



Storage Decisions

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The New Data Protection War

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ESG

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What is Continuous Data Protection?

“Software- or appliance-based solution designed to capture every write to primary storage and make a time-stamped mirror copy on a secondary device. The objective is to be able to rapidly recreate and restore data -- with tremendous granularity -- as it existed at any previous point in time.”

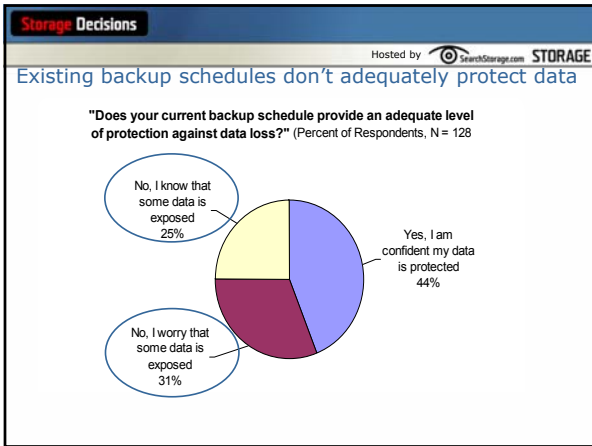
ESG, 2005

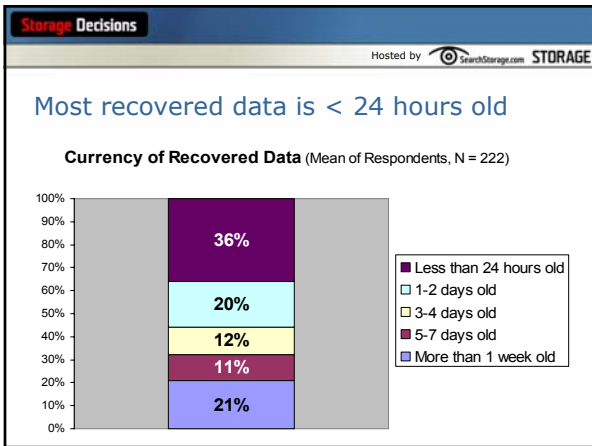
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Application availability is an issue

- **31% of organizations say they'll experience significant revenue loss or another adverse business impact with 1 hour or less of application downtime. 58% with 4 hours or less of application downtime.**
- **29% of users don't believe their current backup/recovery solution is meeting application availability requirements.**






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A better mouse trap

- **CDP vs. K-CDP**
 - **CDP is transaction granular**
 - **K-CDP (kinda CDP) is snapshot granular**
 - **Both are better than what you do today!**


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A better mouse trap (cont.)

- **Traditional backup/recovery yields RPOs averaging 12+ hours and RTOs ranging from 4-24 hours depending on the size of recovery.**
- **CDP/K-CDP-based BU/recovery will yield RPOs of minutes to a few hours (80% + reduction) and RTOs typically less than 1 hour (75%+ reduction).**


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Where should CDP execute?

- **Everywhere -- across the entire data protection landscape.**
- **CDP/K-CDP is an RPO enhancer and as such should be implemented across all the "tiered" stages of the data protection schema.**


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CDP and ILM

- **CDP is the KILLER APP for creating a useful tiered infrastructure.**
 - Keep 24 hours of real-time data on recovery tier 1 disk (CDP)
 - Keep day 1-10 on recovery disk tier 2 (K-CDP – 2 hour increments)
 - Keep day 10-60 on recovery disk tier 3 (K-CDP – 8 hour increments)
 - Keep day 61-forever on recovery tape tier 4

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Where should CDP execute?

- **A: As a discrete device**
- **B: As a component/feature of backup**
- **C: in replication software/appliances**
- **D: as standalone software**

● **Answer: Yes**


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Who does what?

- **A: As a discrete device**
 - Revivio
 - EMC (soon)
 - StorageTek
 - HP (soon)
 - IBM (not sure when)
 - Quantum


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Who does what?

