DRaaS) and iland Secure Cloud Backup.

Primary Support Approaches: Self-service or full service via a partner.

Primary Workloads Supported: Physical and virtual x86.

Regional Recovery Presence: Five recovery centers in the U.S.; two in the U.K.; and one in Singapore.

Typical Customer: Medium-complexity environments with fewer than 100 VMware-based servers, although it has a minimum of one customer with at least 500 servers under management.

Recommended Use: U.S. or U.K. companies with compliance and/or network complexities that desire VMware-based IaaS as well as DRaaS in a self-service manner.

STRENGTHS

iland has depth with respect to compliance credentials in both the U.S. and the U.K. And iland provides customers direct access to Level 2 technicians – every iland engineer and support team member is certified for VMware, Cisco, Zerto, Veeam and/or Carbonite DoubleTake.

iland has a sustainable approach with respect to product strategy and feature enhancements for customers. It has expertise on staff with respect to both DevOps and compliance. The result is material that is both concise and easily consumable, but not constrained due to automation capabilities.

iland had solid customer survey satisfaction scores, and existing customers applauded support, the portal and the underpinning Zerto-based solution.

CAUTIONS

iland does not currently provide integrated self-service options for customers with larger volumes the benefit of mixing different recovery options (e.g., Zerto and Veeam) in order to right-size business requirements and costs.

Customers with needs that are limited to only DRaaS may find iland's prices to be higher relative to other self-service providers and on-par with some fully-managed providers.

iland is not appropriate for organizations with immediate plans for migration to hyperscale public cloud providers such as AWS, Azure or Google because iland's focus is on its own IaaS.

Infrascale

Founded in 2011, Infrascale is primarily focused on DRaaS and leads with its mission statement, "eradicate downtime and data loss." Using its own technology, it allows for recovery of heterogeneous workloads via self-service or a combination of partner and Infrascale support. Infrascale brings a cloud-agnostic approach that allows for recovery at one of its 16 recovery centers; hyperscale providers such as IBM SoftLayer/Bluemix, Azure, AWS and GCP; or one of its partners – spanning, in total, 23 countries.

Primary Support Approaches: Self-service or fully managed by Infrascale or a partner.

Primary Workloads Supported: Physical and virtual x86.

Regional Recovery Presence: Infracore has 16 recovery centers with data centers in the U.S., Canada, the U.K., Germany, Australia and South Africa. Including hyperscale cloud providers and partners, a total of 23 countries are covered.

Typical Customer: Small and midmarket companies with fewer than 50 servers, although it has a minimum of one customer with at least 200 servers under management.

Recommended Use: Companies with a hybrid infrastructure, but that do not include mainframe or that have requirements outside of backup for Unix or IBM System i servers.

STRENGTHS

Pricing is straightforward by way of a storage-based monthly fee, and the service includes unlimited recovery testing and disaster declarations, with no additional charges beyond the initial setup fee. It is marketed as "hot or warm recovery at the price of tape backup."

Infracore's primary focus is DRaaS, which is evident based on documentation, competitive positioning and roadmap. In January 2017, a formal partnership between Infracore and GCP was announced.

Current customers touted the ease of implementation, customer support and the excellent price point.

CAUTIONS

Like most vendors in this Magic Quadrant, automated failback between dissimilar hypervisors or hardware is not yet available.

In-motion improvements will need to be executed upon to maximize channel partner vision — including MSP desires for increased reporting and alert management capabilities and branding options.

Infracore customer survey responses included several cautions. Many were technical in nature, and the vendor claims these were addressed through improvements in May 2016. However, most recommended additional upfront due-diligence with respect to sizing of appliances and the level of training that will be provided regarding best practices for backup scheduling.

Microsoft

Microsoft provides infrastructure, platform and software services as well as DRaaS through its Azure Cloud Services. Azure Site Recovery (ASR) is part of the Operations Management Suite. Microsoft built ASR by integrating the InMage technology it acquired in 2014 and now provides DR to Azure for VMware, Hyper-V and physical workloads.

Primary Support Approaches: Self-service — direct, assisted or fully managed via a partner.

Primary Workloads Supported: Physical and virtual x86.

Regional Recovery Presence: Global with 26 locations including the U.S., Canada, the U.K. and Germany.

Typical Customer: Small and midsize businesses with fewer than 25 servers, although it has a minimum of one customer with at least 200 servers under management.

