

DISASTER RECOVERY AS A SERVICE MARKET

GLOBAL FORECAST TO 2021

BY SERVICE TYPE (BACKUP, REAL-TIME REPLICATION, DATA SECURITY, & PROFESSIONAL SERVICES), PROVIDER (CLOUD, MANAGED, AND TELECOM & COMMUNICATIONS), DEPLOYMENT, ORGANIZATION SIZE, VERTICAL, & REGION

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1 EXECUTIVE SUMMARY

DRaaS is a category of cloud computing that protects and recovers data from any human or natural disaster. Disaster can occur in many ways such as communication failure, power outage, downtime, data loss, fires, floods, hurricanes, hardware failures, software bugs, security breaches, service disruption, nuclear actions, and terrorism. It is very critical for enterprises and consumers to protect their data to ensure business continuity at all times. The DR service provided through cloud minimizes the operational and capital expenditure incurred. It had been observed that the DRaaS market is increasingly being adopted by enterprises due to its pay-as-you-go pricing model. This model reduces the total cost to a great extent as the organizations need to pay only for the usage done over a period of time.

The cloud-based DR enables the customers and enterprises to store the data and run their systems on cloud. It also reduces the costs; speeds recovery; and frees up resources for other business-critical tasks. The migration to the cloud-based DR cuts the recovery process to hours from days and enables significant savings. The DR on cloud must include automated testing, failover, and networking to ensure business continuity every time in case of natural or manmade disaster. The use of virtualized platforms for DR enables the addition of resources that can be deployed online when the disaster is detected; this further reduces the recovery time after a major failure.

Among the verticals, the BFSI industry is expected to hold the largest market share in 2016 and the media and entertainment vertical is expected to have a significant growth rate during the forecast period. This is due to the increasing amount of data present globally which needs to be secure in the event of disaster. There are four types of DR Services: Backup, Real-Time Replication, Data Security, and Professional Services. Among these service types, backup is expected to hold the largest market share in 2016, whereas professional service is expected to grow at the highest Compound Annual Growth Rate (CAGR) from 2016 to 2021. The market has also been segmented on the basis of providers into Cloud Service Providers (CSPs), Managed Service Providers (MSPs), Telecom & Communication Service Providers, and others. The CSPs segment is estimated to account for the largest market size in 2016, and the MSPs segment is expected to show the highest CAGR during the forecast period.

The DRaaS market research report analyzes global adoption trends, future growth potentials, key drivers, competitive outlook, restraints, opportunities, key challenges, market ecosystem, and value chain analysis. This report also presents a detailed analysis, market sizing, and forecasting for the emerging subsegments within the DRaaS market. The report is thoroughly segmented by service type, provider, deployment model, organization size, vertical, and region.

The report also focuses on various regional markets for each of the subsegments within the DRaaS market. The major regions include North America, Europe, APAC, MEA, and Latin America. North America is expected to hold the largest market share in 2016 with XX%, whereas APAC is in the growth phase and is the fastest-growing region for the global DRaaS market. The key reason for the high growth rate in this region is the explosion of new technologies combined with increasing business needs and increase in the number of organizations adopting DR services.

The primary vendors in the DRaaS market include Amazon Web Services, IBM Corporation, Microsoft Corporation, SunGard Availability Services, VMware Inc., Cable & Wireless Communications, Cisco Systems, HP Enterprises Company, iLand Internet Solutions, NTT Communications Corporation, TierPoint, LLC, and Verizon Enterprise Solutions. This research report studies the strategic alliances and lucrative acquisitions between various global and local players in the DRaaS ecosystem. The players have majorly adopted the strategy of new product launches to enhance their business in the DRaaS market. Vendors are launching new products so as to cater to the need of diverse end users in different geographic regions.

The table given below highlights the market size and Year-on-Year (Y-o-Y) growth rate of the DRaaS market. The DRaaS market is expected to grow from USD XX million in 2015 to USD XX million by 2020, at a CAGR of XX%. The global market is further segmented on the basis of service types, providers, deployment models, organization size, verticals, and regions.

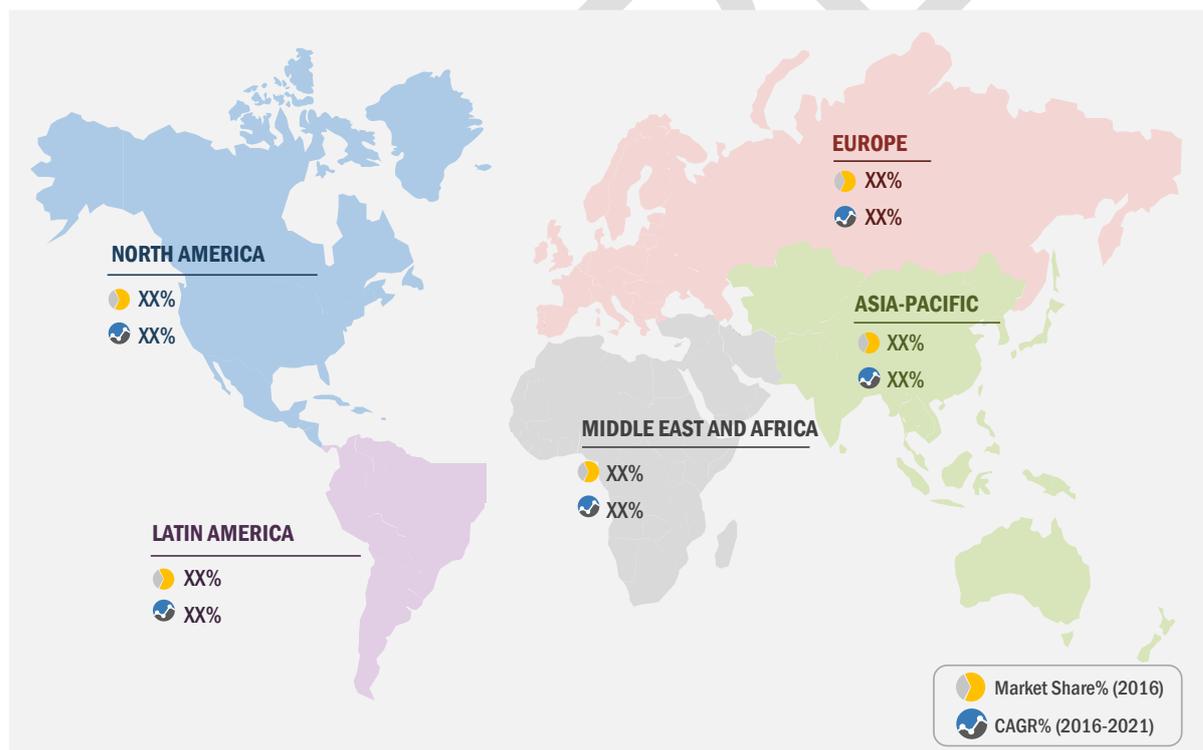
TABLE 1 DISASTER RECOVERY AS A SERVICE MARKET SIZE AND GROWTH RATE, 2014-2021 (USD MILLION)

