



## MARKET PERSPECTIVE

# Commvault Launches HyperScale Software, HyperScale Appliance, and ScaleProtect with Cisco UCS to Meet Scale-Out, Software-Defined, Cloud-Ready Data Protection Needs

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## EXECUTIVE SNAPSHOT

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### FIGURE 1

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#### Commvault's Latest Data Protection Offerings: HyperScale Software, HyperScale Appliance, and ScaleProtect with Cisco UCS

Commvault has launched HyperScale technology – available as HyperScale Software, HyperScale Appliance, and ScaleProtect solution – built on Cisco UCS. HyperScale solutions are the latest data-protection offerings from Commvault that are software-defined and scale-out in their architectures, aimed at helping enterprises modernize their data management environments in the multicloud era.

#### Key Takeaways

- Commvault HyperScale technology comes in two types – as a software and reference architecture for deployment across a variety of server hardware configurations, and as a prebuilt appliance called Commvault HyperScale Appliance on Red Hat and Fujitsu hardware.
- Commvault has also collaborated with Cisco and launched ScaleProtect, a data protection solution built with HyperScale technology and Cisco UCS.
- HyperScale solutions are scale-out, cloud-ready data management solutions aiming to provide data protection and recovery for workloads across virtual and cloud infrastructures.

#### Recommended Actions

- HyperScale and ScaleProtect come at a time when interest in data protection has peaked, thanks to tightening regulations and complexities in IT infrastructures.
- Commvault should now focus on educating partners and enterprises about the value of scale-out, cloud-ready data management and keep up the momentum in innovation.
- Commvault should highlight modern features such as APIs, software-defined approach, cloud-like scalability, and unified data protection across primary and secondary data environments. In addition, the business model is also relevant in the cloud era because of consumption-based pricing, ability to start small and scale to petabyte (PB) level, and appliance or software purchase options.

Source: IDC, 2017

## NEW MARKET DEVELOPMENTS AND DYNAMICS

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Data as an asset is at the heart of digital transformation. It makes business decisions faster, more accurate, and more insightful, helping to improve customer experiences. Data management and data protection are key to turning data into business assets because it helps organizations secure and protect data, remain compliant with regulatory requirements, and facilitate more effective analytics. Data governance is also a top-of-mind priority for businesses in the run-up to GDPR enforcement in May 2018.

However, unprecedented growth in data, heterogeneous and complex datacenter infrastructure, multicloud strategies, fragmented backup silos, and sprawling application assets are making traditional approaches to data management unfit and unfulfilling. Many organizations find that multiple point-based data management tools are adding complexities that affect storage performance, efficiency, and costs.

IDC's 2017 *Datacenter End-User Survey* of more than 640 datacenter managers found that improving backup performance, ensuring critical workloads are restored in minutes, and managing copy data as key challenges.

Enterprises are seeking data management solutions that can offer protection, resilience, and simplified management across primary and secondary data, as well as bring cloud-like flexibility, simplicity, economics, and scalability.

### Enterprises Entering a New Era of Data Management

A "cloud first" declaration has become a common mandate among enterprises serious about their business transformation. Years of frustration over slow enablement of applications and slow response time from on-premises infrastructure prompted business users and developers to rush to the public cloud for speed, agility, and instant scalability. After an initial rush to the public cloud, it is emerging that regulatory compliance, governance, IT control, stability, reliability, and availability are equally critical for digital transformation success. As a result, there's a private cloud renaissance making hybrid cloud and multicloud infrastructures the next frontiers in IT.

In fact, IDC predicts that by 2018, 80% of enterprise IT organizations will be committed to bring together the best capabilities from multiple platforms: traditional IT, private cloud, and public cloud solutions. IDC's cloud infrastructure spending tracker forecasts that in EMEA, double-digit growth is expected across on-premises private cloud (12.3% CAGR), hosted private cloud (17.3%), and public cloud (18.3% CAGR) to 2020, making multicloud a reality.

