

# The Forrester Wave™: Disaster-Recovery-As-A-Service Providers, Q1 2014

by Rachel A. Dines, January 17, 2014

## KEY TAKEAWAYS

### **Business Technology Resiliency Is A High Priority, But Budgets Remain Flat**

In today's world of 24x7 business requirements, few companies can afford downtime, yet most are not allocating additional funds to prevent it. Traditional models for recovery are proving too expensive, too time-consuming, and unable to meet more aggressive recovery objectives.

### **DRaaS Is Growing As I&O Pros Look For Faster Recovery At Lower Cost**

The past few years have seen significant growth and adoption of DRaaS across all segments, as I&O professionals are looking for ways to improve their recovery objectives without increasing spend. In this time, traditional DR service providers, cloud service providers, telcos, and pure-play providers have brought new DRaaS solutions to market.

### **Breadth Of Services, Platform Support, And Proven Success Are Key Differentiators**

As traditional approaches to DR become outdated and less effective, DRaaS providers with tunable resiliency levels, broad platform support, and favorable contract terms and pricing will lead the pack. Since this market is new and immature, vendors that can demonstrate proven scale, success, and expertise are also very appealing to potential buyers.



## The Forrester Wave™: Disaster-Recovery-As-A-Service Providers, Q1 2014

A Dozen Cloud-Based Resiliency Players Battle It Out For Top Honors

by [Rachel A. Dines](#)

with [Stephanie Balaouras](#) and Heather Belanger

### WHY READ THIS REPORT

In Forrester's 17-criteria evaluation of disaster-recovery-as-a-service (DRaaS) vendors, we identified the 12 most significant service providers — Axcient, Barracuda Networks, CenturyLink Technology Solutions, EVault, HP, IBM, iland, nScaled, Persistent Systems, Quorum, SunGard, and Verizon Terremark — in the category and researched, analyzed, and scored them. This report details our findings about how well each vendor fulfills our criteria and where they stand in relation to each other to help infrastructure and operations (I&O) professionals select the right partner for their resiliency and recovery needs.

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### Notes & Resources

Forrester conducted service evaluations in October 2013 and interviewed 11 vendor and user companies: Barracuda, CenturyLink Technology Solutions, EVault, HP, IBM, iland, nScaled, Persistent Systems, Quorum, SunGard, and Verizon Terremark.

### Related Research Documents

[Master The Eight Disruptors That Will Transform Business Technology Resiliency In 2013](#)

February 15, 2013

[An Infrastructure & Operations Pro's Guide To Cloud-Based Disaster Recovery Services](#)

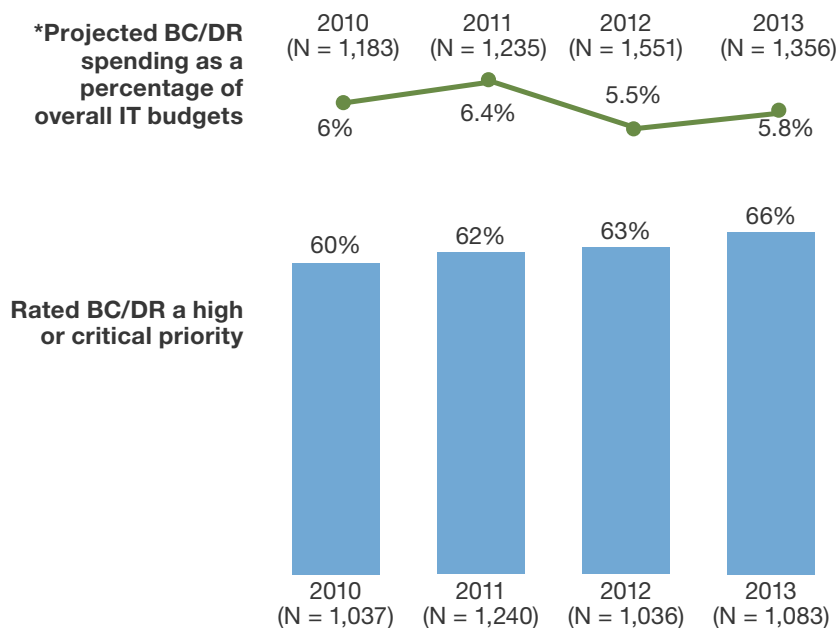
March 20, 2012



## RESILIENCY IS A TOP I&O PRIORITY, BUT CIOS WON'T INCREASE BUDGETS

It's a story we've all heard before: An I&O leader knows that her continuity plans are lacking and that her hopes of meeting recovery objectives are slim to none, yet she can't get the funding she needs to make improvements. While I&O leaders consistently list resiliency in their top five priorities for IT infrastructure, CIOs fail to significantly increase budgets (see Figure 1). It almost seems to be an impossible conundrum, as there are more critical systems than ever before, extremely aggressive business requirements, and complexity invading from all sides, yet there's no more money to spend. This is why cloud-based resiliency services — especially DRaaS — holds such great promise for weary resiliency managers.

