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RESEARCH REPORT

Evaluation of Business
Continuity Services in the
U.S. 1997



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Evaluation of Business Continuity Services in the U.S. 1997

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Abstract

Business continuity services (BCS) encompass more than just disaster recovery (DR) services. As logical threats pose an increasing risk to mission critical business processes, BCS offerings typically include proactive elements which seek to prevent the occurrence of logical disasters.

INPUT research reveals that today's U.S. businesses do not perceive physical threats such as floods and fires to be the main threats to the continuity of their business activities. Logical threats such as data security and hardware and software failure are now perceived to be the major threats to business activities.

Nevertheless, the BCS market is worth \$1.4 billion in the United States and will be worth \$3.2 billion by 2002, growing at 18% CAGR.

This report analyses the BCS business and contains information which:

- Helps vendors to understand the dynamics affecting the BCS market
- Reveals ways in which vendors can enjoy continued success in the BCS market
- Equips BCS vendors with information relating to user attitudes towards business continuity services
- Reveals how BCS users perceive BCS vendors.

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Customer Services & Support

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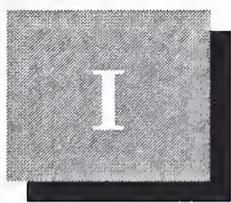
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Introduction

A

Objectives And Scope

Business continuity services (BCS) encompass more than just disaster recovery (DR) services. As logical threats pose an increasing risk to mission critical business processes, BCS offerings typically include proactive elements, which seek to prevent the occurrence of logical disasters.

INPUT research reveals that today's U.S. businesses do not perceive physical threats such as floods and fires to be the main threats to the continuity of their business activities. Logical threats such as data security and hardware and software failure are now perceived to be the major threats to business activities.

The BCS market is worth \$1.4 billion in the United States and will be worth \$3.2 billion by 2002, growing at 18% CAGR.

This study will:

- Help vendors to understand the dynamics affecting the BCS market
- Reveal ways in which vendors can enjoy continued success in the BCS market
- Equip BCS vendors with information relating to user attitudes towards business continuity services
- Reveal how BCS users perceive BCS vendors.

B**Definitions**

INPUT defines business continuity services as services which are designed to protect business critical activities underpinned by IT from interruptions caused by unexpected incidents either by providing the necessary facilities to continue those activities in the event of a major incident or by preventing the disruption of mission critical activities in the first place. BCS can be split into two types: disaster recovery (DR) services and proactive business continuity services.

DR services include a number of services elements that keep a business running in the event of a major incident which temporarily puts its operations completely out of action. Service types include backup services, restart services and the provision of standby sites.

Proactive business continuity services are those which seek to prevent disruptive incidents from taking place or enable users to deal with the consequences of disruptive incidents more effectively. Typical service types include remote management services and contingency planning.

INPUT defines standby sites as follows:

Exhibit I-1

Standby Site Definitions

- A cold standby site is an alternative site, minus computer hardware or office facilities, available for long term use
- A warm standby site is an alternative recovery center already equipped and ready to begin the process of resuming critical operations following a disaster
- A hot standby site cuts recovery time to an absolute minimum by already having current data available, instead of having to restore from backup media. The ultimate manifestation would be a complete dedicated standby system.

Source: INPUT/Comdisco

C

Research Methodology

INPUT interviewed 91 users of business continuity services and 47 prospective users in the United States. The interviews took place in July/August 1997.

Exhibit I-2 shows the distribution of the BCS customer sample by vertical sector.

Exhibit I-2

BCS Customer Sample Split By Industry

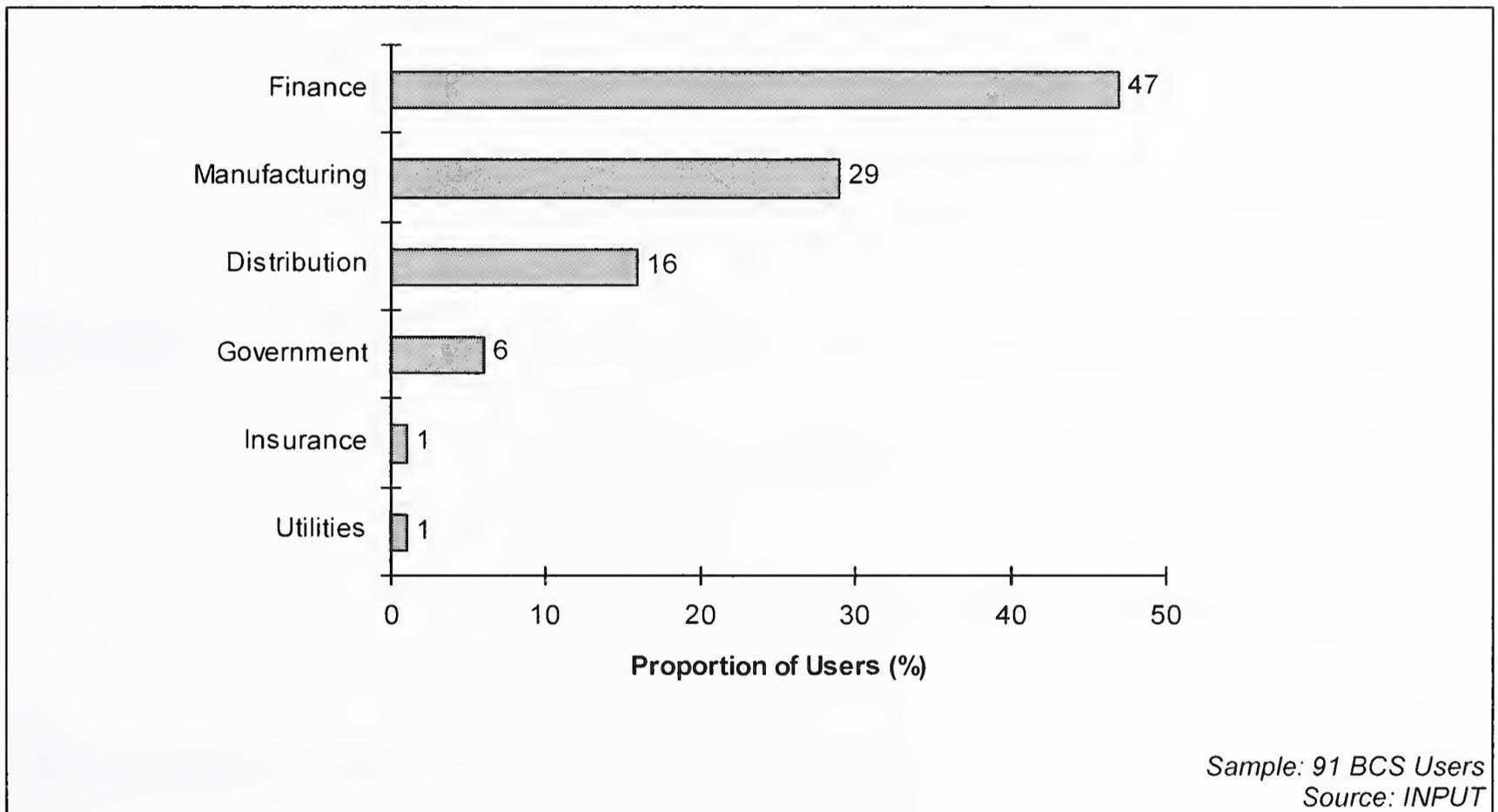
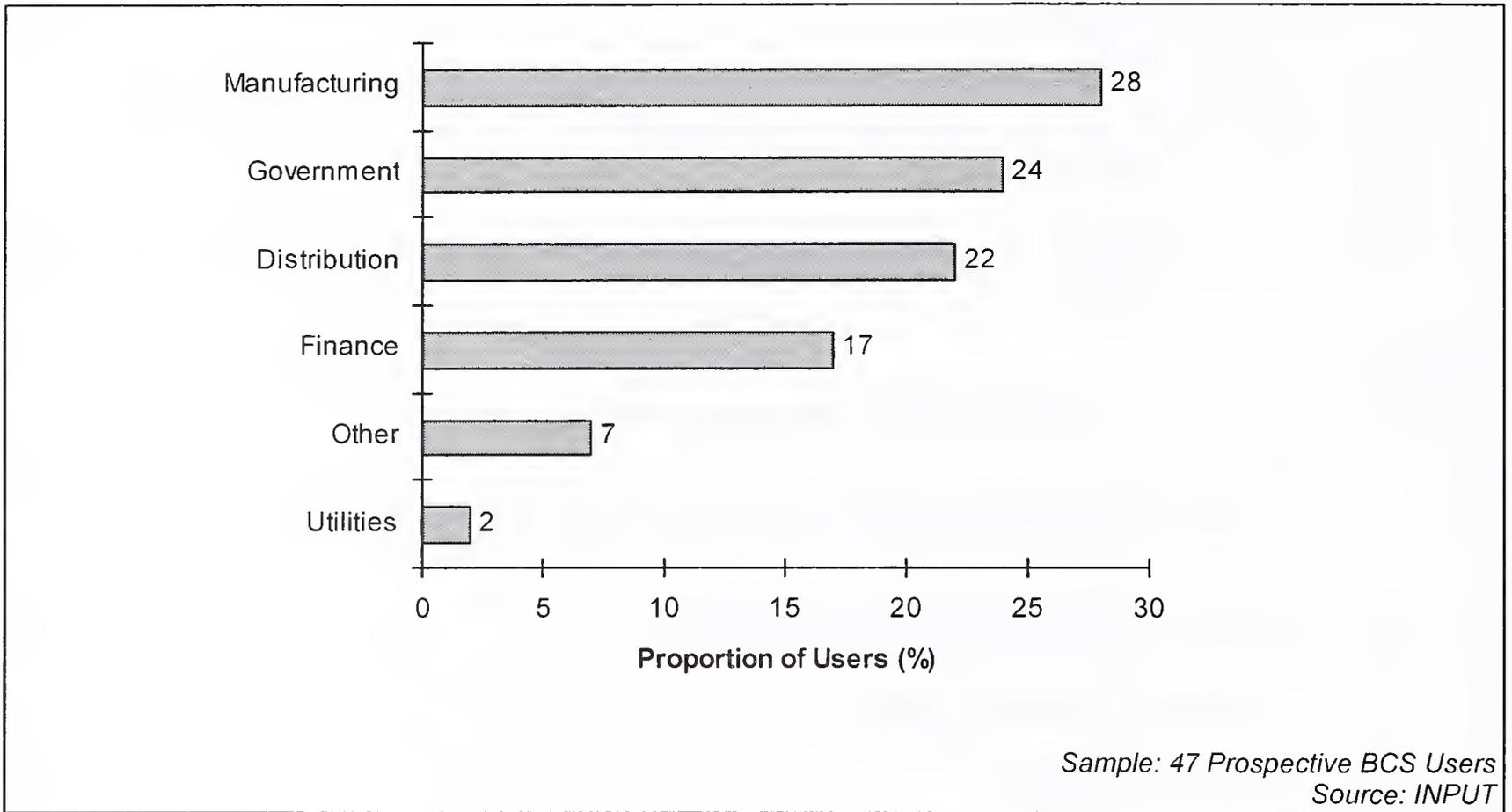