| Market name | 2014 | 2015 | 2016-e | 2021-p | CAGR (2016-2021) |
|---------------------------------------|------|------|--------|--------|------------------|
| Disaster Recovery as a Service Market | XX | XX | XX | XX | XX |
| Y-o-Y | XX | XX | XX | XX | XX |

Source: Press Releases, Investor Presentations, and MarketsandMarkets Analysis

The figure below represents the regional market share of the five regions. North America is expected to account for almost XX% of the overall DRaaS market share for the year 2016. Europe is projected to account for the second largest market share of XX% of the overall DRaaS market in 2016. APAC is expected to account for XX% of the total market share in 2016, whereas MEA and Latin America are expected to capture XX% and XX%, respectively, in the DRaaS market.

FIGURE 1 NORTH AMERICA IS ESTIMATED TO HOLD THE LARGEST MARKET SHARE IN 2016



Source: Investor Presentations, Expert Interviews, and MarketsandMarkets Analysis

The figure below showcases the top three revenue segments of the DRaaS market for the year 2016. On the basis of service type, backup service is expected to hold the leading market share in 2016 with XX%. Also, BFSI is expected to be the top industry segment with XX% market share in 2016. Moreover, in the providers segment, CSPs segment is expected to lead the market with XX% market share of the overall DRaaS market for the year 2016.

FIGURE 2 TOP THREE SEGMENTS FOR THE DISASTER RECOVERY AS A SERVICE MARKET, 2016-2021



Source: Investor Presentations, Expert Interviews, and MarketsandMarkets Analysis

SAMPLE

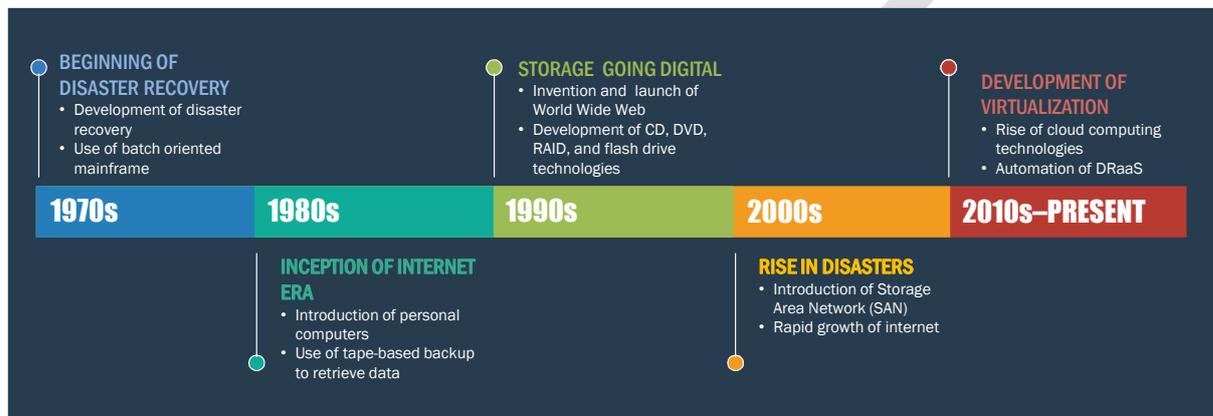
2 MARKET OVERVIEW

2.1 INTRODUCTION

The DRaaS market is expected to grow significantly with the increasing adoption rate of DRaaS across every vertical, globally. Increasing adoption rate among SMEs is one of the major drivers of this market. Organizations are deploying DRaaS as it is cost effective, flexible, automated, and simple to test and offers faster recovery of lost data. The DRaaS market is diversified and competitive with a large number of market players, such as AWS, IBM, Microsoft, SunGard AS, VMware, Cisco, and others.

2.2 MARKET EVOLUTION

FIGURE 3 THE EVOLUTION OF DISASTER RECOVERY AS A SERVICE MARKET



Source: Expert Interviews and MarketsandMarkets Analysis

Disaster recovery has come a long way since its inception and has undergone many changes to reach its current state. The rise in technological development has also led to increase in technological failures. In the 1970s, the majority of businesses operated on the paper model and thereby prone to loss due to disaster. The adoption of digital technologies such as storage and mobility made businesses more aware of potential disruption caused by technology and its downtime. Thus, 1970s saw the establishment of DR firms. The evolution of DRaaS started with the introduction of personal computers in the early 1980s. At that point of time, only backup and restore commands were available as a solution of DR. Into the late 1980s, the concept of networking capabilities, central computer, servers, and tape-based backup came into picture to retrieve the data in case of any disaster. However, these techniques were not adequate to support the businesses in case of any natural or manmade calamities. These methods were also expensive and time consuming and failed to provide any guarantee for recovering data loss.

During 1990s, the World Wide Web went live and things began developing rapidly for web. In 1993, it was announced that the World Wide Web was free for everyone to use and develop, a key factor in the transformational impact it had on the world. The Magneto-Optical disc emerged onto the information technology field. This optical disc format used a combination of optical and magnetic technologies to store and retrieve digital data. It was a drastic revolution in storage having advantages such as light weight and high capacity with low price which replaced the floppies storage system.