**Figure 1** I&O Leaders Rate BC/DR As A High Priority, Yet Budgets Have Remained Flat Or Down



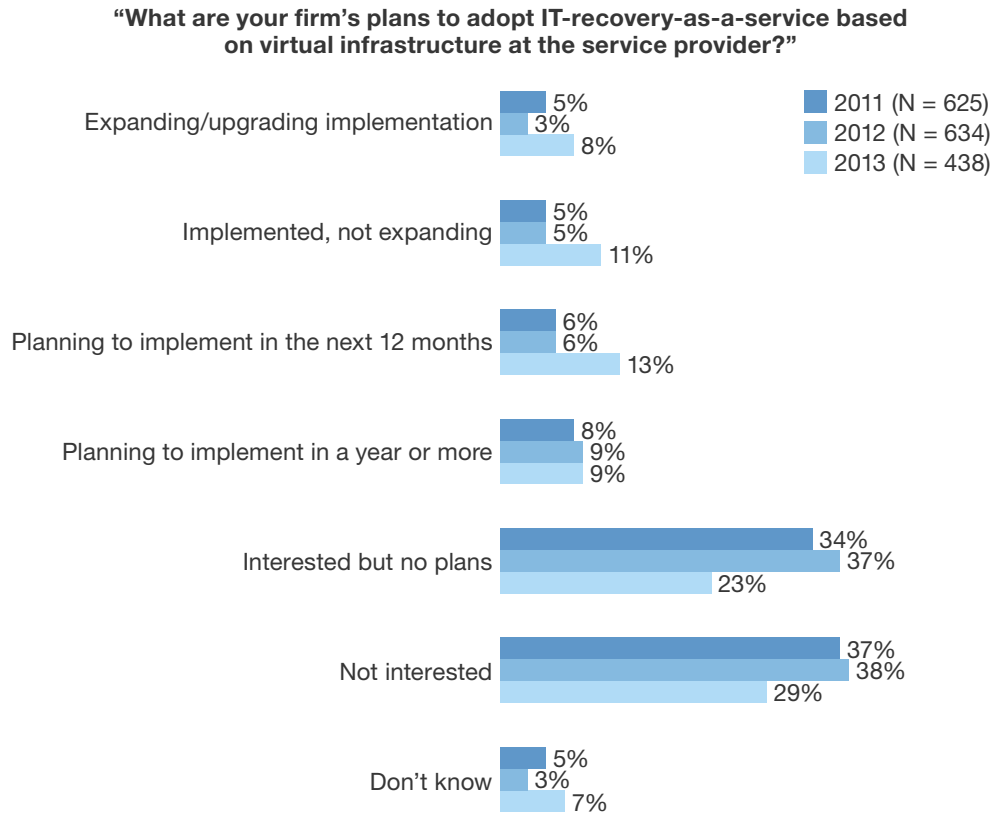
Base: IT budget decision makers from companies with 1000 or more employees

Source: \*Forsights Budgets And Priorities Tracker Survey, 2010 to 2013; and Forsights Hardware Survey, 2010 to 2013

## Enter Disaster Recovery-As-A-Service: The Great Savior For BT Resiliency

During the past several years, a slew of DRaaS offerings have hit the market with the promise of faster recovery in the cloud at the same or lower price points and more flexible contract terms compared with traditional recovery methods. While this may sound too good to be true, many who have taken the plunge report that these claims are not as far-fetched as they seem at first glance. During the past few years, enterprise DRaaS adoption has grown steadily to 19% today, with another 22% planning to adopt (see Figure 2). Early adopters of DRaaS cite the following benefits:

- **Better functionality for less cost.** DRaaS providers are able to keep costs down because at any given time, most clients are only consuming storage resources — booting virtual machines (VMs) only in the event of a disaster invocation or a test. Compute resources are generally oversubscribed; how much oversubscription there is will vary from vendor to vendor. Additionally, since pricing is pay-as-you-go, it involves little upfront capital investment.
- **Easier, more frequent, and less expensive testing.** DR testing is an area where organizations continue to struggle.<sup>1</sup> With DRaaS, testing is generally automated and nondisruptive, which means you can test more often. And unlike traditional DR providers, some DRaaS providers don't charge a fee for additional self-service tests. The provider can bundle DRaaS contracts with testing services and failover assistance if you require additional help.
- **More flexible short-term contracts with fast time-to-market.** One consistent complaint about traditional outsourced DR models is that they are too contractually restrictive — not only are they lengthy, but they are inflexible if you need to make changes to them midterm (and given the pace of both business and technology innovation, you will undoubtedly need to make changes). DRaaS providers, by contrast, tend to have extremely flexible contract models. Certain providers don't require any time-bound contracts; some have contracts up to a year at a time. This gives I&O professionals the ability to adapt to their needs as a result of their organization's changing technology environment and business needs.

**Figure 2** Disaster-Recovery-As-A-Service Adoption Starts To Take Off In The Enterprise

Base: server, storage, or data center decision-makers at North American and European enterprises

Source: Forrsights Hardware Survey, Q3 2013; Forrsights Hardware Survey, Q3 2012; Forrsights Hardware Survey, Q3 2011







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Source: Forrester Research, Inc.