Recommended Use: When low costs and unlimited, pay-as-you-go testing are priorities for low-complexity, x86-only environments.

STRENGTHS

Pricing for all testing and data storage is based on actual utilization.

The availability of ASR in every major Azure site allows clients to protect data globally.

Customer satisfaction surveys showed ASR was among the highest for this Magic Quadrant with respect to how often it was considered during the selection process.

CAUTIONS

There are few, if any, customers of ASR who are not also Office 365 customers.

Planned failover for VMware-based VMs is not supported currently. And physical x86 workloads, following a DR event, can only be failed back as a virtual workload.

Due to the complexity of setup and operations for ASR, many customers utilize partners for initial onboarding or long-term operations. Microsoft is in the midst of major overhauls for documentation and support to increase their usefulness and capabilities.

NTT Communications

NTT Communications (hereafter "NTT Com"), an NTT Group company, is a separate operation from NTT Data and Dimension Data. Its primary focus is on network and data center operations, and it offers services for cloud, data center, network, security and governance, and professional and managed services. DRaaS is one of its managed service offerings.

Primary Support Approaches: Fully managed and self-service after initial onboarding.

Primary Workloads Supported: Physical and virtual x86.

Regional Recovery Presence: The U.S., Asia/Pacific, Japan, the U.K. and Australia.

Typical Customer: Businesses with fewer than 25 servers, although it has a minimum of one customer with at least 200 servers under management.

Recommended Use: When already utilizing or strongly interested in other NTT Com services.

STRENGTHS

NTT Com has a strong global networking presence with private networks in 196 countries and offerings to complement DRaaS managed services.

The Geminare-based Cloud Management Platform (CMP) can integrate with multiple replication and backup technologies (e.g., Arcserve and Veeam) as well as Microsoft Azure.

NTT Com has a large presence in the Asia/Pacific region.

CAUTIONS

NTT Com is in the midst of a shift where most of its focus is on multicloud management (i.e., other public clouds such as Microsoft Azure) and consultative transformation – little focus is on DRaaS specifically.

Of NTT Com's current customers, 85% are fully managed and most via its IaaS. Yet, due to the aforementioned shift, customers may receive self-service proposals with unneeded complexity – such as splitting up some workloads for recovery on NTT Com's infrastructure and others on

Microsoft Azure.

NTT had low marks in customer survey scoring, with issues that included onboarding timeliness and slow cloud service response times. With respect to the contractual details submitted with scenario proposals, service levels for DRaaS were limited to uptime and measured only during the time of actual disaster recovery failover or failback.

Peak 10

Peak 10 is based in the Southeastern United States, with 16 data centers located across 10 cities in seven states in the Southeast and Midwest. In addition to DRaaS, it offers data center and network services, managed services, and cloud-based infrastructure and object storage services.

Primary Support Approaches: Fully managed.

Primary Workloads Supported: Physical and virtual x86, with partner-managed colocation capabilities for non-x86.

Regional Recovery Presence: Primarily within the Southeastern U.S., but with customers in 23 states.

Typical Customer: Small and midsize businesses with fewer than 25 servers, although it has a minimum of one customer with at least 100 servers under management.

Recommended Use: When fully managed services with a low RPO are priorities for low- to medium-complexity fully virtualized or physical x86 environments.

STRENGTHS

Peak 10 has three tiers of RTO, all of which feature Zerto-based continuous data protection with a low RPO. These three tiers can be combined into a tailored solution in order to rightsize requirements and costs.

Peak 10 has high levels of operational automation, which improve consistency in its service delivery.

Customer references spoke very highly of the technical talent at Peak 10.

CAUTIONS

Peak 10's research and development investments are significantly lower than many other providers within this Magic Quadrant. Consequently, its track record for adoption of new capabilities is slower than many of its competitors.

Peak 10 only supports virtualized workloads for DRaaS, and doesn't have a true hybrid recovery environment configuration.

The vendor's pricing model has high fixed costs and prepaid instances, which inflates the costs for small configurations and could be wasteful if unused.

Quorum

Headquartered in San Jose, California, Quorum is centered on its patented onQ technology. Introduced commercially in 2010, onQ was originally developed for U.S. Naval combat systems. Through the years, it has evolved in terms of abilities for backup, deduplication, replication, one-click instant recovery, automated DR testing, sandbox testing, migration and archiving. DRaaS services are provided via its three recovery centers in the U.S. and the U.K.