But there is no denying that public cloud has fundamentally reset IT users' expectations. Today, internal and external consumers of on-premises enterprise IT resources demand the same agility, scalability, and responsiveness of public clouds.

As a result, CIOs are challenged to bring true cloud-like simplicity and flexibility to their datacenters to stay competitive and to support their businesses. IT leaders are adopting next-gen technologies such as hyperconverged or converged platforms, software-defined architectures, and unified data management solutions to modernize enterprise IT so that it can offer public-cloud-like experience around ease of use, responsiveness, agility, and scalability. But at the same time, ensure governance strategy, compliance, and control over IT, and avoid cloud or vendor lock-in. IT infrastructure built on these modern technology building blocks also pave the way for newer business process such as DevOps, continuous digital innovation, application programming interface (API) principles, and openness and interoperability.

The need for software-defined, scale-out, and cloud-like solutions is not restricted to core infrastructures alone. Enterprises are seeking to break away from data-protection solutions that are traditional, hardware-oriented, expensive, and scale in a limited way are limiting enterprises from recognizing their "end-to-end cloud-like IT" vision.

The proliferation of cloud storage and as-a-service offerings are changing buyer behavior. Enterprise buyers are shifting to scale-out, cloud-ready storage solutions, and this shift in purchasing is dragging down legacy, hardware-defined solutions in the data management and storage management space. IDC forecasts that the software-defined storage market will grow the fastest with a CAGR of 13.5% to 2021, especially fueled by hyperconverged solutions (26.6% CAGR).

### ***Growing Importance of Secondary Data***

There is another trend among data architectures within enterprises – growing ambiguity in what is primary data and what is secondary data. Traditionally, production and original data was categorized as primary, while copy data, backup data, and disaster recovery (DR) data was broadly considered as secondary. Today, organizations deal with huge volumes of unstructured data stored in file or object-based storage that can either be primary or secondary data, thanks to digital transformation related activities such as social business data analytics, Internet of Things (IoT), and so on. In addition, not all test and dev data is copy data, making secondary storage and data management equally critical.

These broad trends – such as the blurring of lines between primary and secondary data, as well as the need to cloudify full IT and data environments – make Commvault's latest launch of software-defined scale-out data protection software significant. The vendor has launched data management software and reference architecture Commvault HyperScale Software, prebuilt appliance Commvault HyperScale Appliance, and a combined solution with Cisco called ScaleProtect on UCS.

### **Commvault HyperScale Software**

It is a scale-out, cloud-ready data management software offering data protection and recovery for workloads across virtual and cloud infrastructures. As a software-defined solution, Commvault HyperScale can be deployed on servers from vendors including Fujitsu, Cisco, Lenovo, HPE, Super Micro Computer, Huawei, and Dell EMC. IDC believes many large enterprises typically have some hardware resources that are not "fully sweated out" but have limited skills and time to implement software-defined infrastructures for data protection environments. Commvault HyperScale's pretested and validated reference architectures can help organizations deploy cloud-like data management solutions using best-practices deployment tips and optimize their existing hardware assets to cut costs.

The software includes data management features such as deduplication, erasure coding (to avoid single points of failures), continuous monitoring, security, and patch management. It combines Commvault Data Platform's disaster recovery and high-availability features as well as automation, orchestration, and self-service capabilities. In our opinion, integrating Commvault Data Platform's key features with Commvault HyperScale can allow existing customers to unify their data management experience across primary and secondary storage infrastructures, simplifying management complexities.

The HyperScale software has cloud-ready features such as modular scalability for non-disruptive capacity upgrades and consumption-based pricing. It also brings full integration to public cloud services such as AWS, Google, Oracle, and Azure, and it includes REST APIs to enable automation of complex tasks and policies, varying service levels for recovery point objects (RPOs) and recovery time objects (RTOs).

In IDC's opinion, features such as simplicity, flexible pricing, automation, orchestration services, programmable APIs, and direct data access through standard interfaces can help enterprises modernize data management infrastructure for hybrid and multicloud strategies.