Over time, organizations realized the significant way downtime costs and data loss were affecting their business operations. This factor created a sense or need for effective disaster recovery among the SMEs and the large enterprises that could reduce the recovery time, costs, and complexities compared with the traditional recovery process. With the voluminous increase in data in early 2000s, evolution of data center storage took place. Storage Area Network (SAN) which applies a networking model for storage in data

center, evolved out of the need for fast and secure data access. Disasters such as the attack on the World Trade Center had an impact on the DR strategies both in the U.S. and rest of the world. Following the outage, businesses emphasized more on quick recovery and restoring the critical processes.

Virtualization has revolutionized data center and has been one of the biggest disrupting technologies since 2010. The concept of virtualization has bled over into storage and networking, providing cost savings, while enabling agility and scalability by effectively utilizing the server hardware. The rise of cloud computing has facilitated the businesses to outsource their DR plans, thereby providing a number of benefits such as reduced cost, recovery time, and flexibility. The DR service types such as backup as a service, security and compliance, hypervisor-based replication, and effective DR plan combined with proper support and maintenance and system integration has resulted in increased productivity and business continuity. Furthermore, enterprises can now opt for the pay-as-you-go pricing model, paying for only the amount of usage done further reducing the costs significantly.

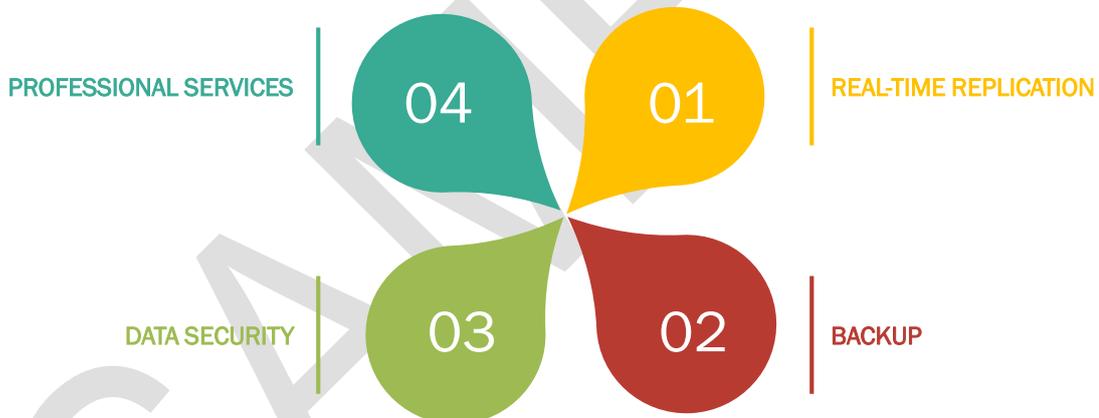
2.3 MARKET SEGMENTATION

The DRaaS market research report segments the global market on the basis of service types, providers, deployment models, organization size, verticals, and regions. It also forecasts the market size and analyzes the trends in each of the subsegments.

2.3.1 BY SERVICE TYPE

The DRaaS market on the basis of service type has been classified into the following categories.

FIGURE 4 DISASTER RECOVERY AS A SERVICE MARKET, BY SERVICE TYPE

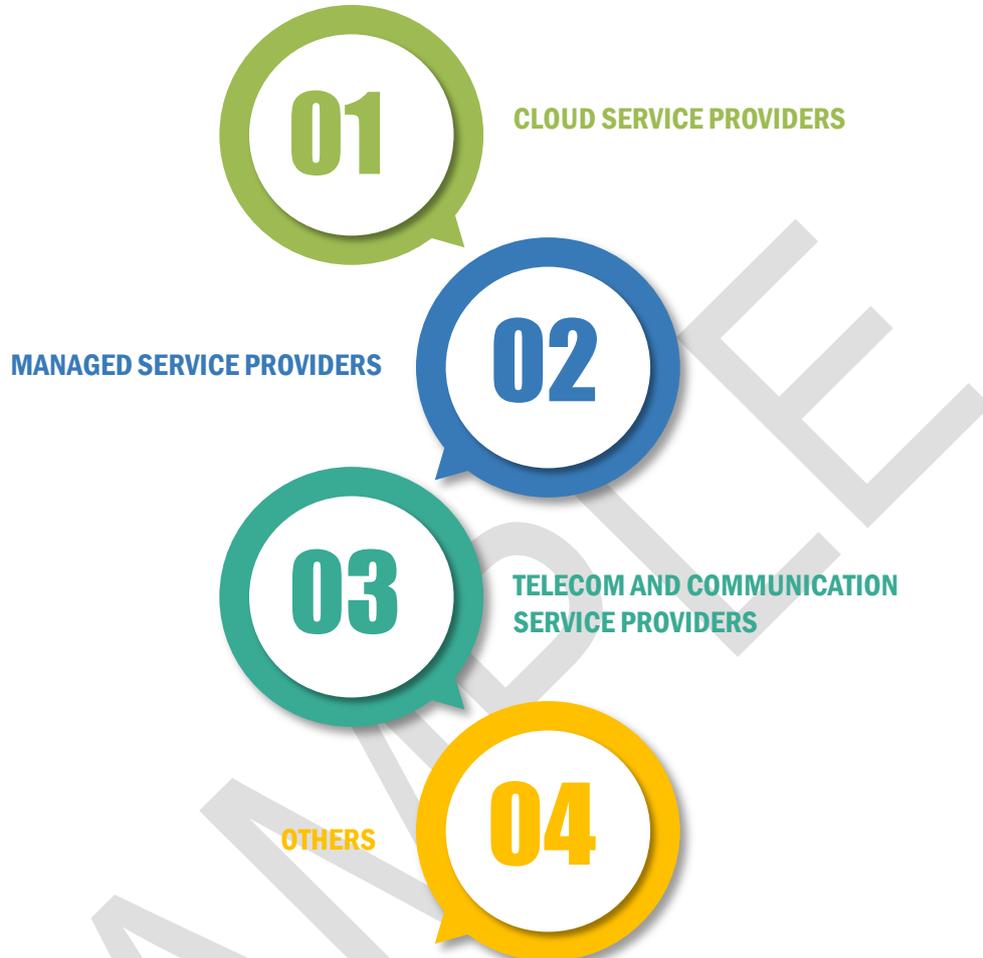


Source: Expert Interviews and MarketsandMarkets Analysis

2.3.2 BY PROVIDER

The DRaaS market on the basis of provider has been classified into the following categories.