Primary Support Approaches: Self-service after initial onboarding and the first 30 days of support.

Primary Workloads Supported: Physical and virtual x86; SAN, iSCSI, Network File System (NFS), and network-attached storage (NAS).

Regional Recovery Presence: Three recovery centers and data centers in the U.S. and the U.K.

Typical Customer: Small and midmarket companies with fewer than 25 servers, although it has a minimum of one customer with at least 100 servers under management.

Recommended Use: Small businesses or lower-tier midmarket businesses with fewer than 50 servers; where self-service is preferred; and where there is a willingness to pay a premium for a local higher-performing device.

STRENGTHS

onQ offers a range of failback options from bare-metal restore to incremental failback — including to similar or different hardware; from physical to virtual; virtual to virtual; or virtual to physical hardware.

The appliance itself can perform automated DR testing after snapshots to ensure recoverability. And the provider is thoughtful with respect to recovery options, especially in the use of the appliances when customer requirements involve several small sites.

Existing customers tout both the performance of the devices as well as onQ's customer service.

CAUTIONS

Much of Quorum's focus is on the onQ appliances themselves and associated use cases. Less focus is on the DRaaS or onQ cloud portions of the portfolio. Meanwhile, the ability to leverage hyperscale public cloud providers as a replication target is currently limited.

The lack of API to allow integration for value-added partners limits future colocation capabilities or additional geographic expansion capabilities.

Costs, particularly for implementations of fewer than fifty virtualized servers, are significantly higher than most others offering self-service (60% to 80% higher than the median proposal price submitted by vendors in this Magic Quadrant). And, due to the breakout of the device purchase from the DRaaS offering, much of the costs are front-loaded.

Recovery Point

Recovery Point began in business under the auspices of its now wholly owned subsidiary, First Federal in 1982. Its client base consists of commercial, civilian and secure federal agencies, and state and local governments. Its primary focus is helping customers deal with complex heterogeneous environments that include physical systems and servers, such as IBM z Systems, IBM System i, IBM System p and Oracle Solaris.

Primary Support Approaches: Most are fully managed or assisted; 20% of customers are self-service after initial onboarding.

Primary Workloads Supported: Physical and virtual x86; Unix (AIX, HP-UX, Solaris); IBM System i, and mainframes.

Regional Recovery Presence: Three data centers in the U.S.

Typical Customer: Organizations based in the U.S. with complex heterogeneous environments and fewer than 100 servers, although it has a minimum of one customer with at least 200 servers under management.

Recommended Use: U.S.-based organizations that desire self-service for straightforward virtualized x86 environments, or that desire fully managed services for more complex deployments.

STRENGTHS

Recovery Point is one of three vendors in this Magic Quadrant that have significant experience providing recovery for non-x86 workloads and mainframes. And its services are competitively priced, as illustrated by the fact that scenario quotes were 40% less than the median of providers in this Magic Quadrant that offer fully managed services.

Recovery Point's private network infrastructure functions as a national network hub with the ability to cross connect inexpensively to more than 700 WAN providers. Additionally, it has direct cross connects, at 1G to 200G, to backbones of AWS Direct Connect and Azure ExpressRoute.

Recovery Point is very strong with respect to compliance and security, and rather than carve out separate enclaves, it provides enhanced Federal Information Security Management Act (FISMA)-level protection to all customers. Meanwhile, existing customers touted employee expertise and degree of flexibility and collaboration.

CAUTIONS

Service availability is currently limited to the U.S.

The portal is a landing page for access to native tools versus being completely integrated; however, Gartner believes this is less relevant in the immediate term for more complex environments where multiple replication tools are required – particularly when recovery is fully managed by the provider.

Recovery Point does not have its own consulting arm for performing business impact analysis (BIA) like similar providers in this Magic Quadrant, but it does have capabilities via a third-party partnership.

StorageCraft

StorageCraft is a storage and services company headquartered in Draper, Utah. It was founded in 2003, and its business is entirely focused on data protection and restoration services that are offered through value-added and channel partners. It also offers cloud services that can be utilized for disaster recovery by its managed partners.

Primary Support Approaches: Fully managed via partners or self-service after initial onboarding via partners.

Primary Workloads Supported: Physical and virtual x86.

Regional Recovery Presence: The U.S., Canada, Ireland, Germany and Australia.

