

# Data Recovery Buyers Guide

Software Provider and Product Assessment

EXECUTIVE  
SUMMARY

**\*iSG** Research



# Data Recovery

Chief Information Officers (CIOs), Chief Information Security Officers (CISOs) and Information Security (InfoSec) leaders face an ever-evolving cyber threat reality. As businesses rely more on digital infrastructures, the urgency to protect sensitive data and ensure operational integrity grows. A strategic approach that blends innovation with effective management of security technologies is essential. Utilizing advanced cybersecurity software tools is crucial for countering emerging threats and fortifying defenses against diverse cyber risks. Enterprises must grasp the capabilities and intricacies of these tools to safeguard valuable assets, enhance compliance and reduce security breaches. Data breaches can inflict significant financial and reputational damage, making proactive measures and incident response protocols vital for effective defense and recovery. This Buyers Guide offers insights to help enterprise security leaders make informed decisions on selecting and deploying critical cybersecurity technologies, ultimately improving their security posture and fostering a safer digital environment.

ISG Research defines data recovery as a critical component of modern data management strategies, aimed at helping enterprises manage data effectively while keeping it secure. In an era where data is one of the most valuable assets, robust data recovery strategies are essential for ensuring data protection and resilience against various threats, including

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**Effective data recovery software incorporates continuous data protection techniques which enable real-time backup of data as changes occur.**

cyberattacks, accidental deletions and hardware failures. These approaches provide enterprises with the ability to restore lost or corrupted data quickly, minimizing downtime and maintaining operational integrity.

Effective data recovery software incorporates continuous data protection techniques which enable real-time backup of data as changes occur. This approach allows enterprises to recover data to specific points in time, reducing the risk of data loss and enhancing business continuity. With features such as automated backup processes, snapshot recovery and cryptographic security measures, modern data management becomes more robust, safeguarding sensitive information from unauthorized access and ransomware attacks.

Data recovery strategies also facilitate compliance with regulatory requirements related to data protection, ensuring that enterprises safeguard critical information while remaining resilient in the face of potential crises. By integrating effective data recovery practices, enterprises can enhance their overall data governance framework, ensuring not only the quick restoration of lost data but also a proactive approach to securing and managing information



assets. Ultimately, a comprehensive data recovery strategy is vital for empowering enterprises to stand strong against data incidents, ensuring continuity and resilience.

ISG asserts that by 2027, 3 in 4 enterprises will adopt a backup and recovery program enabling continuous data protection to maintain operational resilience and comply with regulations, mitigating potential crises.

A data recovery program is a vital component of an enterprise's cybersecurity strategy, directly supporting business goals by ensuring data integrity and availability. In an era where data is a key asset for decision-making and operational efficiency, safeguarding against data loss is paramount. Effective data recovery approaches enable enterprises to restore lost or corrupted data promptly, minimizing downtime and ensuring business continuity. In doing so, they help protect the enterprise against the financial and reputational consequences of data breaches or loss incidents.

**Cybersecurity**  
Market Assertion

By 2027, 3 in 4 enterprises will adopt a backup and recovery program enabling continuous data protection to maintain operational resilience and comply with regulations, mitigating potential crises.

Jeff Orr  
Director of Research, Technology Research

**ISG** Research

The graphic is a dark blue rectangular box with a light blue border. It features the title 'Cybersecurity' in large white font, followed by 'Market Assertion' in a smaller white font. The main text is a white paragraph stating the market assertion. Below the text is a circular portrait of Jeff Orr, a man with glasses and a blue shirt. To the left of the portrait, his name 'Jeff Orr' and title 'Director of Research, Technology Research' are written in white. At the bottom left of the box is the 'ISG Research' logo in white.

Continuous data protection mechanisms allow enterprises to back up data in real time, reducing the risk of significant data loss and enhancing resilience. This capability enables enterprises to adhere to regulatory requirements related to data protection, thereby fostering trust among clients and stakeholders. Additionally, data recovery approaches empower enterprises to implement robust disaster recovery plans, simulating various scenarios to prepare for potential crises effectively. By ensuring rapid recovery from data loss incidents, enterprises can sustain operations without significant interruptions.

Furthermore, data recovery tools often incorporate advanced features such as data integrity checks and encryption, ensuring that recovered data is secure and reliable. This focus on data security aligns with broader enterprise objectives related to risk management and operational excellence. Ultimately, a comprehensive data recovery strategy enhances the overall security posture of the enterprise while supporting its goals of resilience, compliance and trust.