FIGURE 5 DISASTER RECOVERY AS A SERVICE MARKET, BY PROVIDER



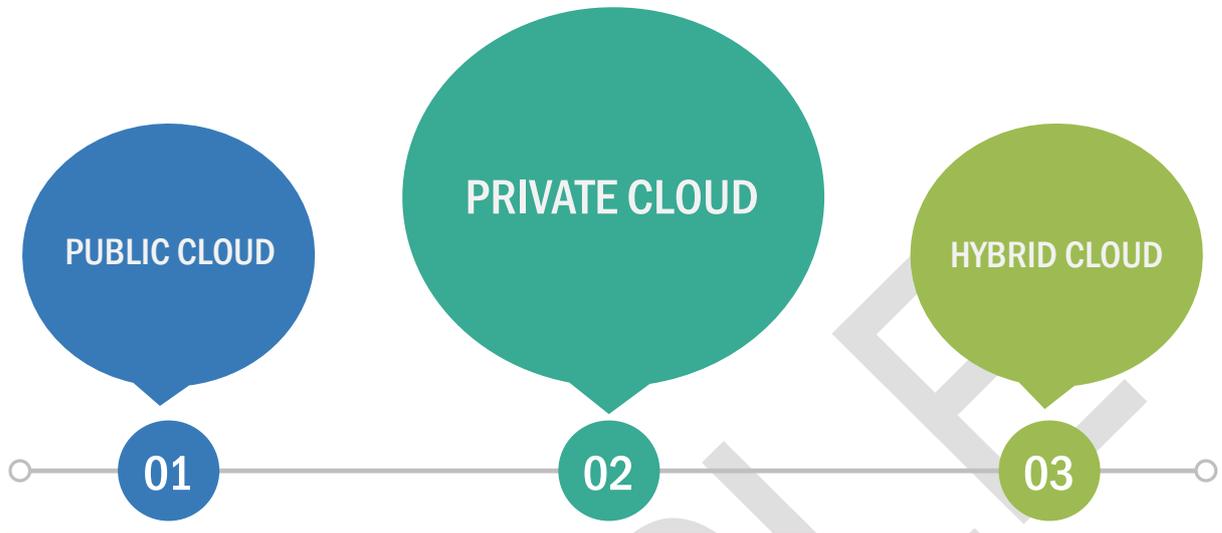
Note: The others provider includes disaster recovery service providers, ISVs, and technology providers & suppliers

Source: Expert Interviews and MarketsandMarkets Analysis

2.3.3 BY DEPLOYMENT MODEL

The DRaaS market on the basis of deployment model has been classified into the following categories.

FIGURE 6 DISASTER RECOVERY AS A SERVICE MARKET, BY DEPLOYMENT MODEL

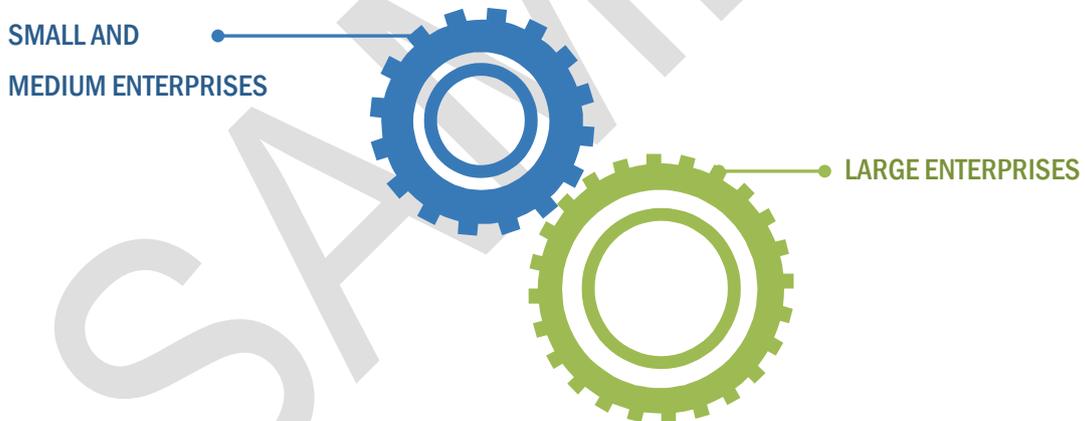


Source: Expert Interviews and MarketsandMarkets Analysis

2.3.4 BY ORGANIZATION SIZE

The DRaaS market on the basis of organization size has been classified into the following categories.