## Commvault HyperScale Appliance

For customers wanting a prebuilt and supported variant of the technology, Commvault HyperScale Appliance integrates compute, storage, networking, virtualization, backup and recovery, full life-cycle data management, and analytics into a single platform across the datacenter and in the cloud. The "hyperconverged" appliance can save customers time on hardware acquisition, installation and integration, daily management, updates, and security.

Commvault HyperScale Appliance is suited to protect and manage data across remote offices and edge locations as a unified, scale-out solution. It has data capacities ranging from 32TB up to 80TB, with the ability to scale out in different configurations up to multi-PBs scale to meet customer requirements.

The appliance can be purchased through subscription licensing with an option to refresh hardware every three years. It combines scale-out data protection approach with broad enterprise application, file systems, and hypervisors, and it also includes orchestration and automation capabilities, making it relevant for enterprises modernizing their IT infrastructures. IDC believes enterprises (especially in financial services, retail, and public sector) have a need to protect and manage data across multiple remote offices, branch offices, and distributed datacenters. They are increasingly leveraging hyperconverged technologies that bring software-defined, cloud-like features in a simpler, ready-to-use way.

## ScaleProtect with Cisco UCS

The prebuilt HyperScale software into Cisco UCS – ScaleProtect – is aimed at Cisco customers requiring a UCS solution combined with Commvault data protection to deploy scale-out secondary storage and unify their data management strategies. Through a reference architecture program, ScaleProtect for Cisco UCS is available on its price book. Essentially "cloud-ready data management on UCS," ScaleProtect integrates compute, storage, networking, virtualization, Commvault data protection, and HyperScale software. Large enterprises can use Cisco S Series UCS and have denser (30PB+) architectures to manage their largest, fastest-growing, and dynamic workloads.

In IDC's opinion, the Commvault HyperScale Appliance or the ScaleProtect with Cisco UCS offering will appeal to midsize organizations with limited IT staff or ones with IT generalists rather than dedicated storage or server admins. The scale-out option will also give large enterprises a foundation as their data velocity continues to accelerate.

Commvault HyperScale Software, Commvault HyperScale Appliance, and ScaleProtect with Cisco UCS represent Commvault's engineering efforts to bring a scale-out infrastructure to its flagship solution and seamlessly integrate with storage arrays, hypervisors, applications, and public cloud services to support the heterogeneous multicloud and hybrid environments.

The launch also comes at a time when interest in data protection market has peaked, thanks to the imminent enforcement of GDPR in May 2018.

Organizations are maturing in their GDPR readiness journey and are now ready to make technology investments to support compliance. They are actively seeking solutions to maintain regulatory compliance as well as to use the regulation as a trigger to modernize legacy data management infrastructure.

IDC expects GDPR's influence in organizations' storage purchase decisions to gather further momentum in the last quarter of 2017, peak in 2018, and continue its influence in 2019. We expect that by 2021, most organizations will have strategies and the foundations in place for compliance. Following this five-year time frame, GDPR investments will become an organic part of storage technologies investments and refresh cycles.

We forecast GDPR to drive a significant portion of storage investment until 2021 in these areas:

- **Public cloud storage services (38.2% CAGR).** Cloud backup, basic public cloud storage, archiving, data protection and recovery, and storage replication services
- **Storage software (28.8% CAGR).** Archiving, data protection and recovery, and storage replication software services
- **Secondary storage (3.7%).** Purpose-built backup appliances

## ADVICE FOR COMMVAULT

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In our opinion, Commvault HyperScale's features resonate well with the interest in the market, making its launch strategic and timely. What is significant is that the vendor has innovated not just on cloud-like features, but also in its cloud-like route to market that offers flexible, consumption-based pricing as well as cloud-like scalability and flexibility.

As an immediate priority, Commvault should look to educate and train its channel community to leverage the market's growing appetite for next-generation data management infrastructures. It should also leverage the ecosystem of its hardware partners to add new logos to its roster.