Generative AI (GenAI) is transforming enterprise cybersecurity software by automating complex processes and enhancing decision-making. By leveraging GenAI, enterprises can streamline threat detection, optimize resource allocation and proactively identify vulnerabilities, leading to improved operational performance. Additionally, GenAI enables teams to extract valuable insights from extensive data, fostering informed strategic planning and collaboration. As enterprises navigate digital transformation, integrating cybersecurity software with GenAI capabilities becomes crucial for maintaining a competitive edge and enhancing organizational resilience.



GenAI can enhance productivity and efficiency using data backup and recovery software by automating backup processes, improving data loss prevention strategies and optimizing recovery operations. AI algorithms can predict potential hardware failures and automate the scheduling of backups, ensuring that critical data is consistently protected. By analyzing patterns of data access and usage, GenAI can identify sensitive data that requires additional protection and streamline the recovery process by prioritizing critical assets. In the event of data loss, AI can accelerate recovery actions by generating recommendations for restoration steps based on the specific circumstances of the incident. Additionally, GenAI can help in creating and optimizing disaster recovery plans by simulating various scenarios, thereby empowering security personnel to act swiftly and effectively, minimizing downtime and enhancing data resilience.

Looking towards the future, the incorporation of agentic AI functionalities into data backup and recovery software has the potential to transform data management practices. In this envisioned future, agentic AI could autonomously evaluate the overall health of IT

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**Agentic AI could autonomously evaluate the overall health of IT infrastructure, detecting anomalies and potential risks before they lead to data loss.**

infrastructure, detecting anomalies and potential risks before they lead to data loss. It could actively manage backup schedules based on real-time analysis of data usage and system performance, optimizing the backup process without waiting for manual intervention. Moreover, in the event of a disaster, agentic AI might independently execute recovery processes, making decisions on data restoration priorities and performing the necessary actions to mitigate downtime. This evolution would not only streamline and enhance the resilience of data management practices but also empower enterprises to safeguard their critical information.

CIOs and security leaders should approach cybersecurity software incorporating GenAI, large language models (LLMs) and future agentic AI

capabilities with enthusiasm and caution. While these technologies offer significant benefits, they also come with unique challenges and prerequisites. A holistic evaluation must include technical aspects and business, ethical and strategic considerations. Other areas of focus include risk awareness, critical infrastructure, organizational readiness, governance and compliance, and a long-term perspective on the sustainability and scalability of AI approaches.

Our Cybersecurity Buyers Guide research is designed to provide a comprehensive view of a software provider's capability to enhance the effectiveness, performance and governance of cybersecurity measures within an enterprise. Separate Buyers Guide research reports are available for SIEM, IAM and EDR software.



ISG believes a methodical approach is essential to maximize competitiveness. It is critical to select the right software provider and product to improve the performance of your enterprise's people, process, information and technology components.

The insights gained from understanding current cybersecurity software providers are invaluable for enterprise CIOs, CISOs and VPs of InfoSec who aim to align their technology investments with organizational goals, enhance security workflows and cultivate a culture of resilience. By investing in the right cybersecurity tools, these leaders can unlock new avenues for protection and transformation, positioning their enterprises to thrive.

The ISG Buyers Guide™ for Data Recovery evaluates products based on a variety of capabilities, including backup management, compliance and data integrity, continuous data protection, data segmentation, GenAI and machine learning (ML), recovery speed and the opportunity to evolve into a managed service at a later time. To be included in this Buyers Guide, software providers must meet or exceed the inclusion criteria and have commercially available products.

This research evaluates the following software providers that offer products addressing key elements of data backup and recovery: Acronis, Arcserve, AvePoint, AWS, Cohesity, Commvault, Dell, Druva, HPE, IBM, Microsoft, N-able, NinjaOne, OpenText, Quest, Rubrik and Veeam.





## Buyers Guide Overview

For over two decades, ISG Research has conducted market research in a spectrum of areas across business applications, tools and technologies. We have designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of the business requirements in any enterprise. Utilization of our research



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methodology and decades of experience enables our Buyers Guide to be an effective method to assess and select software providers and products. The findings of this research undertaking contribute to our comprehensive approach to rating software providers in a manner that is based on the assessments completed by an enterprise.

The ISG Buyers Guide™ for Data Recovery is the distillation of over a year of market and product research efforts. It is an assessment of how well software providers' offerings address enterprises' requirements for data recovery software. The index is structured to support a request for information (RFI) that could be used in the request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. An effective product and customer experience with a provider can ensure the best long-term relationship and value achieved from a resource and financial investment.