### But They Can't Do It Alone: Partners And Enablers Play A Critical Role

You can't spend time analyzing the DRaaS market without also understanding the key role that partners and enablers of these solutions play. While a handful of providers, such as Axcient, Barracuda, and Quorum, deliver services based almost entirely on their own intellectual property, the majority of the providers in this space work with a variety of powerful software solutions that facilitate replication, copy management, automation, and failover (see Figure 3). You can deploy all of these tools on-premises and in private cloud implementations, and they can serve as the building blocks for an in-house cloud-based recovery solution.

**Figure 3** Software Partners And Enabling Technologies Play A Key Role In DRaaS Delivery

	Product	Description	Key DRaaS partners
	Copy Data Storage	Actifio is leading the crusade on copy data management — the concept having only a single copy of data that can be leveraged for many different use cases, like backup, disaster recovery, development, and testing. Several of the top DRaaS providers in this evaluation are using Actifio appliances as a means of providing both remote and local recovery for clients.	<ul style="list-style-type: none"> <li>• IBM</li> <li>• CenturyLink</li> <li>• SunGard</li> </ul>
	<ul style="list-style-type: none"> <li>• Scout</li> <li>• ScoutCloud</li> </ul>	InMage provides an appliance-based replication offering that uses a physical or virtual appliance to replicate data across any storage hardware to a remote location. The solution also offers continuous data protection for any point-in-time recovery. HP and SunGard both use InMage products as a means of replicating client data to the cloud.	<ul style="list-style-type: none"> <li>• HP</li> <li>• SunGard</li> </ul>
	Backup and Replication	Veeam specializes in resiliency and management tools for virtual environments. Providers use Veeam's technology for both backups and "cold recovery" (rapidly booting VMs out of a backup set) and for host-based replication that can replicate whole VMs from the client site to the provider cloud.	<ul style="list-style-type: none"> <li>• iland</li> <li>• Verizon Terremark</li> </ul>
	Double-Take	Vision Solutions acquired Double-Take, a host-based replication and continuity automation tool, in 2010. Today, Double-Take and other Vision Solutions replication tools enable DRaaS providers to replicate customer systems to the cloud, regardless of what the underlying storage is.	<ul style="list-style-type: none"> <li>• iland</li> <li>• CenturyLink</li> </ul>
	<ul style="list-style-type: none"> <li>• Site Recovery Manager</li> <li>• vSphere replication</li> </ul>	VMware's Site Recovery Manager is a key example of continuity automation software that allows organizations to simplify the failover and fallback of VMs across sites. Several service providers have deployed this solution in the cloud, allowing VMware customers to recover workloads in the cloud nearly instantly.	<ul style="list-style-type: none"> <li>• iland</li> <li>• SunGard</li> </ul>
	Virtual Replication	Zerto is one of the early providers of hypervisor replication, which allows customers to replicate individual virtual machines while keeping applications grouped for consistency. The solution is hardware agnostic and works with VMware and Hyper-V environments today. Verizon Terremark and iland both rely on Zerto's software to enable the bulk of their DRaaS customers.	<ul style="list-style-type: none"> <li>• iland</li> <li>• Verizon Terremark</li> </ul>

## DISASTER-RECOVERY-AS-A-SERVICE EVALUATION OVERVIEW

With so many new entrants to the DRaaS space, I&O professionals have struggled to cut through the hype and understand who leads and who lags in this market. To assess the state of the disaster-recovery-as-a-service market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top disaster-recovery-as-a-service providers.

### Evaluation Criteria Target Breadth Of Services, Platform Support, And Proven Success

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 17 criteria, which we grouped into three high-level buckets:

- **Current offering.** To assess product strength, we evaluated each offering against the completeness of core DRaaS offerings, recovery objective capabilities, platform and application support, data transfer technologies, change management, data resiliency and risk mitigation, and security.
- **Strategy.** To assess strategy, we considered how well the service provider could articulate and differentiate its value proposition and how well it positions planned enhancements to offer better recovery objectives at a lower cost. We also took into consideration providers' plans for expansion, their proven ability to scale, and their proven ability to execute successful recoveries. Finally, we took into consideration the service provider's approach to pricing, standard contract terms, changes, service levels, and support for testing.
- **Market presence.** To establish a service provider's market presence, we combined information about installed base, new customers, revenues, growth, geographic scope, and partnerships.