Typical Customer: Small businesses with fewer than 25 servers, although it has a minimum of one MSP with at least 100 servers under management.

Recommended Use: When utilizing managed services from small value-added partners for low-complexity environments.

STRENGTHS

StorageCraft has localized language support for German, French, Italian, Spanish, Portuguese and Japanese.

StorageCraft requires high levels of training in order for partners to achieve Platinum partner certification. This helps ensure consistent customer satisfaction.

Partners are very satisfied with the ease of implementation and simplicity of the product.

CAUTIONS

StorageCraft's cloud-based disaster recovery capabilities are only offered with its highest-level bundle of cloud-based services, which accounts for a small subset of its overall customer base.

StorageCraft's support for application and non-x86 platform recovery is significantly lower compared to other providers in this Magic Quadrant.

Although StorageCraft will take direct end-user calls, partners are chiefly responsible for any and all testing and executing during actual disaster recovery events.

Sungard Availability Services

Although it offers a variety of services, Sungard AS has offered disaster recovery services for more than 30 years and considers it a core competency. In addition to DRaaS, it offers subscription hardware-based recovery, workplace recovery, and, uniquely in this space, it also has its own business continuity management planning software. In addition to its own recovery locations, Sungard AS now offers Recover2Cloud using AWS.

Primary Support Approaches: Fully managed.

Primary Workloads Supported: Physical and virtual x86, Unix (AIX, Solaris, HP-UX) IBM System i and IBM System z.

Regional Recovery Presence: The U.S., Canada, the U.K., Western Europe and Northern Europe.

Typical Customer: Businesses with fewer than 25 servers, although it has a significant number of customers with much larger volumes under management — including some with at least 1,000 servers.

Recommended Use: When hybrid cloud and heterogeneous workload capabilities are priorities for medium- to high-complexity environments.

STRENGTHS

Sungard AS is one of three vendors in this Magic Quadrant with significant experience providing recovery for non-x86 workloads and mainframes, with additional support for application workloads through its Managed Recovery Program.

The vendor has a well-established track record of successfully providing recovery services, even during large regional disasters. In fact, it has supported well over 3,000 recoveries since 1990.

Sungard AS uses automation not only to provision cloud resources, but also to manage the availability and usage of physical resources to support hybrid recovery scenarios.

CAUTIONS

Innovations for Sungard AS's services are not consistently presented to customers during the contract period and potentially even during renewal discussions.

Customer reference scores and sentiment have declined over the past year, with Sungard AS's contractual processes for changes and high costs at contract renewal highlighted. Along those same lines, prices offered by Sungard AS for the scenarios averaged significantly higher than the median price of other fully managed providers in this Magic Quadrant.

The RTO SLA for Recover2Cloud services is variable based on the dedicated or shared option for equipment, number of assets protected, and the individual technology utilized, resulting in guaranteed RTO times that could be between two to 16 hours.

TierPoint

TierPoint was formed in 2010 when Cequel Data Centers started purchasing smaller regional companies (Colo4 and Perimeter Technology in 2011, TierPoint in 2012, Windstream Hosted Solutions in 2015 and Cosentry in 2016), and, as a result now has over 40 facilities dispersed across 20 cities in the U.S. It provides a full set of disaster recovery services, including workspace recovery in some of its locations, in addition to offering cloud and colocation solutions to enable hybrid IT and hybrid resiliency.

Primary Support Approaches: Fully managed and self-service.

Primary Workloads Supported: Physical and virtual x86, Unix (AIX, Solaris, HP-UX), as well as SAN and database replication.

Regional Recovery Presence: The U.S. — locations spread from the Northwest to the East Coast.

Typical Customer: Small to midsize clients with fewer than 25 servers under management.

Recommended Use: When flexibility in technology choices and multiple tiers of services are priorities for medium-complexity environments.

STRENGTHS

TierPoint utilizes a wide mix of technologies to deliver on customer requirements. And TierPoint was in the top three of all providers in this Magic Quadrant with respect to the number of Unix and IBM systems under DRaaS management.

The vendor is willing to take on complex solutions that require boutique technologies. In 2016, it introduced an offering where it designs and orchestrates multicloud environments between the TierPoint cloud and the Azure infrastructure.

TierPoint's distributed denial of service (DDoS) attack prevention involves the use of two dedicated scrubbing centers with failover to Radware's cloud for additional capacity as needed.