In this Buyers Guide, ISG Research evaluates the software in seven key categories that are weighted to reflect buyers' needs based on our expertise and research. Five are product-experience related: Adaptability, Capability, Manageability, Reliability, and Usability. In addition, we consider two customer-experience categories: Validation, and Total Cost of Ownership/Return on Investment (TCO/ROI). To assess functionality, one of the components of Capability, we applied the ISG Research Value Index methodology and blueprint, which links the personas and processes for data recovery to an enterprise's requirements.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of data recovery technology can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its full performance potential. In addition, this approach can reduce the project's development and deployment



time and eliminate the risk of relying on a short list of software providers that does not represent a best fit for your enterprise.

ISG Research believes that an objective review of software providers and products is a critical business strategy for the adoption and implementation of data recovery software and applications. An enterprise's review should include a thorough analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating data recovery systems and tools and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.



# How To Use This Buyers Guide

## Evaluating Software Providers: The Process

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes.

1. Define the business case and goals.  
Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. Specify the business needs.  
Defining the business requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. Assess the required roles and responsibilities.  
Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. Outline the project's critical path.  
What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.
5. Ascertain the technology approach.  
Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. Establish software provider evaluation criteria.  
Utilize the product experience: Adaptability, Capability, Manageability, Reliability and Usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the technology properly.  
Weight the categories in the technology evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.
8. Establish the business initiative team to start the project.  
Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.





## The Findings

All of the products we evaluated are feature-rich, but not all the capabilities offered by a software provider are equally valuable to types of workers or support everything needed to manage products on a continuous basis. Moreover, the existence of too many capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a larger number of features in the product is a plus, especially if some of them match your enterprise's established practices or support an initiative that is driving the purchase of new software.

Factors beyond features and functions or software provider assessments may become a deciding factor. For example, an enterprise may face budget constraints such that the TCO evaluation can tip the balance to one provider or another. This is where the Value Index methodology and the appropriate category weighting can be applied to determine the best fit of software providers and products to your specific needs.

### Overall Scoring of Software Providers Across Categories

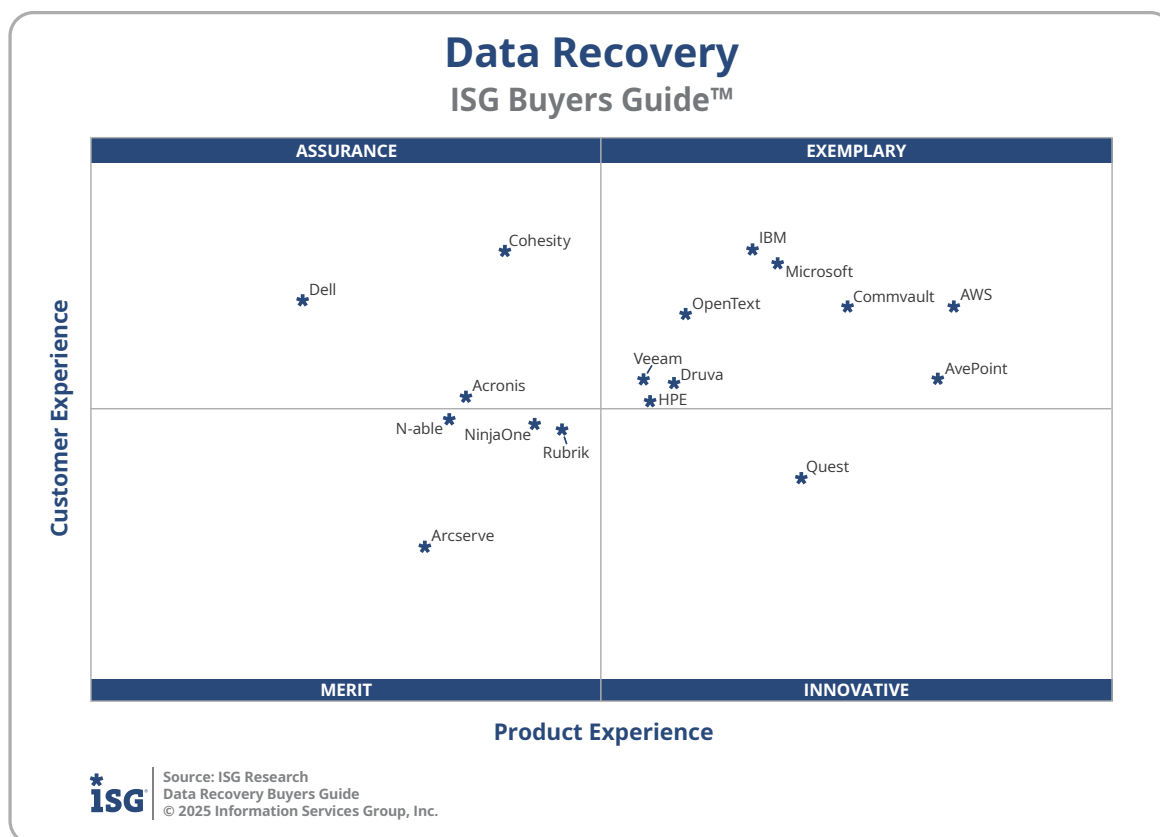
The research finds AWS atop the list, followed by Microsoft and IBM. Providers that place in the top three of a category earn the designation of Leader. Microsoft and IBM have done so in six categories; AWS has done so in four; Cohesity in two; and AvePoint, Commvault and Druva in one.