### Evaluated Vendors Offer DRaaS Solutions With Proven Scale And Experience

Forrester evaluated dozens of providers of DRaaS solutions for inclusion in this evaluation, but ultimately included 12 vendors in the assessment: Axcient, Barracuda, CenturyLink Technology Solutions, EVault, HP, IBM, iland, nScaled, Persistent Systems, Quorum, SunGard, and Verizon Terremark. Each of these vendors has:

- **A true cloud-based DR-as-a-service offering.** We evaluated providers that offer a standardized DR-as-a-service solution. Forrester defines this as services that enable customers to failover their on-premises infrastructure to a multitenant cloud environment that they purchase on a pay-per-use basis. The provider must run customers' production environments out of the cloud during disaster declarations or testing.<sup>2</sup>

- **Proven scale and experience.** We only considered providers for this evaluation that have at least 50 total current customers using their DRaaS solution. We also required that 10 of their current implementations have greater than 50 servers.
- **Focus on enterprise and midmarket deployments and interest from Forrester clients.** We evaluated providers with proven experience and strong track records across mid-sized to large companies and interest and adoption from the Forrester client base.

## ILAND AND SUNGARD LEAD IN A TIGHT RACE OF STRONG COMPETITORS

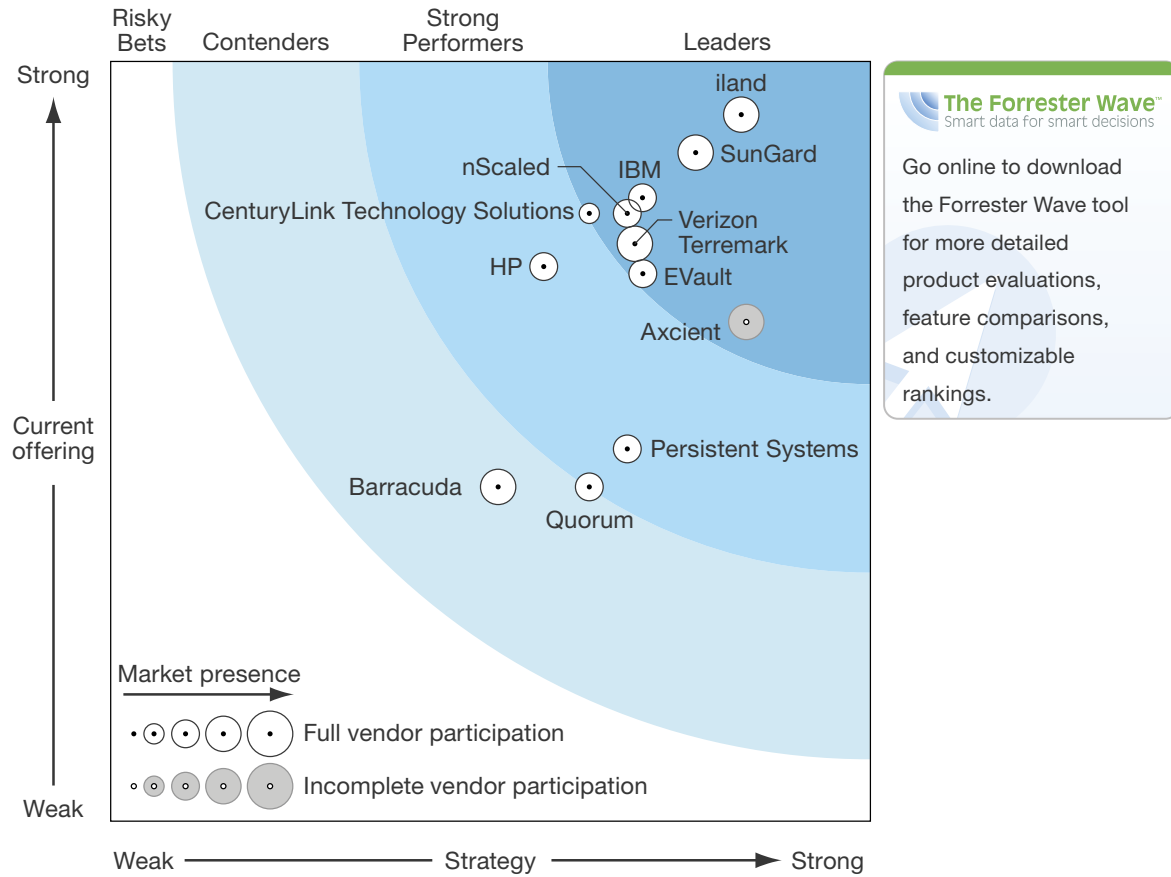
From traditional disaster recovery providers to cloud providers and telcos to pure-play DRaaS vendors, there are a wide variety of options when it comes to selecting a DRaaS partner. Because of diversity of players in the market, some participants are household names, while others are likely unfamiliar to I&O pros. The evaluation uncovered a market in which (see Figure 4):

- **Iland and SunGard lead the pack.** Two vendors stand apart in this evaluation: iland and SunGard both excel in their current offering and their strategies. Both offer very flexible solutions that cover the entire resiliency spectrum and allow users to pick from an array of standardized offerings to ensure that their needs are met.
- **IBM, nScaled, Verizon Terremark, and EVault are hot on their heels.** Just behind the top dogs, IBM, nScaled, Verizon Terremark, and EVault all demonstrated extremely strong solutions. High points for nScaled and Verizon Terremark are their security capabilities, while both EVault and IBM offer a wide range of recovery objectives at different price points.
- **Axcient, HP, and CenturyLink Technology Solutions offer competitive options.** Hot on the heels of the core Leader group is a cluster of worthy competitors: Axcient, HP, and CenturyLink Technology Solutions. Axcient did not actively participate in this research, but it was included because it excelled in its proven success and experience. By contrast, neither CenturyLink Technology Solutions nor HP have experienced client disaster declarations, but have tested extensively and show strong current offerings.
- **Persistent Systems, Quorum, and Barracuda offer more limited use cases.** Trailing are three vendors that offer capable services with somewhat more limited use cases. Instead of covering the entire spectrum of cloud resiliency options, each of these vendors is focused on providing one or two types of recoveries, usually with a more limited recovery objective range or fewer service offerings.