FIGURE 7 DISASTER RECOVERY AS A SERVICE MARKET, BY ORGANIZATION SIZE

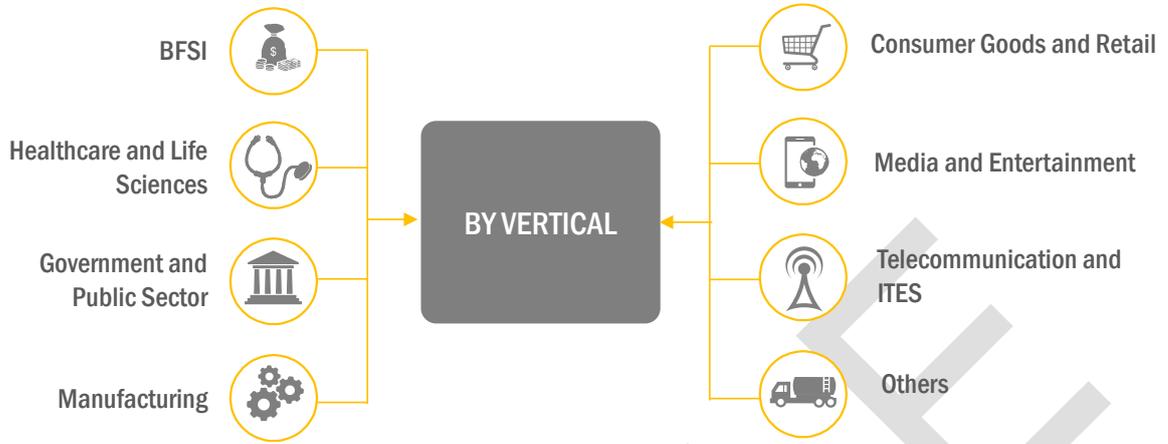


Source: Expert Interviews and MarketsandMarkets Analysis

2.3.5 BY VERTICAL

The DRaaS market on the basis of verticals has been classified into the following categories.

FIGURE 8 DISASTER RECOVERY AS A SERVICE MARKET, BY VERTICAL



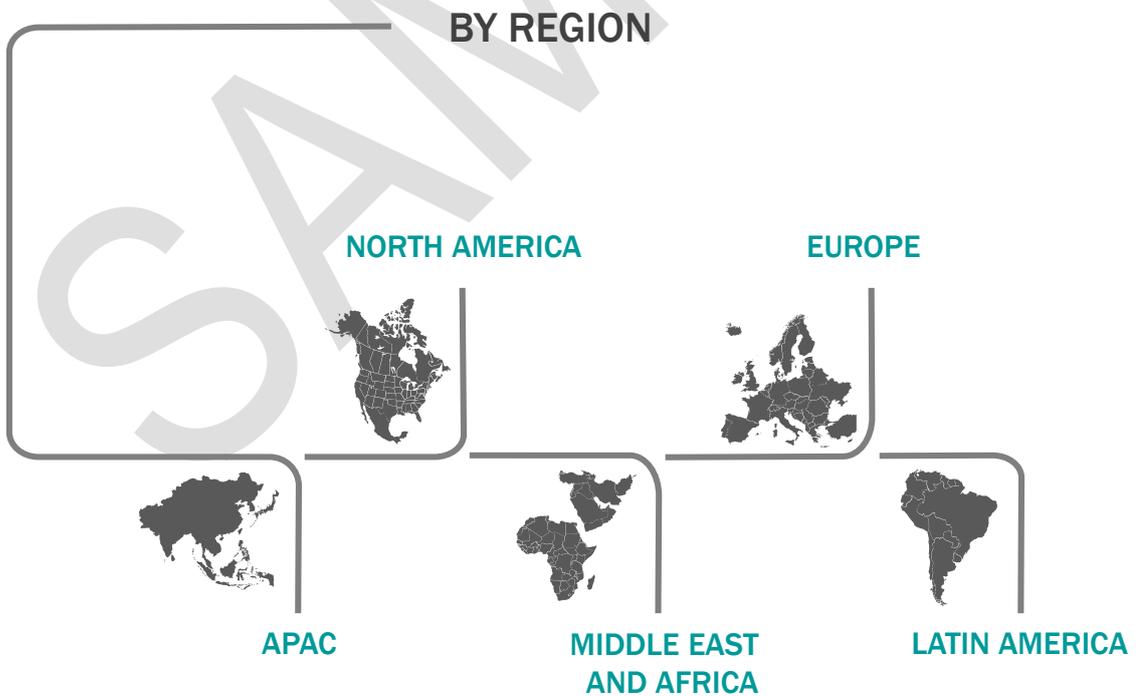
Note: The others vertical include transportation & logistics and travel & hospitality, education, oil & gas, e-commerce, and military & defense industries

Source: Expert Interviews and MarketsandMarkets Analysis

2.3.6 BY REGION

The DRaaS market on the basis of region has been classified into the following categories

FIGURE 9 DISASTER RECOVERY AS A SERVICE MARKET, BY REGION



Source: Expert Interviews and MarketsandMarkets Analysis

2.4 INNOVATION SPOTLIGHT

2.4.1 GEMINARE INCORPORATED

The Geminare's Resiliency Management Platform (RMP) easily represents the industry's most innovative, multi-tiered platform designed specifically to address the complexities identified by service providers when delivering and supporting DRaaS solutions and highlights Geminare's vast experience and deep market understanding in this area.

By enabling a cohesive platform where support personnel, customers, and service providers can collaborate on support, deployment, and management of their associated DR, DRaaS, and cloud technologies, the RMP drives very unique competitive business advantages for service providers and continues to place Geminare clearly among the Key Innovators in the DRaaS market.

Due to these unique advantages, we chose Geminare to be highlighted within the Innovators Spotlight.

KEY DRAAS SERVICE PROVIDER BENEFITS ACHIEVED THROUGH THE RMP

Significant Support Cost Savings

By pulling all data protection configurations, information, and controls into a single multi-tenant RMP, the number of support personnel required in a deployment and/or customer support scenario is greatly reduced as the support knowledge gap is minimized through the capabilities of the expanded toolset.

Broader Customer Engagement and Solution Suites

By embracing their customers' existing data protection technologies, service providers can quickly engage in customer opportunities without lengthy re-architecture or deployment model adjustments, and are able to offer a more diverse set of BC/DR capabilities by not locking into a single vendor solution.

True Hybrid Cloud Support

Service providers are no longer restricted by their customers' deployment locations. By enabling multiple technologies across a hybrid delivery model (i.e. across public, private, and hybrid clouds), the customer's deployment platform becomes flexible, which in turn enables service providers to deliver and manage technology in virtually any deployed configuration.

Advanced Automation and Orchestration

Sophisticated software defined orchestration within the RMP enables service providers to drive highly intelligent automation of diverse technology across a multitude of platforms. Enabling highly advanced automation of DR processes within a customer's environment leads to better and more successful DR outcomes.