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the x and y axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have a higher weighted performance to the axis in aggregate of the five product categories place farther to the right, while the performance and weighting for the two Customer Experience categories determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

Data Recovery		
Overall		
Providers	Grade	Performance
AWS	B	<b>Leader</b> 68.3%
Microsoft	B	<b>Leader</b> 65.9%
IBM	B	<b>Leader</b> 65.9%
Commvault	B	63.4%
AvePoint	B	63.1%
OpenText	B-	61.8%
Quest	B-	61.1%
Veeam	B-	58.8%
Druva	B-	58.3%
HPE	B-	58.2%
Cohesity	B-	58.0%
NinjaOne	B-	57.3%
Rubrik	B-	56.4%
Dell	C++	56.0%
N-able	C++	55.9%
Acronis	C++	54.7%
Arcserve	C++	52.4%

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The research places software providers into one of four overall categories: Assurance, Exemplary, Merit or Innovative. This representation classifies providers' overall weighted performance.



**Exemplary:** The categorization and placement of software providers in Exemplary (upper right) represent those that performed the best in meeting the overall Product and Customer Experience requirements. The providers rated Exemplary are: AvePoint, AWS, Commvault, Druva, HPE, IBM, Microsoft, OpenText and Veeam.

**Innovative:** The categorization and placement of software providers in Innovative (lower right) represent those that performed the best in meeting the overall Product Experience requirements but did not achieve the highest levels of requirements in Customer Experience. The provider rated Innovative is: Quest.

**Assurance:** The categorization and placement of software providers in Assurance (upper left) represent those that achieved the highest levels in the overall Customer Experience requirements but did not achieve the highest levels of Product Experience. The providers rated Assurance are: Acronis, Cohesity and Dell.

**Merit:** The categorization of software providers in Merit (lower left) represents those that did not reach the rating of Assurance, Exemplary or Innovative ratings in Customer or Product Experience or surpass the threshold for the other three categories. The providers rated Merit are: Arcserve, N-able, NinjaOne and Rubrik.

We warn that close provider placement proximity should not be taken to imply that the packages evaluated are functionally identical or equally well suited for use by every enterprise



or for a specific process. Although there is a high degree of commonality in how enterprises handle data recovery, there are many idiosyncrasies and differences in how they do these functions that can make one software provider's offering a better fit than another's for a particular enterprise's needs.

We advise enterprises to assess and evaluate software providers based on organizational requirements and use this research as a supplement to internal evaluation of a provider and products.



## Product Experience

The process of researching products to address an enterprise's needs should be comprehensive. Our Value Index methodology examines Product Experience and how it aligns with an enterprise's life cycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future, which are flawed since they do not represent an enterprise's requirements but how the provider operates. As more software providers orient to a complete product experience, evaluations will be more robust.

The research results in Product Experience are ranked at 80%, or four-fifths, of the overall rating using the specific underlying weighted category performance. Importance was placed on the categories as follows: Usability (9%), Capability (45%), Reliability (9%), Adaptability (8%) and Manageability (9%). This weighting impacted the resulting overall ratings in this research. AWS, AvePoint and Commvault were designated Product Experience Leaders.

### Data Recovery Product Experience

Providers	Grade	Performance
AWS	B	<b>Leader</b> 51.4%
AvePoint	B	<b>Leader</b> 51.3%
Commvault	B-	<b>Leader</b> 49.2%
Quest	B-	48.1%
Microsoft	B-	47.3%
IBM	B-	46.9%
OpenText	B-	45.7%
Druva	B-	45.6%
HPE	B-	45.1%
Veeam	C++	45.0%
Rubrik	C++	43.1%
NinjaOne	C++	42.6%
Cohesity	C++	41.6%
Acronis	C++	40.9%
N-able	C++	40.6%
Arcserve	C++	40.4%
Dell	C+	37.6%



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## Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The advancement of Customer Experience and the entire life cycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. Technology providers that have chief customer officers are more likely to have greater investments in customer relationships and focus more on their success. These leaders also need to take responsibility for ensuring this commitment is made abundantly clear on the website and in the buying process and customer journey.