This evaluation of the disaster-recovery-as-a-service market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.



**Figure 4** Forrester Wave™: Disaster-Recovery-As-A-Service Providers, Q1 '14



Source: Forrester Research, Inc.

**Figure 4** Forrester Wave™: Disaster-Recovery-As-A-Service Providers, Q1 '14

	Forrester's Weighting	Barracuda	CenturyLink Technology Solutions	EVault	HP	IBM	iland	nScaled	Persistent Systems	Quorum	SunGard	Verizon Terremark
<b>CURRENT OFFERING</b>	50%	2.20	4.00	3.60	3.65	4.10	4.65	4.00	2.45	2.20	4.40	3.80
Core disaster-recovery-as-a-service offerings	20%	3.00	5.00	4.00	4.00	4.00	5.00	4.00	3.00	2.00	4.00	4.00
Recovery objective capabilities	20%	1.00	5.00	5.00	3.00	5.00	5.00	3.00	1.00	1.00	5.00	3.00
Platform and application support	15%	2.00	2.00	3.00	5.00	5.00	5.00	4.00	3.00	3.00	4.00	4.00
Data transfer technologies	15%	2.00	4.00	2.00	3.00	3.00	4.00	4.00	1.00	1.00	5.00	4.00
Change management	10%	3.00	3.00	3.00	3.00	5.00	3.00	5.00	5.00	5.00	3.00	3.00
Data resiliency and risk mitigation	5%	4.00	4.00	3.00	3.00	3.00	5.00	3.00	2.00	4.00	4.00	3.00
Security	15%	2.00	4.00	4.00	4.00	3.00	5.00	5.00	3.00	2.00	5.00	5.00
<b>STRATEGY</b>	50%	2.55	3.15	3.50	2.85	3.50	4.15	3.40	3.40	3.15	3.85	3.45
Value proposition and vision	25%	3.00	4.00	4.00	3.00	4.00	5.00	3.00	3.00	3.00	5.00	4.00
Planned service enhancements	20%	4.00	5.00	5.00	4.00	5.00	4.00	3.00	4.00	3.00	4.00	3.00
Supported disaster declaration	25%	1.00	1.00	3.00	1.00	3.00	3.00	4.00	5.00	3.00	3.00	2.00
Proven scale	15%	1.00	3.00	2.00	3.00	3.00	4.00	3.00	1.00	4.00	4.00	5.00
Pricing, service levels, and contract terms	15%	4.00	3.00	3.00	4.00	2.00	5.00	4.00	3.00	3.00	3.00	4.00
<b>MARKET PRESENCE</b>	0%	3.45	1.70	2.85	3.00	2.35	3.10	2.70	2.90	2.15	3.40	3.05
Installed base	35%	5.00	1.00	3.00	1.00	1.00	3.00	2.00	5.00	2.00	2.00	1.00
Revenue	35%	2.00	1.00	2.00	5.00	2.00	3.00	2.00	1.00	1.00	4.00	4.00
Growth	10%	2.00	2.00	5.00	3.00	3.00	2.00	5.00	5.00	5.00	5.00	5.00
Partnerships	10%	3.00	3.00	3.00	3.00	5.00	5.00	5.00	3.00	1.00	5.00	5.00
Geographic scope	10%	5.00	5.00	3.00	3.00	5.00	3.00	3.00	0.00	5.00	3.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