CAUTIONS

TierPoint utilizes commercially available solutions and has not developed its own technologies.

TierPoint's willingness to support a wide variety of technologies comes at the expense of its ability to industrialize these processes, which may result in higher prices relative to other self-service providers.

Most of the vendor's customer references were unresponsive to survey requests. But some feedback included poor documentation and inaccurate ordering information that resulted in delays during projects. With limited references, it is difficult to know if these are isolated incidents or systemic issues.

Unitrends

Headquartered out of Burlington, Massachusetts, Unitrends has created multiple channel-driven recovery-related products and offerings. At the core are Unitrends' Recovery Series appliances, which include replication and orchestration, and automated recovery capabilities that are branded ReliableDR. Unitrends' Forever Cloud and Recovery Assurance are add-on services for DRaaS customers. The latter provides a one-hour recovery guarantee. In addition, its Unitrends Boomerang product allows customers to replicate workloads to hyperscale public cloud providers in a self-service manner.

Primary Support Approaches: Fully managed, self-managed after light onboarding, or fully managed via a partner.

Primary Workloads Supported: Specific to DRaaS, x86 workloads are provided with recovery and backup of other workloads.

Regional Recovery Presence: Seven recovery centers and data centers, with three in the U.S., and one each in the U.K., Germany, Canada and Australia.

Typical Customer: Small and midsize companies with fewer than 25 servers, although it has a minimum of one customer with at least 200 servers under management.

Recommended Use: Organizations with a small number of x86 virtualized servers or Windows-based physical servers, and that have some physical Linux servers and non-x86 servers where backups will suffice.

STRENGTHS

Unitrends' services are competitively priced and include automated, monthly full validation tests along with Recovery Time Actual (RTA) compliance reports.

Unitrends has a strong roadmap to build upon its Recovery Assurance mantra with respect to both proactive security features and configuration management sprawl, knowing that customer landscapes are always changing.

In 2016, internal cultural changes were implemented, including a "grok" engine to optimize and improve real-time market responsiveness. And free tools, such as the RTA Calculator, can be downloaded to help estimate recovery times for VMware-based workloads prior to purchasing.

CAUTIONS

Self-service products such as Unitrends' Boomerang offering can be appropriate and cost less over the long term for organizations with parallel hyperscale public cloud initiatives. However, Unitrends' Boomerang offering is not, by Gartner definition, DRaaS because the customer is responsible for the hyperscale public cloud costs incurred for recovery.

Unitrends offers a one-hour RTO guarantee with its Premium DRaaS option; however, prospective customers should request details on how it is measured in lieu of contractual declaration provisions, and ensure remedies are understood in the event the guaranteed RTO was to ever be missed.

Customer survey responders cited opportunities for improvement related to initial presales proof of concept (POC) testing and sizing requirements, first-level customer support and the newer GUI. Unitrends made changes to address these items in the latter half of 2016; however, end users are encouraged to validate via recently onboarded references and POCs.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

CloudHPT

Daisy

Expedient

Quorum

StorageCraft

Dropped

Verizon — Regarding the Degree of Vendor Focus section in the Magic Quadrant Scoring Emphasis section, Verizon has DRaaS capabilities but better serves customers with other requirements that include DRaaS versus those that have a desire for a DRaaS-only offering.

VMware — VMware's vCloud Air business unit had been a focused offering of cloud services for DRaaS, data center extension and data center replacement. On 8 May 2017, VMware's vCloud Air business and associated operational services (including DRaaS) were acquired by OVH. Because VMware is no longer a significant player in the DRaaS market, it has been dropped from the Magic Quadrant.

Inclusion and Exclusion Criteria

1. The vendor must offer one or more services consistent with the Gartner definition of DRaaS.
2. The vendor must have publicly offered its DRaaS service(s) for at least three years, as of 1 January 2017.
3. The vendor must be a significant player in the market via visible market presence and/or technology innovation, or have uniquely differentiated service offerings, as reflected in Gartner client and news media inquiries.

Notable Vendors

CloudEndure provides low RPO and RTO capabilities for physical and virtual x86 workloads via continuous replication, orchestration and automated machine conversion technologies. Through the console, customers can perform the initial sync to a cloud target of choice (e.g., AWS, Azure, Google or on-premises), perform disruptive tests, and trigger both failover and failback. Because it is software, versus DRaaS, it is not a candidate for this Magic Quadrant.