The research results in Customer Experience are ranked at 20%, or one-fifth, using the specific underlying weighted category performance as it relates to the framework of commitment and value to the software provider-customer relationship. The two evaluation categories are Validation (10%) and TCO/ROI (10%), which are weighted to represent their importance to the overall research.

The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are IBM, Cohesity and Microsoft. These category leaders best communicate commitment and dedication to customer needs.

Software providers that did not perform well in this category were unable to provide sufficient customer case studies to demonstrate success or articulate their commitment to customer experience and an enterprise's journey. The selection of a software provider means a continuous investment by the enterprise, so a holistic evaluation must include examination of how they support their customer experience.

### Data Recovery Customer Experience

Providers	Grade	Performance
IBM	B++	<b>Leader</b> 15.3%
Cohesity	B++	<b>Leader</b> 15.1%
Microsoft	B+	<b>Leader</b> 15.0%
Dell	B+	14.6%
Commvault	B+	14.6%
AWS	B+	14.5%
OpenText	B+	14.3%
Veeam	B	13.4%
AvePoint	B	13.4%
Druva	B	13.3%
Acronis	B	13.2%
HPE	B	13.1%
N-able	B	12.8%
NinjaOne	B	12.7%
Rubrik	B	12.7%
Quest	B-	11.9%
Arcserve	C++	11.2%



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## Appendix: Software Provider Inclusion

For inclusion in the ISG Buyers Guide™ for Data Recovery in 2025, a software provider must be in good standing financially and ethically, have at least \$100 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents and have at least 100 workers. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the past 18 months.

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider's website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant data recovery products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a significant impact on classification and ratings, we recommend additional scrutiny when evaluating those providers.





## Products Evaluated

Provider	Product Names	Version	Release Month/Year
Acronis	Acronis Cyber Protect Enterprise Backup & Recovery	N/A	February 2025
Arcserve	Arcserve Unified Data Protection	10.1	May 2025
AvePoint	AvePoint Resilience Suite for Cybersecurity	April Update	April 2025
AWS	AWS Backup	N/A	January 2025
Cohesity	Cohesity DataProtect	N/A	February 2025
Cohesity	Veritas NetBackup	10.5.0.1	March 2025
Commvault	Commvault Backup & Recovery	11.40	June 2025
Dell	Data Protection Suite	N/A	March 2025
Druva	Druva Data Security Cloud	N/A	May 2025
HPE	HPE Zerto	10.0_U6P1	March 2025
IBM	IBM Storage Protect	8.1.26	March 2025
Microsoft	Azure Backup	N/A	March 2025
N-able	Cove Data Protection	25.3	March 2025
NinjaOne	NinjaOne Backup	8.0	February 2025
OpenText	OpenText Recover	25.1	March 2025
Quest	Rapid Recovery	6.10	March 2025
Rubrik	Security Cloud	March Update	March 2025
Veeam	Veeam Backup & Replication	12.3.1	March 2025



## Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the criteria for inclusion in this Buyers Guide. These are listed below as “Providers of Promise.”

<b>Provider</b>	<b>Product</b>	<b>Revenue &gt; \$100 Million</b>	<b>100+ Employees</b>
Asigra	Asigra SaaSAssure	No	No
Bacula Systems	Bacula Enterprise	No	Yes
HYCU	HYCU R-Cloud	No	Yes
IDrive	IDrive Server Cloud Backup	No	Yes
NAKIVO	NAKIVO Backup & Replication	No	Yes
SEP	SEP sesam	No	No



## About ISG Software Research and Advisory

ISG Software Research and Advisory provides market research and coverage of the technology industry, informing enterprises, software and service providers, and investment firms. The ISG Buyers Guides provide insight on software categories and providers that can be used in the RFI/RFP process to assess, evaluate and select software providers.

## About ISG Research

ISG Research provides subscription research, advisory, consulting and executive event services focused on market trends and disruptive technologies. ISG Research delivers guidance that helps businesses accelerate growth and create more value. For further information about ISG Research subscriptions, please visit [research.isg-one.com](https://research.isg-one.com).

## About ISG

ISG (Nasdaq: [III](#)) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth. The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.