2.4.2 TIERPOINT

Aiming to change the DRaaS market through an innovative Software Defined DRaaS approach, TierPoint invested, acquired, and partnered with leading vendors, technologies, and platforms to create one of the most advanced DRaaS programs in the market today. At the core of this DRaaS program is the company's ability to provide customers with flexible access to more than just one DR technology while simultaneously providing access across a hybrid delivery model (i.e. across public, private, and hybrid clouds).

Leveraging key technology relationships with Microsoft Azure, Geminare's RMP, and a host of other leading technology vendors, TierPoint architected its Software Defined DRaaS Program, to focus on three main pillars of innovation:

KEY PILLARS OF TIERPOINT'S SOFTWARE DEFINED DRAAS

| Hybrid Complexity | Managed Resilience | Software Defined Integration |
|---|---|---|
| Recognizing the hybrid complexity of deployed DR assets in the cloud as well as on-premises | Providing managed resilience across all DR assets (tools) and not just cloud based ones | Embracing software-defined technologies to enable users to integrate this complexity and access these DR assets effectively |

All three pillars are managed, monitored, and delivered by TierPoint's leading managed services team and together create a formidable player within the North American DRaaS market.

2.4.3 CABLE & WIRELESS BUSINESS SOLUTIONS

Cable & Wireless Business Solutions (C&W Business), a dominant DRaaS provider in Latin America and the Caribbean, has differentiated itself by focusing on innovating one of the most advanced hybrid DRaaS delivery and management capabilities in the market.

Capitalizing on its partnerships with IBM, Geminare, Citrix, Cisco, and a multitude of other leading vendors, C&W Business has built a platform with integrations into virtually all technology platforms in the market today including hypervisor support for Oracle VM, PowerVM (for the IBM i/OS and AIX operating systems), VMware vSphere, Hyper-V, and Xen. Further development has created unique DRaaS programs including IBM PowerSeries DRaaS and Oracle Replication DRaaS uniquely positioning C&W Business as the only DRaaS provider in the market offering this.

CABLE AND WIRELESS BUSINESS' HYBRID DRAAS PROGRAM

| Hypervisor Support | Unique Shared Delivery Models | Advanced Support Knowledge |
|---|---|--|
| Able to address virtually all combinations of hypervisor and operating systems deployed in the market | Creation of a shared service and technology model has made DRaaS programs unique in the market for IBM PowerSeries and Oracle Replication | Highly experienced support teams are able to deliver unique DR, network and deployment knowledge that leverage C&W's innovative DRaaS platform |

Combining technology, partnerships, and internal support knowledge, C&W Business has positioned itself as a key innovator within the DRaaS market and has uniquely aligned itself against its larger and more global competitors.

2.4.4 NTT COMMUNICATIONS

One of the very early service providers to launch a DRaaS program, NTT Communications has leveraged its global data center footprint, active investment and acquisition strategy, and multi-national delivery capability to remain an innovative leader in the DRaaS market. NTT Communications has consistently focused on key technologies, services, and partnerships, when combined represent real differentiators in the market.

Recognizing that innovation is a key business enabler for long-term success, NTT Communications has invested in expanding its data center footprint through acquisitions such as RangingWire, acquiring key technology footholds in the critical field of Software-Defined Networking (SDN) through its Virtela acquisition to the most recent creation of a stand-alone company NTT Communications Managed Services to deliver globally delivered managed services. NTT Com has recognized that Hybrid DRaaS is a customer requirement and has led the way through the development of a technology interconnect called Cloud Connect. This functionality enables customers to securely and directly connect to public cloud providers such as Azure and AWS from within NTT Communications's data centers and backbone.

Combining these investments and technology focuses has continued to put NTT Communications in the top tier of DRaaS providers, globally.

NTT COMMUNICATIONS' INNOVATIVE DRAAS INVESTMENT FOCUS

| Global Data Center Reach | Virtualized Networking | Managed Services Capabilities |
|---|---|--|
| Through expansive data center investment to Cloud Connect, which enables direct connections to public cloud platforms | Major investments in top-tier networking technology, a key underpinning of delivering and support for DRaaS | Differentiating its capabilities even further, NTT Com Managed Services is a leading provider of managed DRaaS services to all NTT's global entities |

3 DISASTER RECOVERY AS A SERVICE MARKET ANALYSIS, BY SERVICE TYPE

3.1 INTRODUCTION

The service types included in this study are real-time replication, backup, data security, and professional services. Real-time replication can be defined as the duplication of database from one computer or server to another, enabling end-users to avoid data ambiguity. Backup enables organization to restore applications and data in the event of crisis such as natural disaster, human error, and hardware failure. Data security safeguards an organization's data keeping in mind the regulatory compliance appropriate for specific businesses and verticals. Professional services provide enterprises with technical expertise to store and manage applications & data, overcome complex problems, and manage the operational challenges of the enterprises. Organizations are deploying DR services to overcome the loopholes of traditional disaster recovery systems. Moreover, low maintenance requirements and cost-effectiveness of the services are the other benefits driving the growth of the DRaaS market.

The table given below highlights the DRaaS market size on the basis of service types. The backup service type market size is expected to grow from USD XX million in 2016 to USD XX million by 2021, at a CAGR of XX%. The professional services segment is expected to grow from USD XX million in 2016 to USD XX million by 2021, at a CAGR of XX%.