- **B: As a component/feature of backup**
 - Veritas (Panther – BU/Exec)
 - Avamar
 - Atempo
 - LiveVault
 - Asempra
 - CommVault


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Who does what?

- **C: In replication software**
 - **XOsoft**
 - **Kashya**
 - **InMage**
 - **EMC (Replistor)**


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Who does what?


- **D: Standalone software**
 - **IBM**
 - **Asempra**
 - **TimeSpring**
 - **Mendocino**
 - **Falconstor**
 - **Files-X**
 - And introducing ...

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The 800-pound gorilla

- **Your friend and mine...**
 - That nice, easy to deal with, barely competitive...
 - Generally good natured...
 - Often misunderstood...

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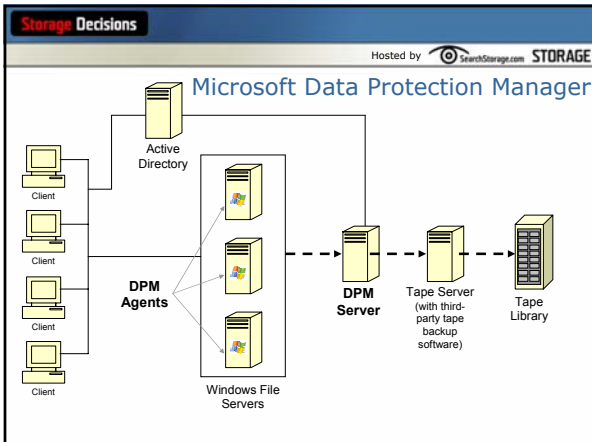
The guys who ate the 800-pound gorilla

Little Billy and the boys
from Microsoft!!!!

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What is DPM?

- *A K-CDP offering that resides on a server**
- *Takes/houses up to 64 "Snapshots"**
- *Supports Windows FILES only -- no Exchange, no SQL, no Linux**



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DPM research conclusions

- **Users are absolutely open to Microsoft**
- **Key drivers: integration with MSFT apps, standardization on Windows platform, leverage existing skills -- not features/functionality**
- **Do users have concerns? Sure; no heterogeneous OS support, additive solution not replacement**
- **Users also skittish about MSFT security**
- **Bottom line: all but the smallest or non-existent Windows shops will try -- and probably buy -- DPM at some point**

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Users would consider a Microsoft solution

Do you believe your organization would consider using a data protection solution from Microsoft such as DPM?
(Percent of respondents, N = 228)

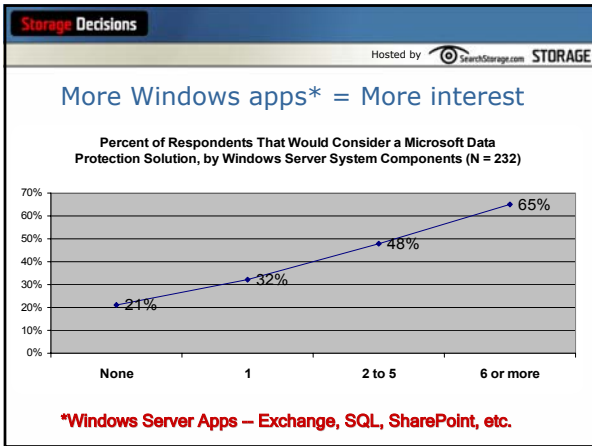
Response	Percentage
Yes	47%
No	23%
Don't know	30%

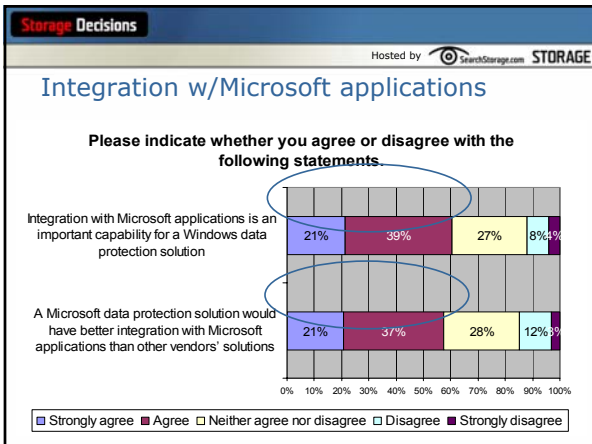
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Bigger Windows shops are more interested