Exhibit I-3 shows the prospective BCS customer sample by industry.

Exhibit I-3

Prospective BCS Customer Sample Split By Industry



D

Report Structure

The remaining chapters of this report are as follows:

- Chapter II is an executive summary which provides a summary of the key findings of the study
- Chapter III examines the BCS market. It analyzes the market by service types and platform and offers commentary on future opportunities
- Chapter IV analyzes the BCS industry and analyzes user perceptions of BCS vendors
- Chapter V analyzes buyer behavior in terms of selection criteria when seeking BCS, perceived benefits of BCS, satisfaction with BCS and ways in which BCS could be improved
- Appendix A illustrates user perceptions of BCS vendors in more detail
- Appendix B contains the BCS user questionnaire used for this study
- Appendix C contains the BCS non-user questionnaire used for this study.

E

Related INPUT Reports

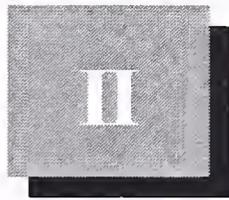
Other INPUT reports which address topics related to the subjects discussed here include the following:

IT Customer Services and Support Market Analysis 1997-2002

Desktop Services Opportunities in the United States, 1997

U.S. Call Center Operations, Requirements and Opportunities, 1997

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Executive Summary

This chapter summarizes the findings of INPUT's U.S. Business Continuity project. Additionally, it offers recommendations to business continuity services vendors on ways in which they might enhance their services.

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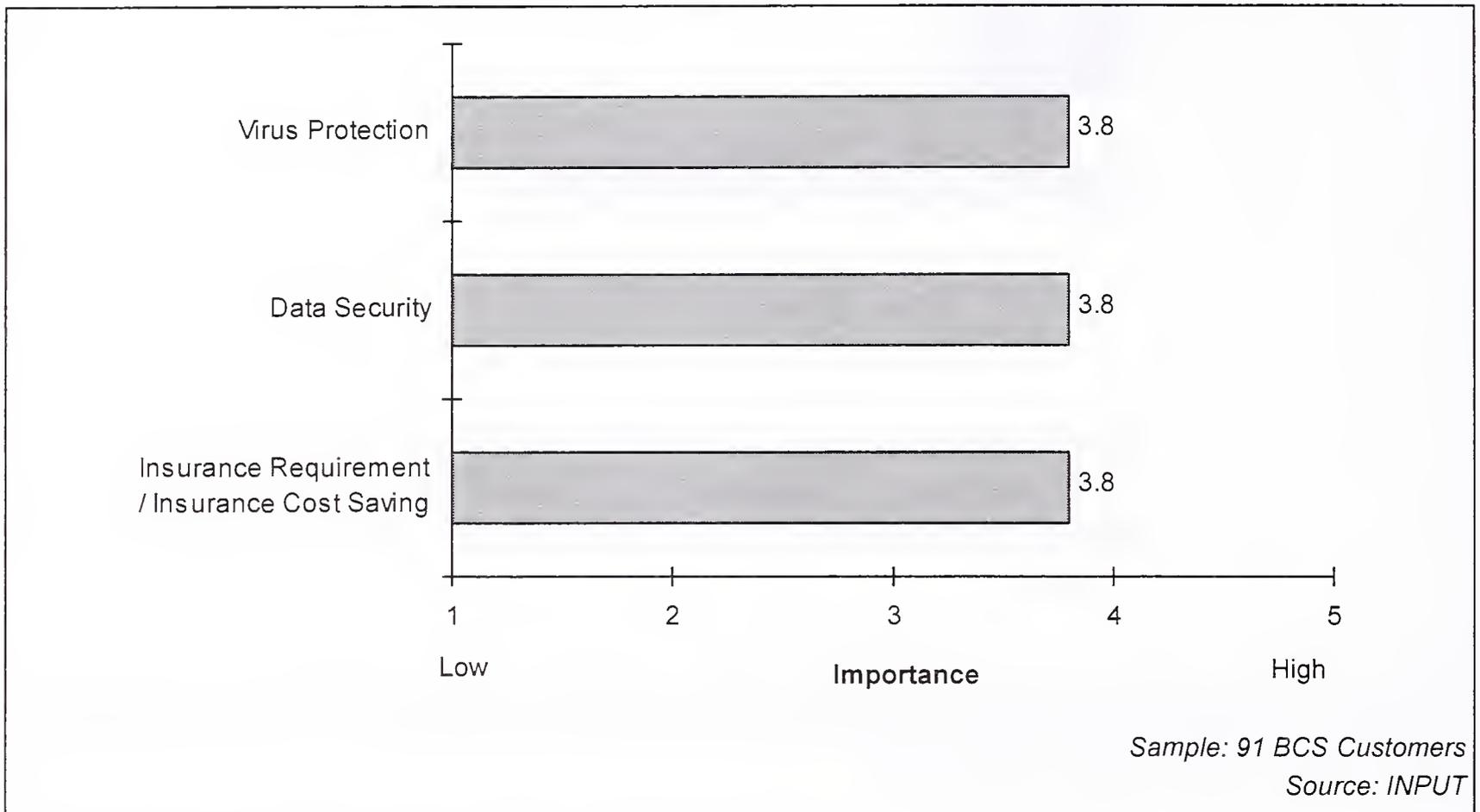
Logical Threats Outweigh Physical Threats As Reasons For Purchasing Business Continuity Services

Business continuity services (BCS) encompass more than just disaster recovery (DR) services. As logical threats pose an increasing risk to mission critical business processes, BCS offerings typically include proactive elements which seek to prevent the occurrence of logical disasters.