TABLE 2 DISASTER RECOVERY AS A SERVICE MARKET SIZE, BY SERVICE TYPE, 2014-2021 (USD MILLION)

| Service Type | 2014 | 2015 | 2016-e | 2021-p | CAGR (2016-2021) |
|-----------------------|------|------|--------|--------|------------------|
| Backup | XX | XX | XX | XX | XX |
| Real-Time Replication | XX | XX | XX | XX | XX |
| Data Security | XX | XX | XX | XX | XX |
| Professional Services | XX | XX | XX | XX | XX |
| Total | XX | XX | XX | XX | XX |

Source: Press Releases, Investor Presentations, Expert Interviews, and MarketsandMarkets Analysis

FIGURE 10 BACKUP SERVICE TYPE IS EXPECTED TO HAVE THE LARGEST MARKET SIZE IN 2016



Source: Press Releases, Investor Presentations, Expert Interviews, and MarketsandMarkets Analysis

3.2 REAL-TIME REPLICATION

Real-time replication refers to continuous duplication of data from client's server to a remote server which enables business continuity in the event of catastrophe. The hypervisor-based replication technology automatically creates and maintains replicas of virtual hard disks or entire virtual machines. This service type provides numerous benefits such as faster RTO and RPO, granularity, scalability, and ease of management. Enterprises need faster RTO and lower RPO as it ensures business continuity at all times. BFSI is one of the major beneficiaries of real-time replication owing to the voluminous data stored in the cloud. This duplicated data is accessible globally which helps enterprises in avoiding downtime in the event of disaster. DRaaS services help companies mitigate the risk exposure through automatic replication of data providing reliability, scalability, and cost optimization. The major vendors offering real-time replication to the end users, SMEs, and large enterprises include Microsoft, VMware, HPE, and Zerto.

The table given below highlights the real-time replication market size on the basis of verticals. The BFSI vertical is estimated to grow from USD XX million in 2016 to USD XX million by 2021, at a CAGR of XX% during the forecast period.

TABLE 3 REAL-TIME REPLICATION: DISASTER RECOVERY AS A SERVICE MARKET SIZE, BY VERTICAL, 2014-2021 (USD MILLION)

| Vertical | 2014 | 2015 | 2016-e | 2021-p | CAGR (2016-2021) |
|-------------------------------------|------|------|--------|--------|------------------|
| BFSI | XX | XX | XX | XX | XX |
| Consumer Goods and Retail | XX | XX | XX | XX | XX |
| Government and Public Sector | XX | XX | XX | XX | XX |
| Healthcare and Life Sciences | XX | XX | XX | XX | XX |
| Manufacturing | XX | XX | XX | XX | XX |
| Media and Entertainment | XX | XX | XX | XX | XX |
| Telecommunication and ITES | XX | XX | XX | XX | XX |
| Others | XX | XX | XX | XX | XX |
| Total | XX | XX | XX | XX | XX |

Source: Press Releases, Investor Presentations, Expert Interviews, and MarketsandMarkets Analysis

4 DISASTER RECOVERY AS A SERVICE MARKET ANALYSIS, BY PROVIDER

4.1 INTRODUCTION

DR services are delivered across major verticals through different vendors that are grouped under specific category of providers. All these type of providers have their own expertise and process in providing DR services to organizations. Enterprises face various challenges while setting up DRaaS service type such as lack of technical expertise, low budget, and minimal level of CAPEX and OPEX; hence, providers offer specialized service type to overcome these challenges.

There are three types of providers that deliver DRaaS service type to enterprises. They are CSPs, MSPs, and telecom and communication service providers. These providers help enterprises in reducing the costs, increasing the overall revenue, and improving the performance. The market size of providers has also been discussed in detail in this chapter.

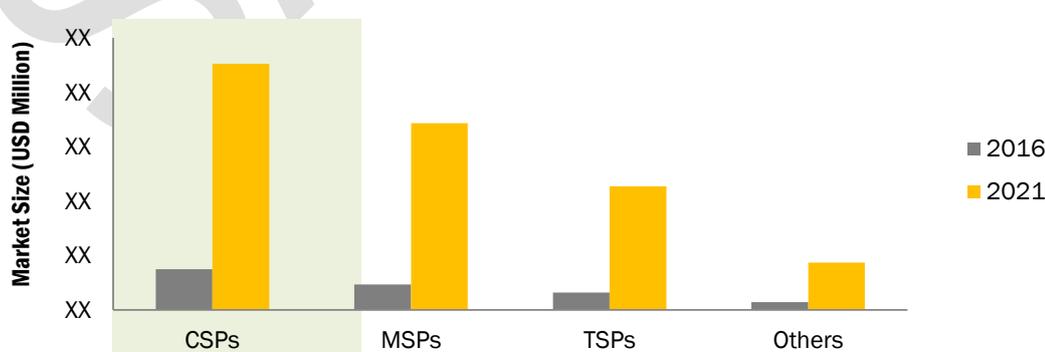
The table and figure given below highlight the DRaaS market size on the basis of providers. The CSP segment is expected to grow from USD XX million in 2016 to USD XX million by 2021, at a CAGR of XX%. The MSP segment is expected to grow from USD XX million in 2016 to USD XX million by 2021, at a CAGR of XX%.

TABLE 4 DISASTER RECOVERY AS A SERVICE MARKET SIZE, BY PROVIDER, 2014-2021 (USD MILLION)

| Provider | 2014 | 2015 | 2016-e | 2021-p | CAGR (2016-2021) |
|--|------|------|--------|--------|------------------|
| CSP | XX | XX | XX | XX | XX |
| MSP | XX | XX | XX | XX | XX |
| Telecom and Communication Service Provider | XX | XX | XX | XX | XX |
| Others | XX | XX | XX | XX | XX |
| Total | XX | XX | XX | XX | XX |

Source: Press Releases, Investor Presentations, Expert Interviews, and MarketsandMarkets Analysis

FIGURE 11 CLOUD SERVICE PROVIDER SEGMENT IS EXPECTED TO HOLD THE LARGEST MARKET SIZE IN 2016



Source: Press Releases, Investor Presentations, Expert Interviews, and MarketsandMarkets Analysis

5 DISASTER RECOVERY AS A SERVICE MARKET ANALYSIS, BY DEPLOYMENT MODEL

5.1 INTRODUCTION

In this chapter, the DRaaS market has been segmented on the basis of deployment models into public cloud, private cloud, and hybrid cloud. End-users select the most appropriate deployment model depending upon various parameters, such as cost, flexibility, scalability, and security & compliance. Private cloud offers high-end performance and greater security but is comparatively expensive than public and hybrid cloud. On the other hand, public and hybrid cloud are highly scalable, flexible, and cost-efficient as compared to private cloud. Enterprises have a rising need for agility, flexibility, safety, reliability, interoperability, and reduced cost; hence, it is necessary to choose the deployment model as per the size of the organization and business requirements.