The vendor should also invest in building proofs of concept and use cases to showcase the benefits of Commvault HyperScale and the Commvault Data Platform in helping organizations have an end-to-end, API-driven, software-defined, cloud-ready IT environment.

Especially as there are already some software-defined, cloud-ready data management solutions in the market, the vendor should highlight the key differentiating points, pricing flexibility, and collaboration with Cisco for ScaleProtect with Cisco UCS.

Lastly, it should continue this momentum in innovation and continue to add more cloud and hardware configurations to its Commvault HyperScale mix to offer further flexibility to customers. For ScaleProtect with Cisco UCS in particular, Commvault should look to leverage Cisco's wide reach into large enterprises and explore the hyperconverged appliance model with other server vendors to offer further choice to customers.

IDC's survey shows that the siloed and complex backup environment means backup, archiving, and DR workloads will drive a majority of IT infrastructure investments in the next 12 months for many companies (33%).

But in a crowded data management marketplace with multiple vendor solutions, organizations need to evaluate solutions with due diligence and opt for technologies that can help them overcome their main data-protection-related challenges, and at the same time enable them to execute on their broader infrastructure strategies: automation, analytics, multicloud adoption, and primary and secondary storage consolidation.

## Future Outlook

In conversations with IDC, enterprises cite how their primary focus is to overcome backup and restore challenges. But they instantly cite that they need next-generation data protection solutions that can help them meet their other objectives such as analytics, secondary storage consolidation, and implementing a cloud-ready environment. IDC believes that while point solutions offer targeted results, unified solutions that offer scale-out capabilities are infrastructure-agnostic and can address broader business needs offer more value to customers.

The future of storage and data management is software-defined, server-based, and cloud connected.

IDC believes that as infrastructure and data complexities grow, data management and protection principles will be increasingly applied to data, not to hardware systems storing the data. This shift in principle will fuel demand for data management and protection solutions that are software-defined and hardware-agnostic, as well as bring cloud benefits such as scale, flexibility, and low costs. Based on the Commvault HyperScale launch, it is evident that it is committed to establish itself firmly in this new API-driven, software-defined, cloud-enabled data management world.

Overtime, we believe software-defined architectures will become a de facto option for storing, delivering, consuming, securing, and managing data. When this happens, Commvault HyperScale solutions integrated with the Commvault Data Platform will be well-positioned to help organizations transition to the cloud.

With digital transformation evolving into the next phase within enterprises, and with applications becoming more demanding, dynamic, and complex, enterprises are actively looking to modernize both infrastructure and the data management strategy for success. But data management in the hybrid and multicloud world with ever-changing regulations is a challenging task. Vendors that can assure enterprises and build confidence that they are flexible, cost-efficient, innovative and cloud-friendly, will be the ones that thrive.

## LEARN MORE

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### Related Research

- *European Public Cloud Storage Services Forecast Report, 2016-2021* (IDC #EMEA43016917, September 2017)
- *10 Software and Cloud Services Providers to Consider for Your GDPR Compliance Needs* (IDC #US42277417, August 2017)
- *Western Europe Storage Spending Forecast, 2016-2021: Impact of GDPR* (IDC #EMEA42894616, August 2017)

### Synopsis

This IDC Market Perspective examines Commvault's launch of its data protection technology – HyperScale – available as Commvault HyperScale Software, HyperScale Appliance, or as ScaleProtect solution on Cisco UCS. The solutions aim to help enterprises modernize and unify their data management environments for multicloud and hybrid cloud.

"Enterprises are seeking data management solutions that can offer protection, resilience, and simplified management across primary and secondary data, as well as bring cloud-like flexibility, simplicity, economics, and scalability," said Archana Venkatraman, research manager, IDC's Storage and Datacenter. "Commvault's software-defined, scale-out, and cloud-ready data protection technology Commvault HyperScale is aligned with these market needs."

## About IDC

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