INPUT research reveals that today's businesses do not perceive physical threats such as terrorist bombs, floods and fires to be the main threats to the continuity of their business activities. Logical threats such as data security and hardware and software failure are now perceived to be the major threats to business activities.

INPUT asked IT managers to indicate the importance of a number of reasons for purchasing BCS contracts on a scale of 1-5 (1=very low importance, 5=very high importance). Exhibit II-1 reveals the three major reasons why customers purchase business continuity services in the United States.

Exhibit II-1

Major Reasons For Purchasing BCS Contracts

Virus protection, data security and the insurance implications of purchasing a BCS contract are the major reasons for purchasing BCS contracts in the United States. The first physical threat to business continuity is the ninth most important reason for purchasing BCS (risk of fire/floods with an importance rating of 3.2).

Against this background INPUT research reveals that:

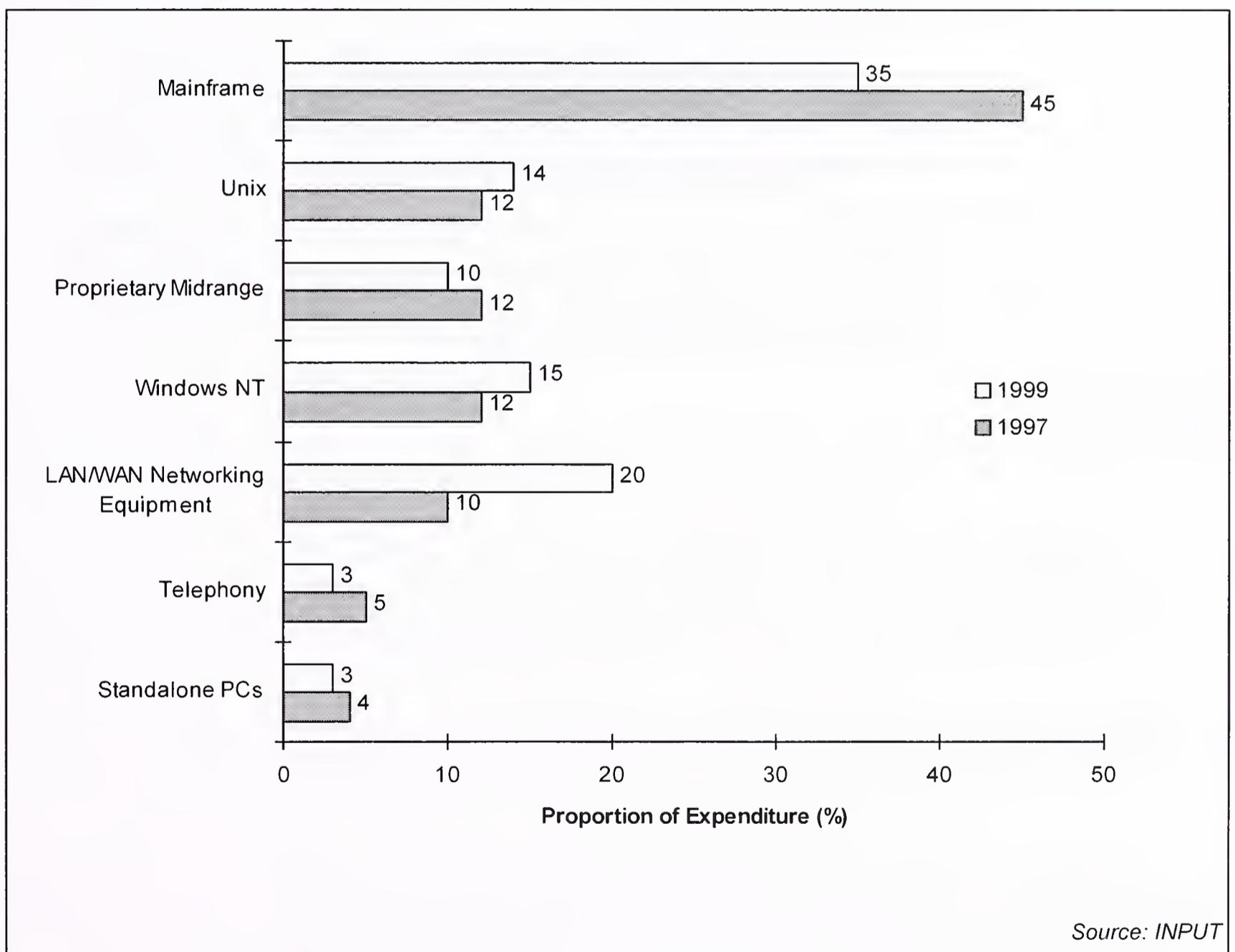
- The provision of multiplatform BCS contracts is key to sustained success in the BCS market
- Proactive and predictive planning, consultancy and management services are increasingly being included within BCS contracts
- The BCS market will be worth \$3.2 billion in 2002.

B**Multiplatform BCS Contracts Are Key**

Enterprise IT environments are changing. There is a move away from mainframe/datacentre environments towards distributed computing environments.

Exhibit II-2 illustrates the proportion of BCS expenditure that can be attributed to each IT platform.

Exhibit II-2

BCS Market Split By Platform Now And In Two Years' Time

An increasing proportion of mission critical business processes are underpinned by distributed IT. This is highlighted by the move towards purchasing BCS contracts that cover LAN/WAN networking equipment.

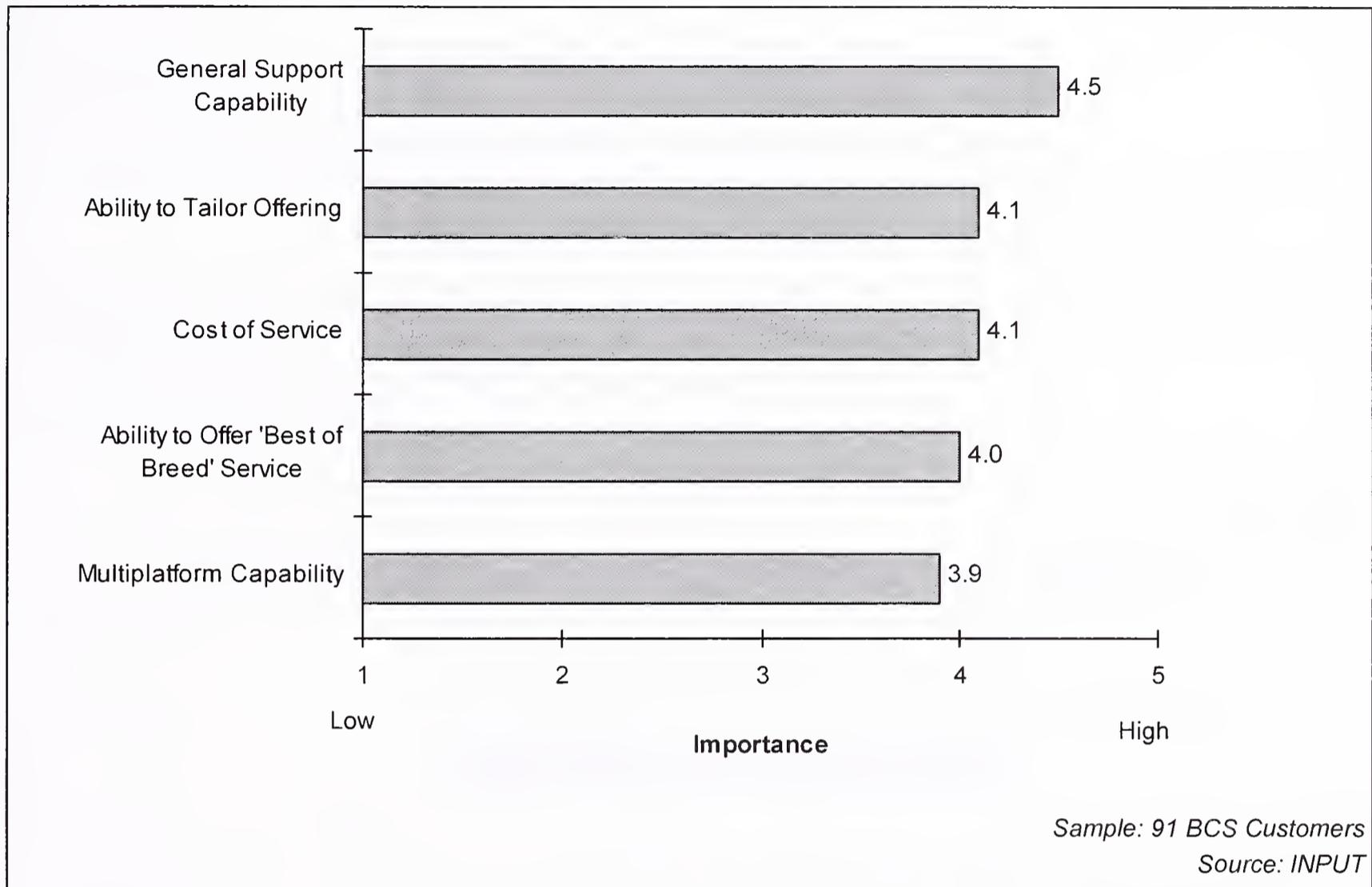
In 2 years' time, an even larger proportion of BCS expenditure (20% as opposed to 10%) will be attributable to networking equipment.