Webair is a solid choice for prospective companies who need not only x86 recovery capabilities, but IBM System i as well. Although it has historically focused on the Long Island, New York, and New York City metro areas, it also has recovery locations in Los Angeles, Montreal and Amsterdam. Commercially, it provides excellent value for the money, has experience with many different replication approaches, and has several healthcare-related customers with signed business associate agreements (BAAs).

Druva created its DRaaS offering only a little more than a year ago and is becoming an increasingly viable option for AWS from more of a SaaS, self-service perspective. The offering will soon allow protection for physical workloads, enable multiple uses of the data such as analytics, and provide for automated failback.

Evaluation Criteria

Ability to Execute

Ability to Execute considers the provider's ability to provide a DRaaS offering that meets customer feature/function requirements, as well as the provider's ability to operate the tool with a high level of service guarantee and customer support.

Product/Service

This criterion refers to core goods and services that compete in and/or serve the defined market. This includes current product and service capabilities, quality, feature sets, skills, etc. This can be offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria. Important aspects include:

- Breadth and depth of industrialized DRaaS service offerings toward meeting different needs with respect to workload types for Mode 1 customers.

- Breadth and depth of industrialized DRaaS service offerings toward meeting different RPO, RTO, and retention needs for Mode 1 customers.

- Breadth and depth of industrialized DRaaS service components that help mitigate against different triggers for disaster recovery.

- Degree to which the vendor enables Mode 2 initiatives.

- Investment in automation and skill sets.

- Ability to meet customer compliance needs.

Overall Viability (Business Unit, Financial, Strategy, Organization): Financials

Viability includes an assessment of the organization's overall financial health as well as the financial and practical success of the business unit. It views the likelihood of the organization to continue to offer and invest in the product, as well as the product's position in the current portfolio. Important aspects include:

Overall financial health of the company.

Indicators of business success in this particular market, such as revenue, number of customers, and amount of infrastructure under management.

Level of investment in this market.

Sales Execution/Pricing

This criterion examines the organization's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support and the overall effectiveness of the sales channel. Important aspects include:

Proposal quality.

Clarity as to what is included in the base services, what are optional add-ons, and what are custom-made capabilities.

Value for the money.

Contract transparency.

Commercial flexibility.

Sales team quality.

Approach for ensuring consistency among channel partners.

Market Responsiveness and Track Record

This criterion refers to the organization's ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve, and market dynamics change. This criterion also considers the vendor's history of responsiveness to changing market demands. Important aspects include:

Track record for identifying changes in market dynamics.

Track record of rapidly delivering new services in response to changes in targeted markets.

Approach toward ensuring competitive value — benefits and service costs.

Marketing Execution

Marketing execution describes the clarity, quality, creativity and efficacy of programs designed to deliver the organization's message in order to influence the market, promote the brand, increase awareness of products and establish a positive identification in the minds of customers. This "mind share" can be driven by a combination of publicity, promotional, thought leadership, social media, referrals and sales activities. Important aspects include:

Brand awareness.

Prospective customers' understanding of the vendor's value proposition in the targeted market.

Quality of marketing campaigns and other efforts such as social media participation.

Customer Experience

This criterion refers to products and services and/or programs that enable customers to achieve anticipated results with the products evaluated. Specifically, this includes the quality of supplier/buyer interactions, technical support, or account support. This may also include

ancillary tools, customer support programs, availability of user groups, service-level agreements and others. Important aspects include:

Disaster declaration process.

Disaster recovery testing approach.

Service-level agreement effectiveness.

Contract quality.

Service experience with regard to customer expectations.

Service quality assurance put in place for customers who primarily engage through a partner/managed service provider.

Operations

The operations criterion is the ability of the organization to meet goals and commitments. Factors include the quality of the organizational structure, skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently. Important aspects include:

Onboarding effectiveness.

Maintaining adequate staffing and personnel expertise.

Documented internal processes and procedures.

Track record for providing recovery for actual disaster events.

External support documentation for customers and/or channel partners to facilitate areas where they may have support requirements.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product or Service	High
Overall Viability	High
Sales Execution/Pricing	High
Market Responsiveness/Record	Medium
Marketing Execution	Low
Customer Experience	High
Operations	High

Source: Gartner (June 2017)

Completeness of Vision

Market Understanding

This criterion evaluates the vendor's ability to understand customer needs and translate them into products and services. Vendors that show a clear vision of their market listen, understand customer demands, and can shape or enhance market changes with their added vision.

