

For the data management market, the value proposition grows with data volume

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Longtime backup, data protection and disaster-recovery players are evolving past their traditional offerings in order to not just protect data but to make it useful. Copy data management in particular has provided a logical segue into more advanced forms of data management and data-as-a-service offerings for some vendors, such as Actifio. With enterprises facing ongoing cloud transformation and migration, as well as the struggles of continuous data management, storage vendors are using the opportunity to take advantage of the need for greater workload mobility.

The 451 Take

While the previous generation of secondary storage platforms focused on data retention and efficiency, the next wave of innovators do not stop at cost reduction. These vendors believe the driving factor for acquiring their technology will be their ability to help organizations extract deeper business insights and value from data. Primary storage still accounts for a large portion of enterprise storage spending, but the value proposition for secondary storage and its management has increased substantially in recent years, and as such, we are seeing much innovation and investments made to take advantage of the growing opportunity around secondary storage, management and insights. This value proposition will grow exponentially driven by factors such as compliance and the emergence of new workloads such as IoT and mobile applications, which will motivate organizations to seek out new software, services and secondary storage systems to match their changing needs.

The challenges of accelerating unstructured data growth

Storage budget growth will be modest going into the rest of 2017, and will continue to be outpaced by the growth of data. Although data growth is good for enterprises in terms of its potential value to enhance insights and customer experiences, there is often limited visibility provided by traditional storage platforms and this visibility is needed for data governance across storage tiers, cloud included. Unstructured data consists of a broad group of data types that includes media data such as audio and video files often found in file repositories, with media files often difficult to compress. Large repositories of unstructured data can prove difficult to manage, especially with IT organizations being forced to manage more data without growing administrator headcounts.

Workload mobility and management tools

Recent data management tools are about several key things including making data more visible and accessible through easier management, and making access more intelligent through policies and automation. Scalability allows for greater availability. Scale-out platforms are providing much in the way of mobility and can facilitate data consolidation and analytics and also eliminate the need for additional appliances. Consolidation has previously been part of the allure of copy data management since it simplifies both data protection and management. However, the core value of CDMs is becoming insufficient compared with the wants of many enterprises, hence the evolution by some vendors to data as a service to provide accelerated and intelligent access to data. Automation is another mobility enhancer and an area of interest for many vendors. For example, having the ability to automate functions like copy expiration at a tier level can reduce the level of oversight needed in terms of management while also helping curb the volume of unused data.

As enterprises transition into hybrid cloud deployments that combine the capabilities of on-premises storage systems and public cloud storage systems, users will face challenges based on the requirements of moving data between object platforms. This is where migration offerings come in. Advances in migration capabilities provide an easier way to deal with on-premises data; workload migration is now of strategic usefulness to disaster-recovery vendors. Data management vendors are increasingly incorporating security features as an extra value add as backup products can offer an additional fail-safe at the server level for protecting data from threats like ransomware.

Recent data management coverage

The following includes some of our more recent coverage on the data management space as offerings continue to evolve to address the mobility of data in storage. There is still room for growth in an increasingly consolidated storage industry.

- Cohesity extends its reach deeper into the broad market for secondary storage ([/report-short?entityId=91724](#))
Secondary storage continues to be a big market opportunity that should only grow as the rate of data and workload growth accelerates. The stagnant backup target market, which is a multibillion-dollar opportunity, is the low-hanging fruit that is providing startups such as Cohesity with an opportunity to quickly grow their customer counts and revenue bases. The vendor recently secured a \$90m series C funding round, which will accelerate its product development and grow its sales and marketing teams.
- Komprise reins in data growth with analytics and intelligent migration ([/report-short?entityId=92100](#))
Self-described as an 'intelligent data management' vendor for the cloud era, Komprise has lofty aspirations and a management team with a few successful exits under its collective belt. The three-year-old startup's value proposition is easy to comprehend – its software finds inefficiencies in a storage environment and migrates data to an appropriate medium to facilitate cost savings and free up high-performance resources for data that is in demand. Komprise recently landed new funding in the form of a \$12m series B round, and is now looking to accelerate its sales growth.
- Quantum improves unstructured data management with StorNext 6 ([/report-short?entityId=92252](#))
With version 6 of its StorNext tiered storage system, scale-out vendor Quantum is focusing on data management and visibility. The StorNext ecosystem encompasses Quantum's scale-out storage appliances and accompanying management software. With the latest version, it is positioning itself to counteract the problem of the growing amount of data that enterprises are accumulating and the management challenges that maintaining this data presents.
- Actifio aims to convert data capture into business value ([/report-short?entityId=92197](#))
Actifio was a pioneer of copy data management (CDM) software aimed at controlling the number of copies of data that

can accumulate as a result of the data protection and management processes at mid-sized organizations and enterprises. It recently repositioned itself as an enterprise data-as-a-service company that helps customers deliver their data instantly, to provide a number of key benefits, including the acceleration of product development, data protection, cloud-to-cloud mobility and cost reduction. Ongoing digital transformation and changes in infrastructure that are affecting enterprise storage decision-making have underscored the importance of making wise secondary-storage choices. Actifio has recently undergone a self-imposed transformation of its own as it has moved beyond its roots as a CDM-focused vendor to better address the shifting backup needs of enterprise customers.

- [Acronis marches forward with Acronis Backup 12.5 Advanced \(/report-short?entityId=92371\)](/report-short?entityId=92371)
Acronis is a data protection veteran with backup and disaster-recovery products aimed at consumers, SMBs, enterprises and service providers. However, the backup market is currently undergoing a market transformation, and Acronis is updating its Backup Advanced product accordingly. Currently in beta, many of the features found in Acronis Backup 12 Advanced are designed to make usage easier for larger enterprises.
- [Code42 leverages endpoint backup to leap into data management and security \(/report-short?entityId=92543\)](/report-short?entityId=92543)
Code42 got its start as an endpoint data-protection specialist and has steadily added to its product portfolio, while extending from on-premises to SaaS offerings. Enhancing backup and recovery products with additional levels of security and data management capabilities has been a trend in the market, and the company has focused its product development efforts on adding search and data analytic capabilities, which are at the core of the recently released version 6.0.

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