Mainframes will still account for the largest proportion of BCS expenditure. However, the proportion of BCS expenditure that is attributable to mainframes will fall from 45% to 35% over the next two years as enterprises rely more heavily on distributed technology to support their business activities. At present, approximately 50% of customers purchase BCS contracts for single platforms, mainly mainframe platforms; however this can be expected to fall to around 30% as mission critical activities are underpinned by more than one type of equipment within individual enterprises. Vendors must therefore offer multiplatform capabilities.

When asked to indicate the importance of several vendor selection criteria, where 1 = very low and 5 = very high, multiplatform capability was considered by most customers to be very important.

Indeed, approximately 60% of BCS customers consider multiplatform capability to be an important selection criterion when choosing a BCS supplier. Multiplatform capability is one of the five most important vendor selection criteria (see Exhibit II-3).

Exhibit II-3

Important BCS Vendor Selection Criteria

Over three quarters of BCS customers consider a general support capability to be an important selection criterion. Support services are becoming increasingly important in today's complex multiplatform, multivendor environments.

The ability to offer flexibility by tailoring offerings to specific customer requirements, keeping costs low and being perceived to offer 'best of breed' services are also very important selection criteria.

The use of distributed IT environments for the execution of mission critical business processes will increase the risks posed by logical threats such as virus attacks and software failure. The less complex nature of mainframe/datacentre environments makes them less vulnerable to logical threats and more exposed to physical threats. Indeed, with mainframe/datacentre environments, mission critical data is more likely to be stored in one physical environment, thus in the event of a physical disaster such as a fire, all the data will be lost.

C

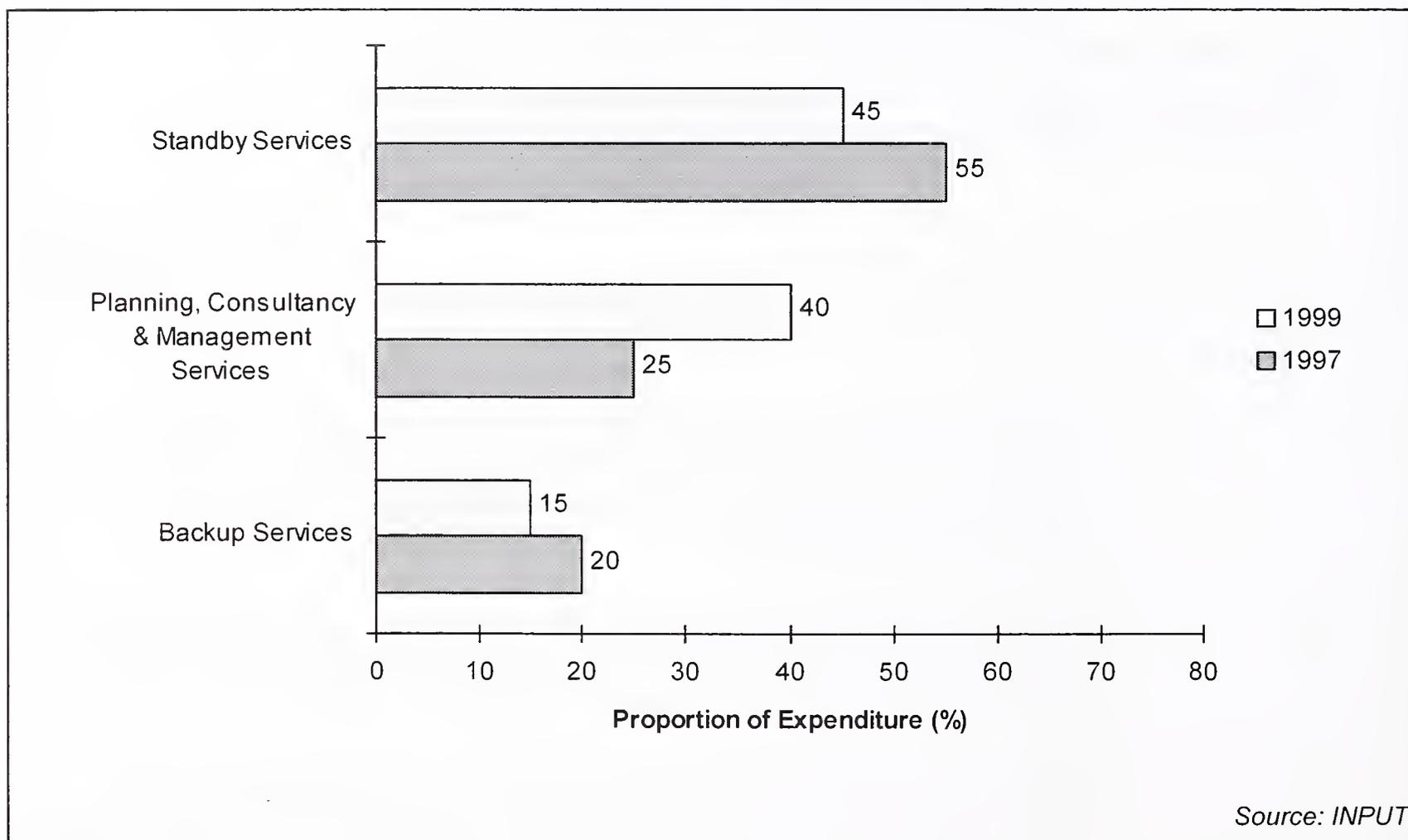
Planning And Management Services Become Prominent

As business environments evolve, so too must business continuity services. Increasingly, BCS vendors are augmenting traditional disaster recovery services, which were originally designed for mainframe environments, with proactive and predictive services that are invoked throughout the lifecycle of the business environment.

Proactive and predictive business continuity services, typically marketed as planning, consultancy and management services, account for 25% of the U.S. business continuity market. Exhibit II-4 shows that proactive and predictive BCS provisions will account for 40% of the BCS market in two years' time.

Exhibit II-4

BCS Market Split By Service Type Now And In Two Years' Time



High availability services and business continuity services are converging. Users seek availability guarantees which cover interruptions to business processes that are caused by unexpected incidents. Such guarantees can only be made if services providers work closely with their

customers throughout the business lifecycle. In order to guarantee high availability, business continuity services vendors must be involved in:

- Assessing the costs of interruptions to businesses and identifying levels of availability that meet business objectives
- Planning, designing and implementing enterprise environments to support availability requirements. For example, network architectures might be examined to ensure that there is adequate bandwidth for expected transaction loads. If there is not adequate bandwidth, networks will be re-structured or new ones will be installed
- Remote management which proactively and predictively minimizes downtime. A proactive service might monitor IT environments and anticipate technological problems enabling vendors to prevent problems from occurring. A predictive service might use trend analysis to understand the business demands placed on an IT environment. Vendors can then, for example, anticipate when transaction loads will be at their highest and take action to ensure that such loads do not compromise availability.