Important aspects include:

- Clear understanding of today's market and where the vendor will and will not compete.

- Understanding of primary selection criteria for targeted customer segments within the overall DRaaS market and how the vendor meets those needs.

- Self-awareness in terms of both strengths and weaknesses.

- In the case where many service offerings are made available under DRaaS, crisp translation as to which is best for which situations.

- Future vision of the market and how the vendor will compete.

Marketing Strategy

This criterion assesses a vendor's clear, differentiated messaging consistently communicated internally, externalized through social media, advertising, customer programs, and positioning statements. Important aspects include:

- Clear, cogent, differentiated market positioning for customer segments that are targeted.

- When more than one DRaaS offering is offered, clear articulation as to when each is recommended.

- Market strategy for reaching targeted buyers.

Sales Strategy

This criterion refers to a sound strategy for selling that uses the appropriate networks including direct and indirect sales, marketing, service, and communication, as well as partners that extend the scope and depth of market reach, expertise, technologies, services and their customer base.

Important aspects include:

- Sales strategy for reaching each target customer segment.

- Partner and channel strategy.

Offering (Product) Strategy

This criterion covers an approach to product development and delivery that emphasizes market differentiation, functionality, methodology and features as they map to current and future requirements. Important aspects include:

- Service roadmap.

- How the vendor will meet needs for reducing total cost of ownership for clients in context of other options – other DRaaS providers, cloud and do-it-yourself alternatives.

- Strategy for meeting needs of customers who have a mix of on-premises and cloud-based architectures and/or buy SaaS services such as CRM.

- Approaches used to identify and prioritize backlog for new services and enhancements.

Business Model

This criterion refers to the design, logic and execution of the organization's business proposition to achieve continued success. Important aspects include:

- Evidence of a sound business plan.

- Adaptability and scalability.

- Market disruption capabilities.

- Level of Investment.

- Intellectual property.

- Key technical capabilities.

- Key nontechnical capabilities.

Vertical/Industry Strategy

This criterion covers the strategy to direct resources (sales, product, and development), skills and products to meet the specific needs of individual market segments, including verticals. Important aspects include:

- Regulated workloads and verticals, such as healthcare, government and PCI-compliant e-commerce.

- Differentiated experience or coverage for specific industries.

Innovation

This criterion assesses direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes. Important aspects include:

- Extent to which improved resiliency will be provided to customers.

- Mode 2 enablement.

- Strategy related to ITSM, CMP and DevOps tools.

- Automation.

- Personnel training and certification.

- Unique partnerships and mergers/acquisitions.

Geographic Strategy

This criterion covers the vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries, as appropriate for that geography and market. Important aspects include:

- Sales reach.

- Service reach.

- Ability to meet country-specific customer requirements in a way that is differentiated.

Marketing strategies and positions that are clearly aligned to the different geographies being targeted.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	High
Marketing Strategy	Low
Sales Strategy	Low
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	High

Source: Gartner (June 2017)

Quadrant Descriptions

Leaders

Leaders have large, mature DRaaS practices. These players have significant industry experience, global capabilities, a focus on DRaaS as a stand-alone offering, and industry-leading vision with respect to meeting the needs of its intended target customer segments.

Challengers

Challengers have substantial experience and focus on DRaaS, but have not yet contributed enough thought-leading differentiation to be considered a Leader.

Visionaries

Visionary providers tend to be less experienced or have smaller volumes of customers and/or number of servers protected under its DRaaS offerings than Leaders. However, they have the potential to disrupt the market as a whole or, on a smaller scale, the markets they target. The manner in which it is demonstrated varies. For some, it is intellectual property or regional differentiation, and for others it may be unique and differentiated ways to fulfill the needs of customers.

Niche Players

Niche Players tend to have smaller volumes of customers and/or number of servers protected under their DRaaS offerings supported, less focus on DRaaS itself as a stand-alone offering (as opposed to a sales entry point for a larger managed service deal), or have some areas that will require additional work with respect to DRaaS-specific offering capabilities, customer satisfaction, or differentiated vision.