## VENDOR PROFILES

### Leaders

- **iland.** The dark horse champion of this evaluation, iland began its DRaaS practice in 2008, and since then, it's grown it into a mature and diverse offering with several hundred customers. One of the biggest strengths of iland's continuity cloud offering is its immense flexibility across recovery objectives, data transport technologies, supported platforms, and even the management and support. Yet somehow, it manages to keep its solution from becoming overly complex and overly customized. In fact, its pricing transparency, service levels, and contract terms received very high marks from customers. Today, iland offers its cloud services out of several locations in the US and one site in the UK; however, it is expanding quickly within Europe, the Middle East, and Asia (EMEA) and Asia Pacific (APAC).
- **SunGard.** One of the longtime giants in the resiliency world, it's no surprise to see SunGard's offering as a Leader in this evaluation. Recover2Cloud is a highly flexible and scalable offering backed by the company's decades of experience in the disaster recovery market. While its current client base is still relatively small, it's composed of very large deployments and continues to grow quickly. Beyond the current offering, SunGard's strategy for the future of DRaaS is extremely compelling and includes the use of test and development assets for DR, increased automation, and application-centric resiliency. SunGard offers Recover2Cloud out of a limited set of the company's overall data centers today, but the company claims that it can rapidly deploy the offering within 60 days into many of its data centers worldwide upon customer request.
- **IBM.** A historical Leader in the traditional DR services market, IBM continues the tradition with its DRaaS offering, SmartCloud Virtual Server Recovery.<sup>3</sup> Within the traditional recovery world, IBM shines in large, complex, and diverse enterprise environments, and the same holds true in the cloud-based recovery space. Case in point, IBM demonstrated one of the most inclusive support matrices for customer systems. One of the most interesting areas for IBM, however, is its strategy. The company is developing software to help organizations aggregate internal and external information to predict failures and outages before they occur. This could allow companies to be more proactive, executing recovery plans before they fail. SmartCloud Virtual Server Recovery has one of the widest geographic footprints of evaluated solutions, with sites in North America, APAC, EMEA, and Australia and New Zealand (ANZAK).
- **nScaled.** A pure-play provider focused solely on providing DRaaS, nScaled offers an appliance that allows organizations to either recover locally or in the nScaled cloud. In addition to broad platform support, the nScaled solution has a highly automated change management methodology. One of the greatest differentiators of nScaled's service, however, is its testing capability: It allows customers to activate up to three concurrent servers on demand at any time, for no additional cost. Because of this, nScaled customers are using their DR assets for testing and analytics today, something that most DRaaS providers only aspire to offer. Furthermore,

the standard service entitles customers to a full DR test every eight weeks, a frequency that is virtually unheard of in the traditional DR service provider industry. nScaled currently offers services out of two data centers in the US and one in the UK.

- **Verizon Terremark.** Verizon's Virtual Disaster Recovery solution was one of the first available DRaaS offerings, coming to market in 2007. Verizon's offering excels in its security capabilities — which are based on its leading managed security services — as well as in platform support and recovery methods.<sup>4</sup> It also boasts some of the largest scaling implementations, with its largest customer protecting thousands of VMs and almost a PB of data. Verizon brings a unique approach to its pricing model, in which it allows customers to choose the level of oversubscription and risk they are comfortable with for each of their instances. During failover, if there is extra capacity available, customers are allowed to burst into it, free of charge (it's also worth noting that Verizon does not charge occupancy or usage fees during declaration). Virtual Disaster Recovery is hosted out of two US data centers today and one in EMEA.
- **CenturyLink Technology Solutions.** CenturyLink acquired Savvis, the cloud and data center services company, in 2011. CenturyLink Technology Solutions offers cloud-based recovery to both its existing cloud customers in a cloud-to-cloud failover model and to customers with on-premises production who want to failover to a cloud environment. The latter offering is based largely on its partnership with DataGardens, a continuity automation software solution that is built to orchestrate larger enterprise DR environments. Strengths for CenturyLink Technology Solutions include its broad range of recovery options, offering many different tiers of recovery objectives. While it is a newer entrant to the market, CenturyLink Technology Solutions has a strong plan for future service enhancements, including new deployment models such as active-passive and active-active recovery. CenturyLink Technology Solutions offers DR-in-the-cloud services out of 28 sites worldwide.
- **EVault.** Known primarily as a leading provider of cloud-based backups, EVault, a wholly owned subsidiary of Seagate Technologies, expanded into the DRaaS space in 2008 with a cold cloud recovery (i.e., VMs booted from backups).<sup>5</sup> Since then, it has added other modes of recovery and today has several hundred DRaaS customers and a 99% retention rate. EVault offers one of the most progressive guarantees with its service: If it misses a recovery objective during a declaration or a test, the customer receives three months of service credits and can cancel the contract without a fee. It also offers high levels of transparency on its oversubscription rates — with the exception of hot recovery sites, services are oversubscribed on a four-to-one basis. EVault offers its DRaaS service out of US, Canada, and UK data centers and also works with partners in EMEA and Latin America.
- **Axcient.** Rounding out the Leaders' circle is Axcient, a pure-play cloud resiliency company that focuses on providing both local and cloud-based recovery and backups in a single appliance. Axcient has a strong vision and aggressive plans to expand its platform beyond the areas of

backup, archiving, and disaster recovery to include remote file access, sharing, intelligence and analytics, and more. Strengths for Axcient include a highly automated change management system, strong security protocols, flexible contract terms and pricing (it allows customers to run out of its cloud for 40 consecutive days at no additional cost), and proven record of success with more than 3,500 clients. Axcient offers its service out of data centers in the US and Canada.