Of course business continuity vendors must also offer traditional business continuity services such as standby sites in order to minimize the adverse consequences of a disruptive incident but the above services will reduce the probability of such incidents interrupting business processes in the first place.

D

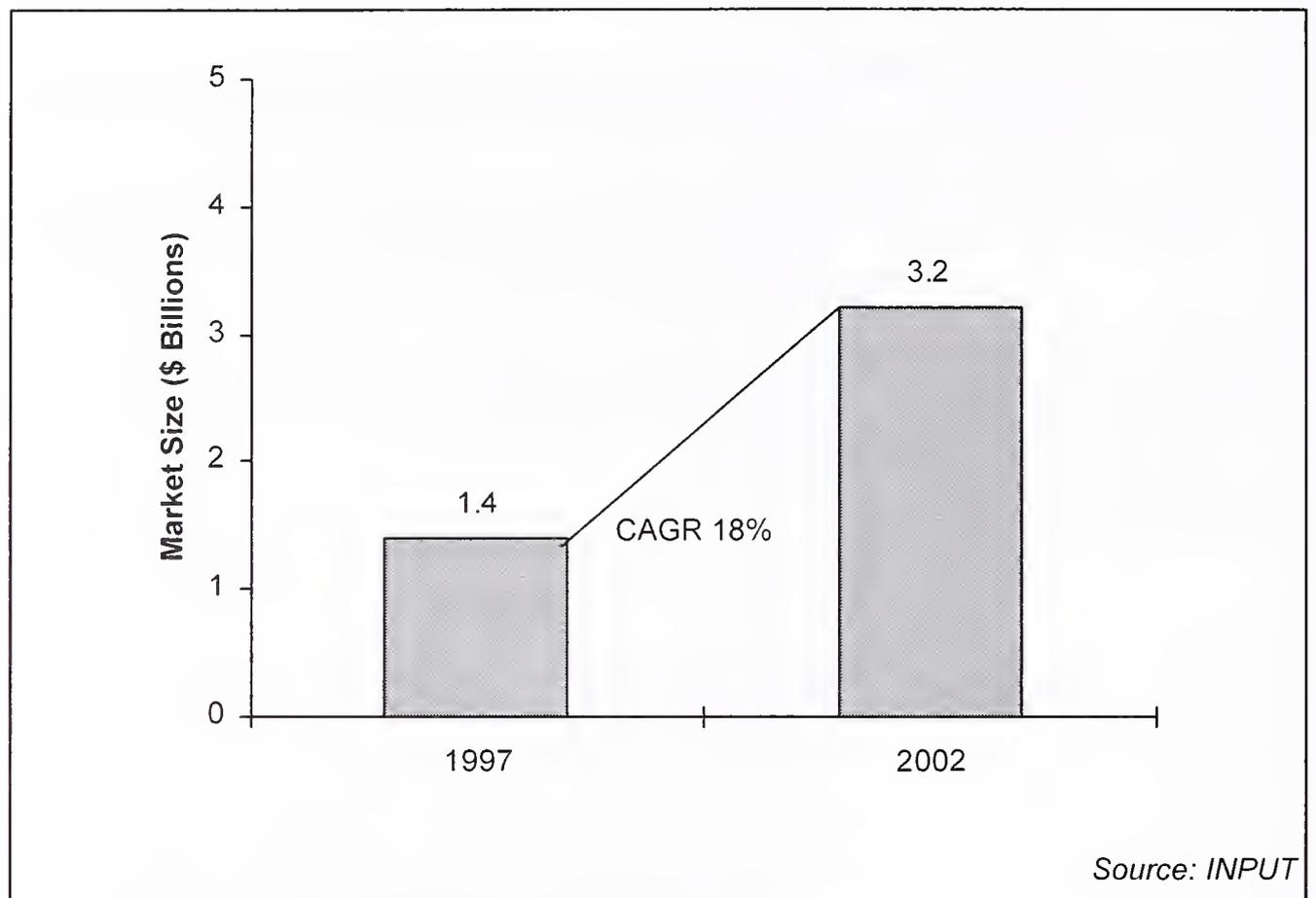
BCS Market Is Set To Reach \$3.2 Billion

Fifteen per cent of U.S. enterprises (with revenues in excess of \$50 million) have purchased currently running BCS contracts from external vendors. Of the 85% of enterprises which have not purchased BCS contracts, 90% underpin mission critical business processes with IT.

The actual BCS market in terms of the amount spent by users on BCS contracts in 1997 is estimated to be worth approximately \$1.4 billion. However, this is expected to grow to \$3.2 million in 2002 at 18% CAGR (see Exhibit II-5).