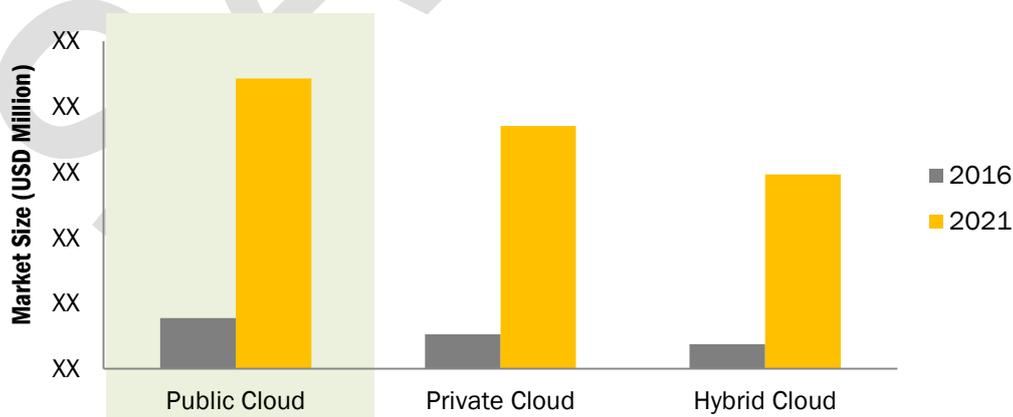
The table and figure given below highlight the DRaaS market size on the basis of deployment models. The public cloud segment is expected to grow from USD XX million in 2016 to USD XX million by 2021, at a CAGR of XX%. The hybrid cloud segment is expected to grow at the highest CAGR of XX% during the forecast period.

TABLE 5 DISASTER RECOVERY AS A SERVICE MARKET SIZE, BY DEPLOYMENT MODEL, 2014-2021 (USD MILLION)

| Deployment Model | 2014 | 2015 | 2016-e | 2021-p | CAGR (2016-2021) |
|------------------|------|------|--------|--------|------------------|
| Public Cloud | XX | XX | XX | XX | XX |
| Private Cloud | XX | XX | XX | XX | XX |
| Hybrid Cloud | XX | XX | XX | XX | XX |
| Total | XX | XX | XX | XX | XX |

Source: Press Releases, Investor Presentations, Expert Interviews, and MarketsandMarkets Analysis

FIGURE 12 PUBLIC CLOUD MODEL IS EXPECTED TO HOLD THE LARGEST MARKET SIZE IN 2016



Source: Secondary literature, Expert Interviews, and MarketsandMarkets Analysis

6 DISASTER RECOVERY AS A SERVICE MARKET ANALYSIS, BY ORGANIZATION SIZE

6.1 INTRODUCTION

This chapter includes the segmentation of the DRaaS market on the basis of organization size or end users, namely, SMEs and large enterprises. The study of the DRaaS market in terms of organization size is important as it has a direct impact on the adoption of DR services across the globe. Moreover, the adoption of the DR services is increasing for SMEs which is acting as one of the major driving factors in the DRaaS market; whereas, the adoption rate of DR services in large businesses is reaching maturity as compared to SMEs. Thus, there is a need for innovation in the DRaaS market. The large enterprises segment is expected to hold the largest share in the market due to affordability and high demand for advanced technologies in organizations.

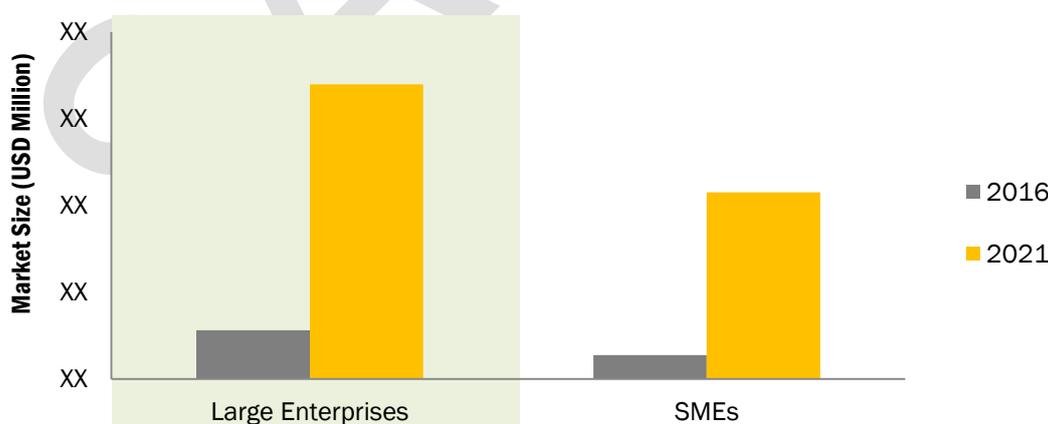
The table and figure given below highlight the DRaaS market size on the basis of organization size. The large enterprises segment is expected to grow from USD XX million in 2016 to USD XX million by 2021, at a CAGR of XX%. The SMEs segment is expected to grow at the highest CAGR of XX% during the forecast period.

TABLE 6 DISASTER RECOVERY AS A SERVICE MARKET SIZE, BY ORGANIZATION SIZE, 2014-2021 (USD MILLION)

| Organization Size | 2014 | 2015 | 2016-e | 2021-p | CAGR (2016-2021) |
|-------------------|------|------|--------|--------|------------------|
| Large Enterprises | XX | XX | XX | XX | XX |
| SMEs | XX | XX | XX | XX | XX |
| Total | XX | XX | XX | XX | XX |

Source: Press Releases, Investor Presentations, Expert Interviews, and MarketsandMarkets Analysis

FIGURE 13 LARGE ENTERPRISES SEGMENT IS EXPECTED TO HOLD THE LARGEST MARKET SIZE IN 2016



Source: Secondary literature, Expert Interviews, and MarketsandMarkets Analysis

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