Context

As more of the analog world becomes digitized, so downtime affects more of the world. However, infrastructure and operations (I&O) leaders must, in many cases, now shift their thinking away from internally facing DR strategies toward strategies for sustaining externally facing IT service continuity. This is especially true for I&O leaders who already are, or soon will be, tasked with supporting digital business and the Internet of Things (IoT), because the effectiveness of their strategies will be directly measured by the quality of the external customer experience and, ultimately, by the impact of that experience on both revenue and profitability.

Because digital business moments will typically be realized in very compressed time frames, the primary service-level metrics of traditional DR – RTOs and RPOs – no longer apply, as supporting web services must be continuously available. As a result, IT leaders will be increasingly challenged to enable a broader level of IT service continuity.

There are several reasons for this, including:

- Customers can, and will, switch providers in competitive markets, should a service go down and if switching is easy.

- Customers will also be vocal about a negative service experience through the use of social media, resulting in a damaged organizational reputation and brand image.

- Service arbitrage logic, at both the originating and intermediate processing points of a digital business moment, will contain increasingly sophisticated brokering logic that will transparently bypass fulfillment points whose availability is less than a predefined threshold.

The current state of DRaaS constitutes a significant inflection point between the more traditional DR management (which was typically very inwardly focused) and the world of digital business in which outwardly focused managed availability will become a critical success factor. The initial market shift – toward an increasingly managed availability focus and the support for hybrid data center operation – represents the important beginnings of this transition. Within the next five years, cloud-based DR will increasingly transition to managed data center resilience across the premises and the cloud, thereby resulting in recovery and availability either becoming attributes of the managed infrastructure or being directly managed by the applications themselves.

Market Overview

DRaaS vendors include a mix of service providers that also support communications services, subscription-based recovery services, colocation, managed hosting, IaaS and managed backup services. Initially, these providers' services were attractive primarily to small or midsize businesses (SMBs). This was because DRaaS freed up the time of the IT staff in these businesses and because they lacked a secondary recovery data center.

Today, Gartner estimates the size of the DRaaS market to be approximately \$2.01 billion, and we expect it to grow to \$3.7 billion through 2021. DRaaS growth will be strongest in areas where customers have limited public cloud options, in highly regulated industries, and where business processes consist of IT systems beyond virtualized x86 environments (e.g., bare metal and Unix).

Although the DRaaS market is growing and vendors offer a wide range of services, DRaaS customers still face several challenges:

The number of DRaaS options on the market causes confusion for potential customers as to which might be best for their situation. For example, in this Magic Quadrant there are vendors that have their own replication intellectual property and have grown from origins of selling software or appliance-based backup products; others have evolved from the traditional disaster recovery space; and others have added DRaaS capabilities to existing colocation IaaS options. For additional context, for providers without their own replication products, offerings are typically underpinned by commercial off-the-shelf replication products, such as Zerto, Veeam, Asigra, Carbonite DoubleTake, Commvault, StorageCraft and Acronis. Zerto alone has more than 300 cloud partners.

The level of complexity in the market is challenging. Each of the aforementioned choices have different restoration capabilities, service support models, prices and pricing approaches, service levels, networking capabilities, and regional capabilities. Even with any provider, different terms will likely be in play depending on configuration size and required computing platforms.

Use of a DRaaS provider does not mean that the internal IT is no longer responsible and accountable for successful recoveries. This means that DRaaS customers will still need to actively work with the provider in order to manage recovery assurance.

Regular exercising ensures recovery predictability and sustainability. This does not change with the implementation of DRaaS.

Heterogeneous recovery configurations beyond x86 often require a custom service agreement, especially for SLA definitions.

Declaration policy (that is, how many recovery exercises per year and how much time per exercise is allowed) varies by DRaaS provider.

COTS products used by many DRaaS providers are becoming more intuitive and including more options – creating more complicated build versus buy decisions.

Evidence

Evidence for this analysis was obtained from vendor questionnaire submittals, customer reference surveys, Gartner inquiries and publicly available data.

Evaluation Criteria Definitions

Ability to Execute

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

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

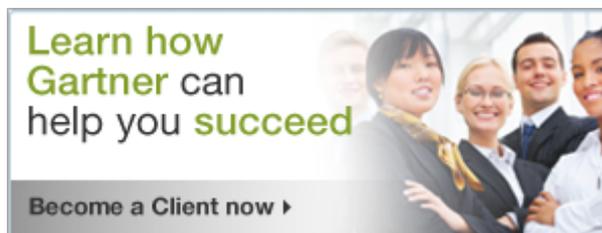
Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.



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