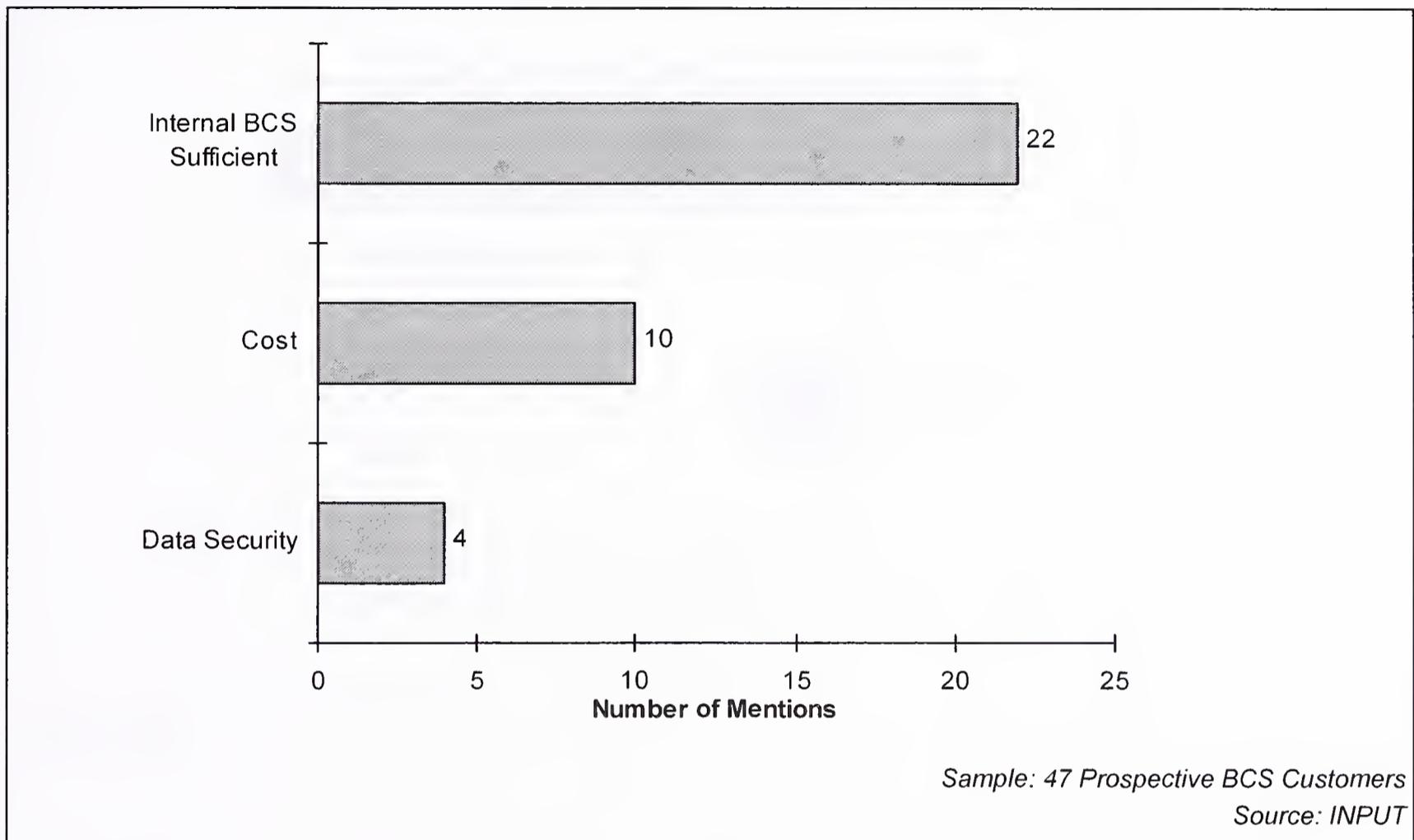
Exhibit II-5

U.S. BCS Market, 1997-2002



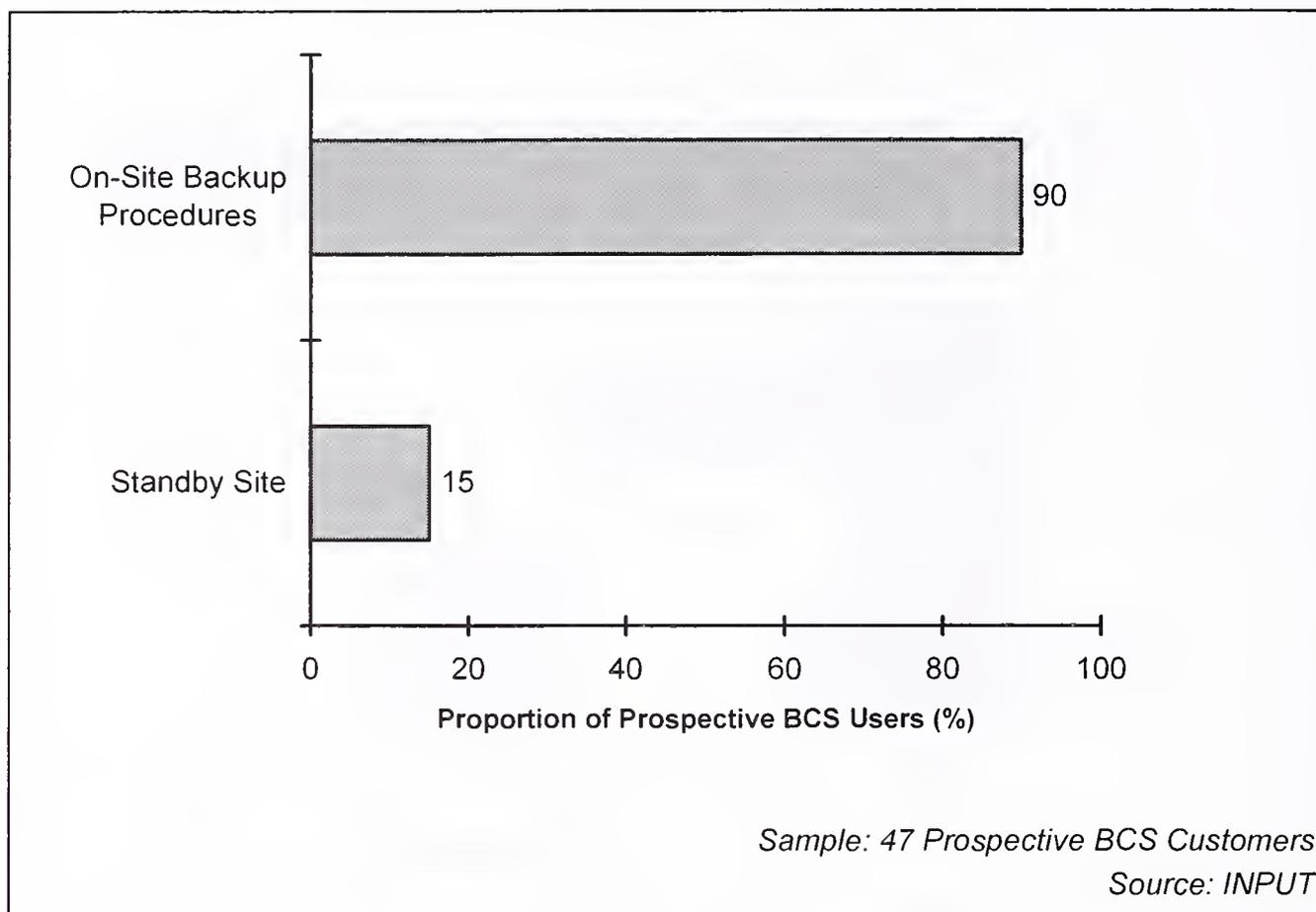
In order to enjoy growth in this market, vendors must demonstrate the value of external BCS contracts. At present, the majority of prospective users believe that their internal BCS contracts are sufficient. INPUT asked prospective BCS users to indicate why they have not purchased BCS contracts. Exhibit II-6 shows that internal BCS provision is the main reason.

Exhibit II-6

Reasons For Not Purchasing BCS Contracts

Vendors must convince prospective customers that the BCS cost/benefit ratio merits expenditure on external BCS contracts as opposed to using purely in-house resources. Of those enterprises which do not purchase BCS contracts from an external vendor, approximately 90% have their own in-house provisions. This usually amounts to on-site backup procedures which are typically carried out daily, although 15% of U.S. enterprises have their own standby sites (see Exhibit II-7).

Exhibit II-7

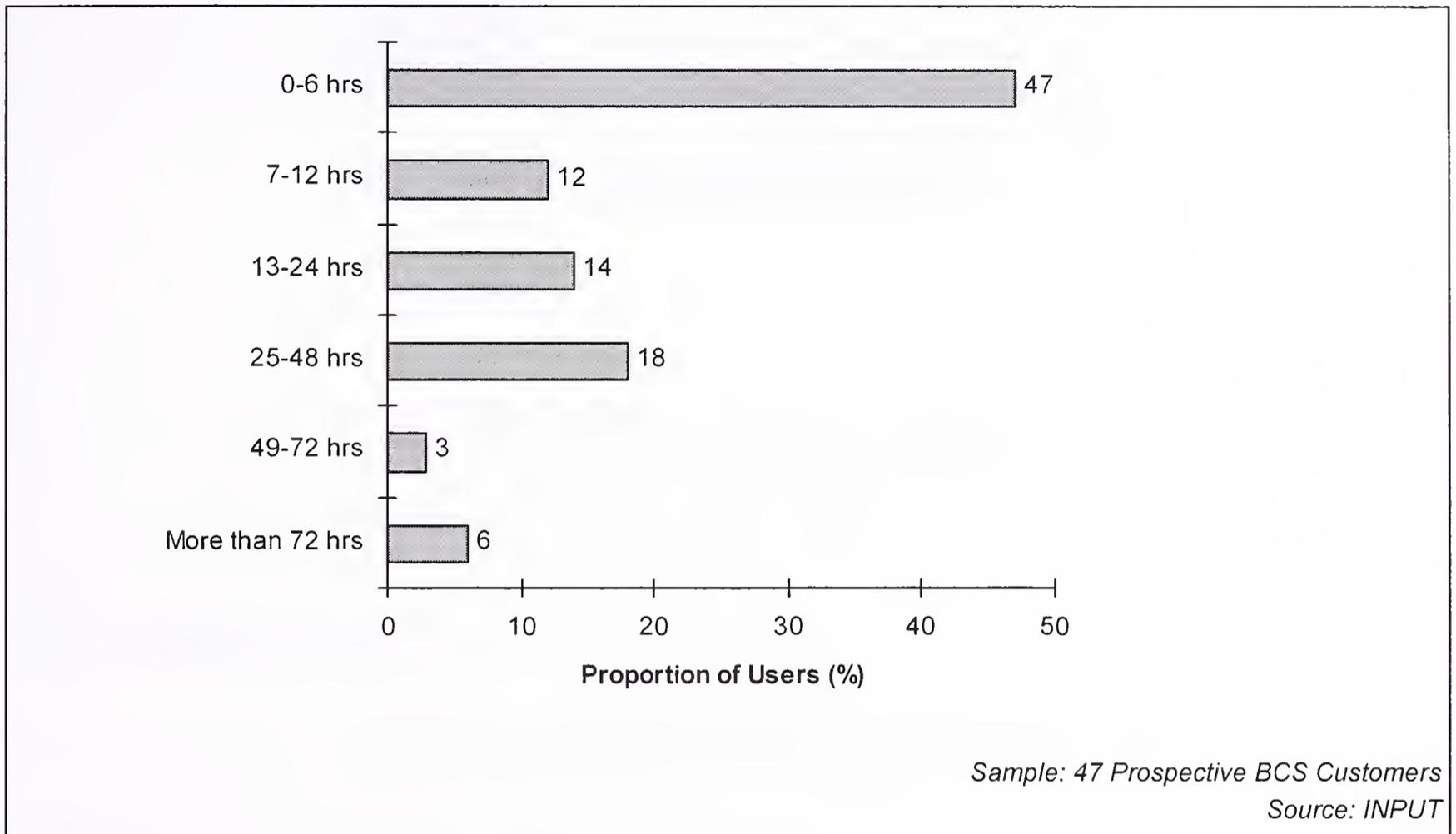
Business Continuity Provisions Of Prospective BCS Customers