### Strong Performers

- **HP.** Launched in 2012, HP's Enterprise Cloud Services Continuity solution builds on expertise from the Continuity Services division and the Enterprise Cloud Services group to deliver a competitive offering in DRaaS. Customers deploy the solution in a variety of modes, from on premises to cloud and from cloud-to-cloud, such as virtual private cloud and private cloud. Strengths for HP include a broad platform and application support, flexible contract terms and pricing, and security capabilities — including FFIEC compliance in at least one location. While HP's DRaaS customer base is very small — due to the fact that the service is relatively new — its customers tend to be larger enterprises. Today, HP offers Enterprise Cloud Services Continuity out of the US and the UK but will soon expand it to its 16 virtual private cloud sites worldwide.
- **Persistent Systems.** In 2012, Persistent Systems acquired the promising startup Doyenz for its DRaaS solution, rCloud. The solution offers a self-service platform based on virtually any existing backup infrastructure, which allows customers to failover on demand to the cloud at any time with an RTO of 15 minutes or less. A major strength of the platform is the ability for customers to use their cloud recovery instances for virtual labs or testing upgrades at any time with no additional charge. While the solution can protect both physical and virtual machines, it can protect only vSphere virtual environments today. rCloud is best suited for smaller and less complex environments compared with other providers in this Forrester Wave. Today, rCloud is offered out of a single data center in North America, although Persistent Systems has plans to expand into EMEA and APAC.
- **Quorum.** One of the first to market with the “DR in a box” concept, Quorum's DRaaS solution offers customers both local and remote backups and the ability to failover to a local appliance or to the cloud. While the company focuses on simplicity and automation in its platform, it doesn't sacrifice the ability to scale — its largest customer protects hundreds of systems in the cloud. Quorum's main differentiator is its approach to testing: Rather than schedule testing once or twice per year, Quorum's approach is to continuously test systems and monitor the success of the tests closely. Future plans for the platform include increased automation of network configurations and restarting VMs and increasing scale to cover the entire data center. Quorum hosts its solution out of multiple data centers in the US, Europe, and the Middle East and works with partners in other regions.

## Contenders

- **Barracuda Networks.** Barracuda's main focus in the resiliency space is providing cloud-based server backup and recovery; however, it recently brought to market a cloud recovery option for clients so that they can boot backups in the Barracuda cloud. This feature, called Cloud Liveboot, is bundled with its Instant Replacement Program, which has seen explosive growth — more than 60% of the backup install-base has purchased this feature, which translates to thousands of users. Barracuda also enables cloud recovery in its Copy product, where customers can restore securely to an online file server and automatically share data with customers and employees. While the offering lacks the robust feature set and scalability of the standalone solutions evaluated in this Forrester Wave, it is a cost-effective add-on service with which Barracuda customers can achieve greater levels of resiliency. Cloud Liveboot is available in the US, Canada, Europe, and APAC.

## SUPPLEMENTAL MATERIAL

### Online Resource

The online version of Figure 4 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

### Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- **Executive strategy briefings.** We asked vendors to provide us with a briefing on their vision for the DRaaS market, strategy, and differentiation.
- **Customer reference survey.** To validate product and vendor qualifications, Forrester also fielded a survey to two to four of each vendor's current customers.

### The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to <http://www.forrester.com/marketing/policies/forrester-wave-methodology.html>.

### **Forsights Methodology**

Forrester's Forsights Hardware Survey, Q3 2013, was fielded to 2,306 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from SMB and enterprise companies with two or more employees. This survey is part of Forrester's Forsights for Business Technology and was fielded from June 2013 to August 2013. ResearchNow fielded this survey online on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates. We have provided exact sample sizes in this report on a question-by-question basis.

Forrester's Forsights Budgets And Priorities Survey, Q4 2013, was fielded to 3,382 IT executives and technology decision-makers located in Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Japan, Malaysia, Mexico, the Philippines, New Zealand, Russia, Singapore, the UK, and the US from small and medium-size business (SMB) and enterprise companies with 100 or more employees. This survey is part of Forrester's Forsights for Business Technology and was fielded from June 2013 to September 2013. ResearchNow fielded this survey online on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates. We have provided exact sample sizes in this report on a question-by-question basis.

Forrester's Forsights Hardware Survey, Q3 2012, was fielded to 2,330 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from small and medium-size business (SMB) and enterprise companies with two or more employees. This survey is part of Forrester's Forsights for Business Technology and was fielded from June 2012 to August 2012. LinkedIn Research Network fielded this survey online on behalf of Forrester. Survey respondent incentives include gift certificates and research reports. We have provided exact sample sizes in this report on a question-by-question basis.

Forrester's Forrsights Budgets And Priorities Tracker Survey, Q4 2012, was fielded to 3,753 IT executives and technology decision-makers located in Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Japan, Malaysia, Mexico, the Philippines, New Zealand, Russia, Singapore, the UK, and the US from small and medium-size business (SMB) and enterprise companies with 100 or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded from August 2012 to November 2012. LinkedIn Research Network fielded this survey online on behalf of Forrester. Survey respondent incentives include gift certificates and research reports. We have provided exact sample sizes in this report on a question-by-question basis.

Forrester's Forrsights Hardware Survey, Q3 2011, was fielded to 2,343 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the United States from companies with two or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded during July and August 2011. The LinkedIn Research Network fielded this survey online on behalf of Forrester. Survey respondent incentives include a choice of gift certificates or charitable donations. We have provided exact sample sizes in this report on a question-by-question basis.

