the *Availability Digest*

Disaster Recovery as a Service
September 2017

Gartner, Inc. is an American research and advisory firm providing information technology related insight for IT and other business leaders located around the world. Gartner has just published its research paper on Disaster Recovery as a Service (DraaS). The Garner report can be found at

http://www.availabilitydigest.com/public_articles/1209/Gartner_DRaaS.doc

In this paper, Gartner reviews several companies that are providing DraaS services. Gartner estimates that DraaS is currently a $2 billion business, and that it will reach $3.7 billion by 2021.

As one involved in high availability systems, it is clear to me that every mission-critical system must have a means to recover should it fail. This is often done by providing a passive backup system ready to take over production processing if it is needed. A better architecture is to run two systems as an active/active pair, each processing transactions. Alternatively, a system can be backed up in a cloud. Gartner's paper focuses on companies that offer disaster recovery as a service to clients who wish to have a backup for their critical systems.

Gartner Comparison Criteria

Gartner compares the companies based on nine attributes:

Market Size: The providers varied from servicing only small businesses to those focusing on large enterprises. The enterprise size often tied into the price points.

Sales Channel: Some vendors sold directly to customers, while others used sales channels. Some vendors sold with both methods.

Replication: Some providers used their own replication products, while others used commercially available products.

Recovery: Similarly, some vendors used their own failover and failback products, while others used commercially available products.

Data Centers/Recovery Targets: There was a mix among vendors of those who used their own data centers and those who used colocation providers or public cloud providers.

Recovery Infrastructure: Some vendors used hyperscale cloud providers such as Amazon Web Services, Microsoft Azure, or Google Compute Platform. Others provided their own infrastructure.

Recovery Beyond x86 Workloads: Support varied greatly among vendors. Some supported only x86 workloads, while others supported Unix and Linux systems.

Support Service Options: Some vendors supported only self-service options for customers, while others supported fully managed service.

Primary Focus: For some vendors, focus is primarily disaster recovery and DraaS. For others, these were part of a larger service offering.

Gartner Scoring Emphasis

Gartner uses the following eight attributes for scoring a company:

Value for the Money: A major driver for customer adaption of DraaS is cost reduction or cost avoidance.

Minimum Viable Product: The product should include seamless support for heterogeneous workloads and orchestrating recovery and failback.

Degree of Vendor Focus: Many vendors use DraaS as one tool in their toolbox toward enabling larger, complex engagements.

Offering (Product) Strategy: Various DraaS offerings are becoming commoditized.

Compliance and Global Reach: The importance of the vendor's global reach is increasing due to geopolitical concerns and regulatory needs.

Security: Providers who have included in their offerings security protections against malware such as ransomware benefited in their scoring.

Partial Functionality for Self-Managed Versus Fully Managed: Portal functionality is important for all providers as it pertains to their ability to enable recovery of workloads underpinning business processes.

End Users Versus Managed Providers: The Gartner report is intended to help end customers determine which DraaS providers may be a good match.

Gartner Ability to Execute Criteria

The companies were compared according to the following Ability to Execute criteria:

Product/Service: The breadth and depth of DraaS service offerings.

Overall Viability: The organization's overall financial health.

Sales Execution/Pricing: The organization's capabilities in all presales activities.

Market Responsiveness and Track Record: The organization's ability to respond to market change.

Marketing Execution: The organization's ability to deliver the organization's message in order to influence the market.

Customer Experience: The products and services that enable customers to achieve anticipated results with the products evaluated.

Operations: The ability of the organization to meet goals and commitments.

The Ability to Execute Criteria were weighted as follows:

- Product or Service   High
- Overall Viability   High
- Sales Execution/Pricing   High
- Market Responsiveness and Track Record   Medium
- Marketing Execution   Low
- Customer Experience   High
- Operations   High

Gartner Completeness of Vision Criteria

The companies were further evaluated based on the following Completeness of Vision criteria:

Market Understanding: The vendor's ability to understand customer needs and translate them into products and services.

Marketing Strategy: The vendor's messaging communicated internally and through social media, advertising, and customer programs.

Sales Strategy: The vendor's strategy for selling including direct and indirect sales, marketing, service, and communication.

Offering Strategy: The organization's approach to product development and delivery that emphasizes market differentiation.

Business Model: The design and execution of the organization's business proposition.

Vertical/Industry Strategy: The strategy to direct sales and product development skills and products to meet the needs of individual market segments.

Innovation: Synergistic layouts of resources for investment purposes.

Geographic Strategy: The vendor's strategy to direct resources to meet the needs of specific geographical regions.

The Completeness of Vision Criteria were weighted as follows:

- Market Understanding   High
- Marketing Strategy   Low
- Sales Strategy   Low
- Offering Strategy   High
- Business Model   Medium
- Vertical/Industry Strategy   Medium
- Innovation   High
- Geographic Strategy   High

Vendor Strengths and Cautions

The Gartner report then describes the strengths and weaknesses of several DraaS providers. These vendors include:

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- Acronis
- Axcient
- Bluelock
- C&W Business
- Carbonite
- CloudHPT
- Daisy
- Databarracks

- Datto
- Evolve IP
- Expedient
- IBM
- iland
- Infrascale
- Microsoft
- NTT Communications

- Peak 10
- Quorum
- Recovery Point
- StorageCraft
- Sungard
- TierPoint
- Unitrends

The Gartner Magic Quadrant

The following is the 2017 Gartner Magic Quadrant for the companies listed above that Gartner evaluated for their DraaS capabilities.

Summary

As more of the analog world becomes digitized, downtime affects more people. However, I submit that infrastructure and operations leaders must now shift their thinking away from internally facing DR strategies toward strategies for sustaining externally facing IT service continuity. This is especially true for those who will be tasked with supporting digital business and the Internet of Things (IoT), because the effectiveness of their strategies will be measured by the quality of the external customer experience and by the impact of that experience on the company's revenue and profitability.

Acknowledgements