On-site backup procedures may well be sufficient to protect enterprises against data loss in the event of a logical disaster. However, they do not guarantee the continuity of business processes. Additionally, on-site backup procedures are woefully inadequate in the event of a physical disaster.

Vendors must ensure that the market is aware of the potential costs of downtime. Given that approximately 60% of prospective users stated that the maximum acceptable downtime for mission critical business processes is under 12 hours, it is unlikely that in-house provisions can guarantee to continue business processes within 12 hours in the event of an interruption.

Exhibit II-8 shows the maximum downtimes that are acceptable to prospective BCS customers in the United States.

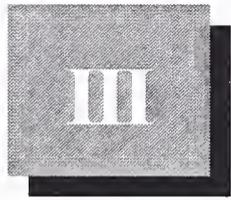
Exhibit II-8

Maximum Acceptable Downtimes For Prospective BCS Users

BCS prospects are more likely to purchase BCS contracts in the future as:

- Mission critical activities that were once underpinned by mainframes are carried out in distributed IT environments which are more vulnerable to increasingly common logical threats
- An increasing proportion of mission critical business activities become underpinned by IT
- The Internet is used increasingly for mission critical activities, increasing threats to data security and exposure to viruses
- Cost/benefit ratios for external BCS contracts are demonstrated
- It becomes clear that in-house BCS provisions are often insufficient to meet availability requirements.

INPUT estimates that the average annual cost of a BCS contract is in the region of \$60,000 in the United States. However, this figure must not be taken at face value as the variation in costs is great. Indeed, as might be expected, the amount spent on BCS is a function of the size of an organization and its dependence on IT. Note that there is little variation across vertical industries.



Market Development

This chapter examines the business continuity services (BCS) market. It analyses the market by service types and platform and offers commentary on future opportunities.

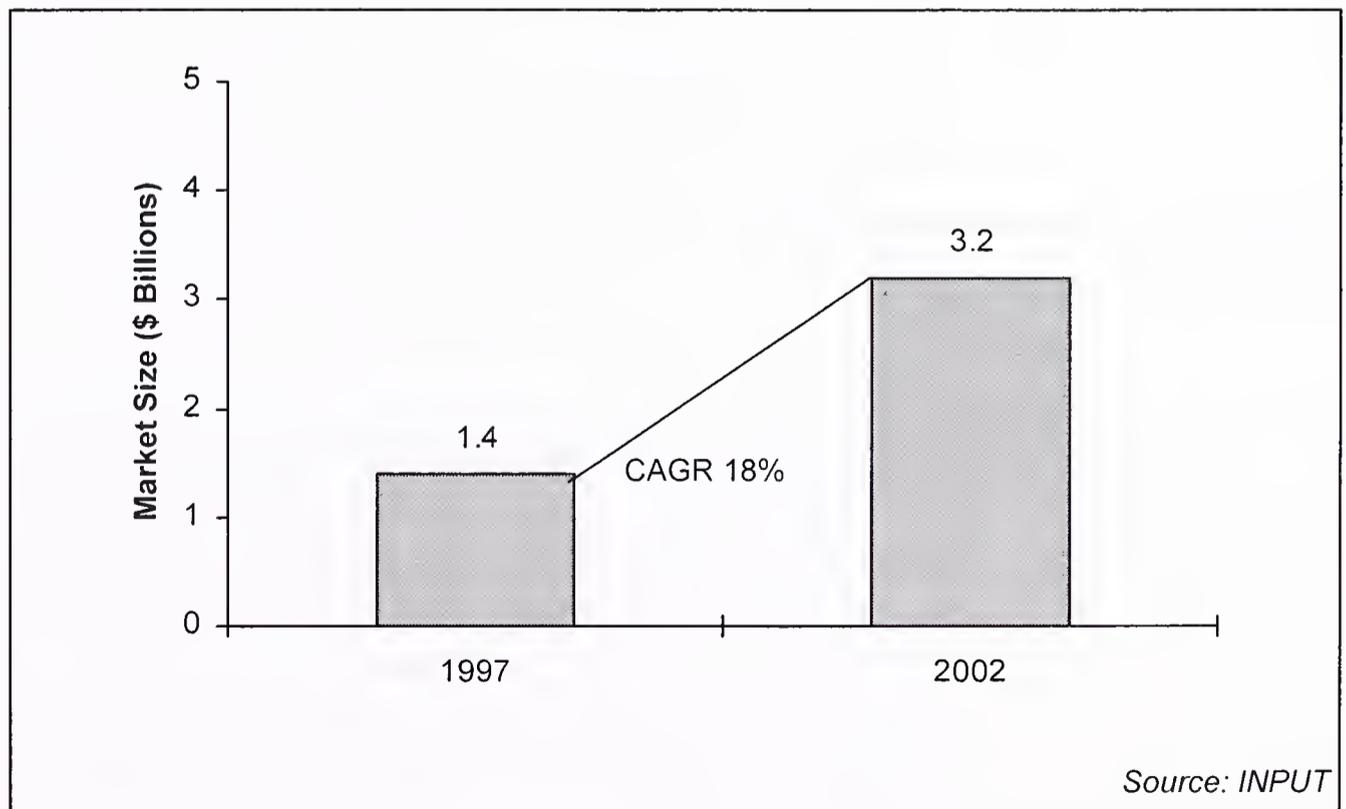
A

BCS Market Growth

The BCS market can be expected to grow from \$1.4 billion in 1997 to \$3.2 billion in 2002 at 18% CAGR (see Exhibit III-1).

Exhibit III-1

U.S. BCS Market, 1997-2002



BCS market growth will be driven by:

- The increasing proportion of mission critical business activities that are underpinned by IT
- The growing vulnerability of businesses to logical threats such as viruses as a result of today's increasingly distributed IT environments
- BCS is not perceived to be a core activity
- The increasing importance of data security
- The threat posed by the Y2K date change.

INPUT research indicates that approximately 15% of enterprises with global revenues in excess of \$50 million protect their businesses with a BCS contract in the United States. BCS specialists are increasingly offering consultancy, planning and management services to existing customers in order to increase their revenues. Systems vendors are extending the scope of their consultancy, planning and management services and including such services in a package that typically includes more traditional BCS services such as standby services.

Importantly, many enterprises which do not have BCS contracts purchase other kinds of customer services, some of which include elements of BCS. For example, many network services contracts include proactive network management services that are designed to minimise downtime. Maintenance contracts and warranties will also overlap with BCS contracts in the event of most logical disasters.