Percent of Respondents that Would Consider a Microsoft Data Protection Solution, by Windows Server Environment (N = 232)

Windows Server Environment	Percent of Respondents
1% - 25% Windows	19%
26% - 50% Windows	47%
51% - 75% Windows	48%
76% - 100% Windows	55%

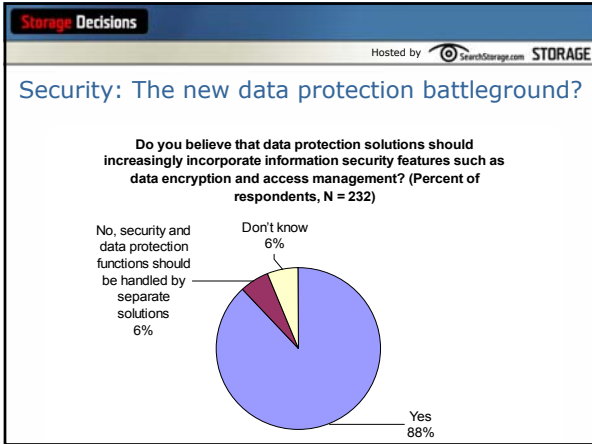


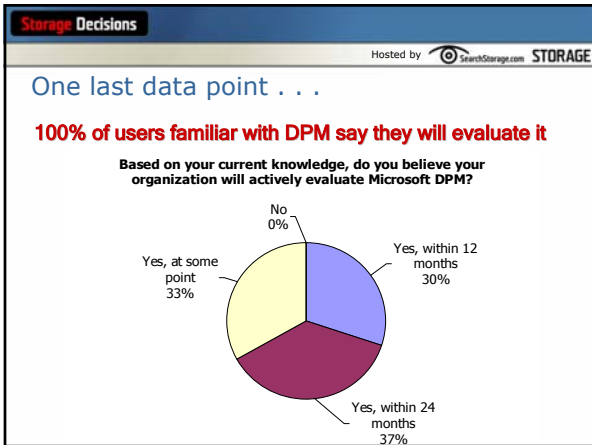


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Security: The new data protection battleground?

- **More than 50%** of users surveyed tell ESG they have more concerns about the security of a Microsoft solution than they do with other vendors
- **88%** of users say data protection solutions should incorporate more security features
- **Implication?** Expect MSFT, Symantec/Veritas, EMC/Legato, CA and everyone else to battle it out over security strategy






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What's the point?

- **DPM will absolutely provide better, more granular RPOs to Windows file environments. It will help make it easier to manage licenses on file servers and is much better than recovering from tape.**
- **It will NOT make your life easier initially -- you won't be able to add DPM and take anything else away -- i.e. you won't be able to toss out your existing backup software, at least not for a while.**


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Market impact

- **Research tells us that people don't know or don't care if the product solves real problems -- they *will* use it.**
- **Someone still needs to backup DPMs, archive DPMs, move DPM data to tape and replicate DPMs off site. You should consider DPM another application in your environment that needs to be managed and protected.**


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Market impact (cont.)

- **Non-MS vendors should embrace DPM's inevitable market position and be the ones to provide the missing services all around it.**
- **Smart vendors will offer "DPM-ready" products**
- **Dumb vendors will say "Our Stuff Is Way Better Than DPM" or the classic "DPM Sucks." Who cares?????**

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Conclusion

- **There is precedent: SAK (MS Storage Server) owns more than 50% of the NAS installations already**
- **It's going to enter your shop; just be prepared to know what it can and cannot do. Don't sell yourself short.**
- **It will drive down the cost of CDP solutions across the board, which is good.**
- **It may get you to actually start to solve your RPO/RTO issues, and that's also good.**

Questions?

Thank You!!!

- **For copies of the presentation, send an e-mail to jenniferb@enterprisestrategygroup.com**