Forrester's Forrsights Budgets And Priorities Tracker Survey, Q4 2011, was fielded to 3,752 IT executives and technology decision-makers located in Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Japan, Malaysia, Mexico, New Zealand, the Philippines, Russia, Singapore, the UK, and the US from small and medium-size business and enterprise companies with 100 or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded from September 2011 to December 2011. LinkedIn Research Network fielded this survey online on behalf of Forrester.

Forrester's Forrsights Hardware Survey, Q3 2010, was fielded to 2,321 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from SMB and enterprise companies with two or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded from June 2010 to August 2010. LinkedIn Research Network fielded this survey online on behalf of Forrester. Survey respondent incentives include a choice of cash, gift certificates, or a summary of the research results.

Forrester's Forrsights Budgets And Priorities Tracker Survey, Q4 2010, was fielded to 2,612 IT executives and technology budget decision-makers located in Australia/New Zealand, Brazil, Canada, China/Hong Kong, France, Germany, India, Japan, Mexico, Russia, the UK, and the US from SMB and enterprise companies with 100 or more employees. This survey is part of Forrester's Forrsights For Business Technology and was fielded from October 2010 to December 2010. LinkedIn Research Network fielded this survey online on behalf of Forrester. Survey respondent incentives included choice of gift certificates or research reports. We have provided exact sample sizes in this report on a question-by-question basis.



Each calendar year, Forrester's Forrsights for Business Technology fields business-to-business technology studies in more than 17 countries spanning North America, Latin America, Europe, and developed and emerging Asia. For quality control, we carefully screen respondents according to job title and function. Forrester's Forrsights for Business Technology ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of IT products and services. Additionally, we set quotas for company size (number of employees) and industry as a means of controlling the data distribution and establishing alignment with IT spend calculated by Forrester analysts. Forrsights uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

We have illustrated only a portion of survey results in this document. To inquire about receiving full data results for an additional fee, please contact [Forrsights@forrester.com](mailto:Forrsights@forrester.com) or your Forrester account manager.

### Integrity Policy

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### ENDNOTES

- <sup>1</sup> The chance that you could successfully recover IT operations without having exercised your DR plans on a regular basis is slim at best. The chance that you could successfully recover and meet your recovery objectives is zero. Yet Forrester finds that exercising DR plans is one area in which many organizations continue to fall short. As you look at improving your preparedness, one area you cannot ignore is your exercise regimen. See the October 26, 2011, "[Disaster Recovery Exercises Fall Short Of The Finish Line](#)" report.
- <sup>2</sup> DRaaS solutions are prepackaged services that provide a standard DR failover to a cloud environment that you can buy on a pay-per-use basis with varying rates based upon your recovery point objective (RPO) and recovery time objective (RTO). Service providers either deploy agents to replicate data and applications or use image-based backups to send data to the cloud. The critical feature is that the provider can run customers' production environments out of the cloud during disaster declarations or testing. Some of these solutions also require an on-site device for connection. See the March 20, 2012, "[An Infrastructure & Operations Pro's Guide To Cloud-Based Disaster Recovery Services](#)" report.
- <sup>3</sup> In the following report, IBM, HP, and SunGard are the top dogs. These three vendors were in a close race, each with strong product offerings and global presence. All three particularly excelled in their virtual recovery services offerings and planned service enhancements. See the June 9, 2010, "[The Forrester Wave™: Disaster Recovery Services Providers, Q2 2010](#)" report.

- <sup>4</sup> Verizon Terremark is a top telecommunications provider with a very large North American presence, with more than 2,000 unique clients in the region. Verizon Terremark emphasizes the business value and cost-controlling aspects that it delivers through managed security services and helps clients allocate resources to the most critical assets through its enhanced risk-based correlation engine. Verizon Terremark employs one of the largest security teams in the market with an aggressive recruiting strategy. Companies searching for a full host of services with a focus on cost should strongly consider Verizon Terremark. See the March 26, 2012, [“The Forrester Wave™: Managed Security Services: North America, Q1 2012”](#) report.
- <sup>5</sup> A cold site is traditionally known as an alternate facility that does not have the necessary infrastructure for recovery preinstalled; you must provision it at the time of the disaster. A cold cloud, however, is a recovery cloud environment that contains backup images of the environment that must be first rehydrated before recovery. In this scenario, the cloud resource that you consume (meaning you pay for it continuously) is storage. Achievable RTOs are usually 6 to 48 hours and RPOs are 24 to 48 hours. See the March 20, 2012, [“An Infrastructure & Operations Pro’s Guide To Cloud-Based Disaster Recovery Services”](#) report.

## About Forrester

A global research and advisory firm, Forrester inspires leaders, informs better decisions, and helps the world's top companies turn the complexity of change into business advantage. Our research-based insight and objective advice enable IT professionals to lead more successfully within IT and extend their impact beyond the traditional IT organization. Tailored to your individual role, our resources allow you to focus on important business issues — margin, speed, growth — first, technology second.

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