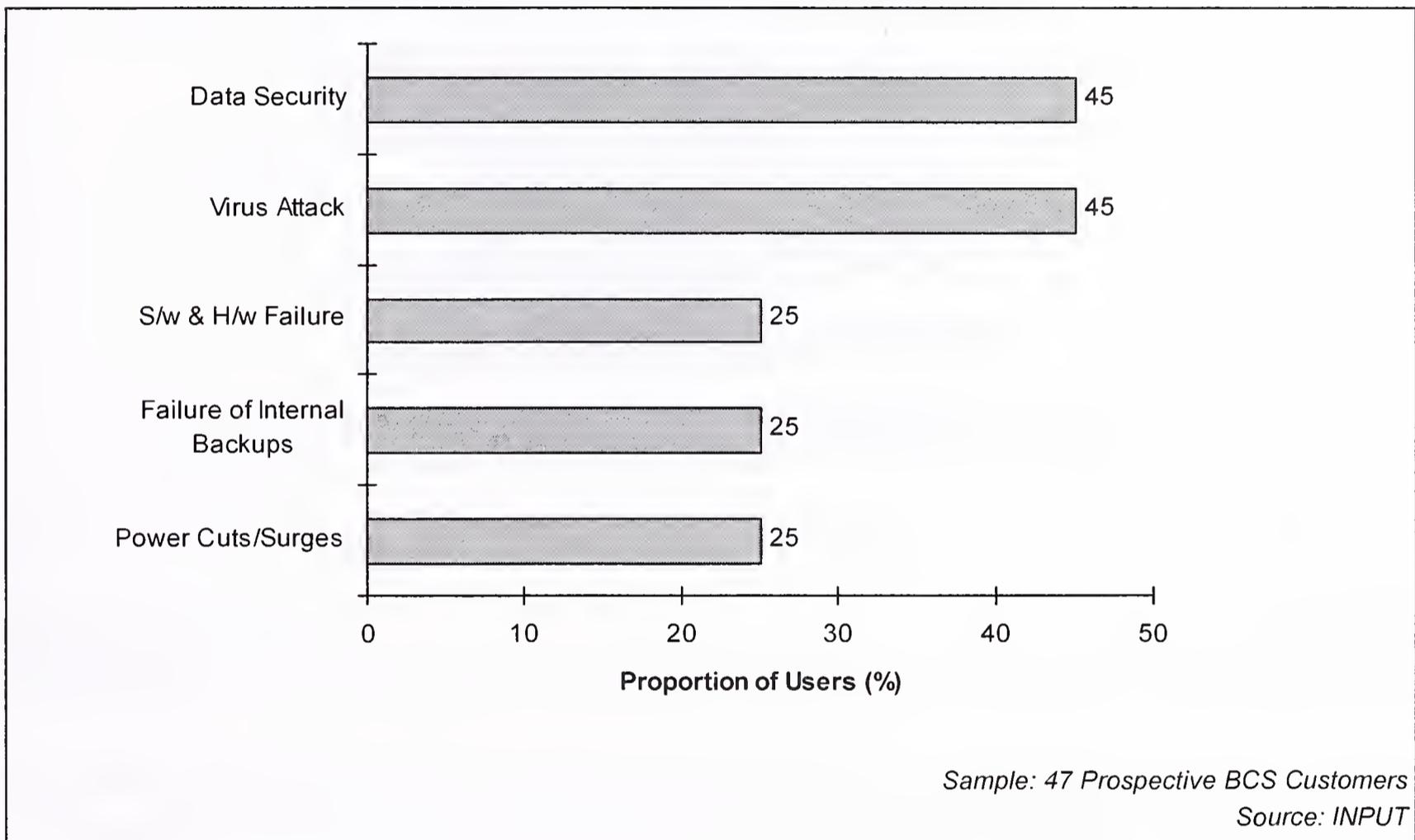
The growth in the BCS market will be fuelled largely by new customers as opposed to offering existing customers additional services. However, BCS is still often viewed as reactive disaster recovery. Vendors must encourage enterprises to view BCS as an integrated service offering that offers a full range of proactive, predictive and reactive services that are used throughout the lifecycle of a business environment. In other words, BCS services should be marketed prior to implementation and should not just be invoked in the event of a disaster but used continuously to minimise the impact of any disaster and to prevent disasters where remotely possible.

As an increasing proportion of mission critical activities are carried out in distributed IT environments, so logical threats increase. Indeed, INPUT research reveals that the five major perceived threats to prospective BCS users and to existing BCS customers are logical.

Exhibit III-2 reveals which factors prospective BCS users believe pose a significant threat to the continuity of their businesses.

Exhibit III-2

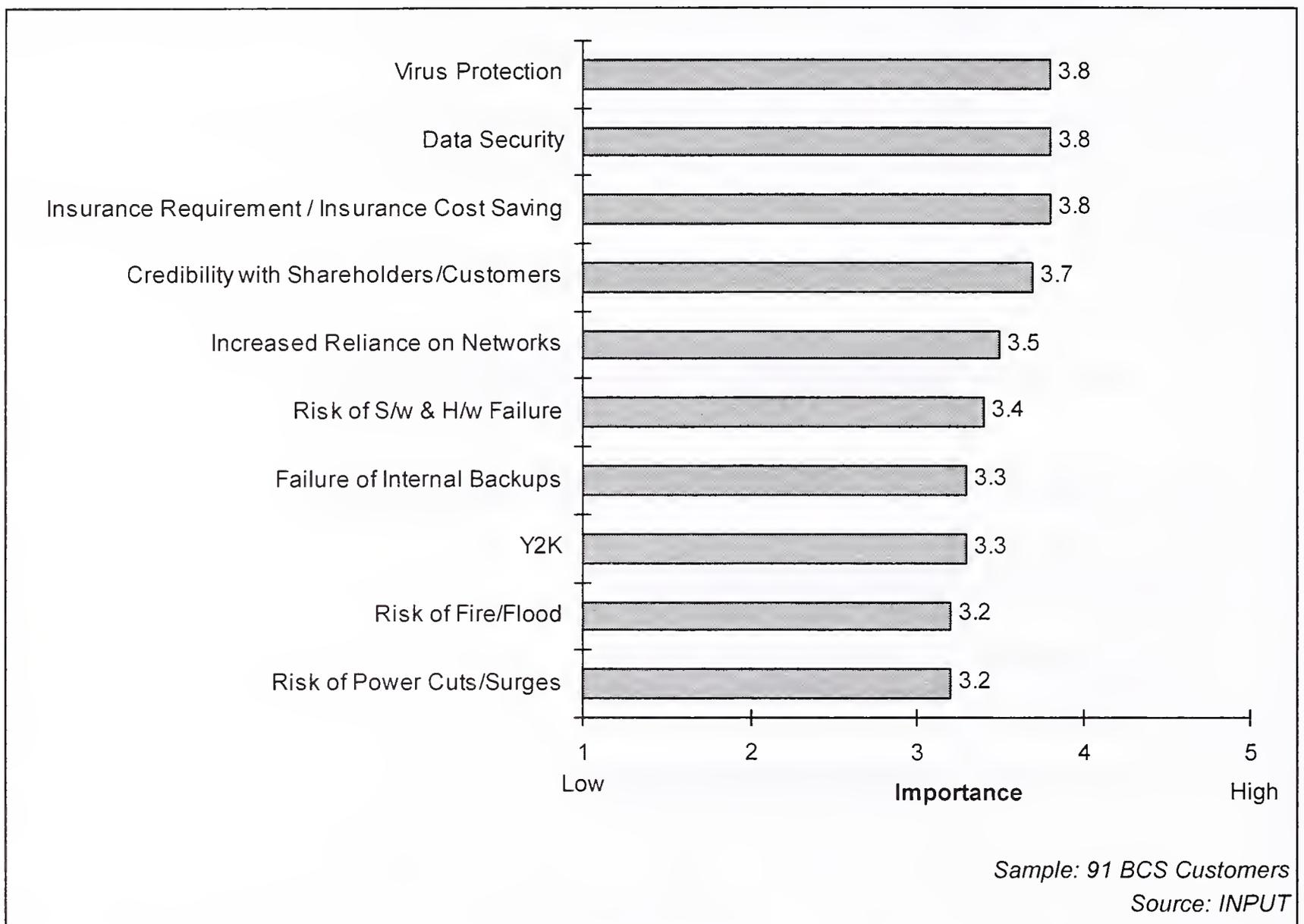
Threats To Businesses Of Prospective BCS Users



INPUT asked customers to indicate the most important reasons for purchasing BCS contracts on a scale of 1 to 5 (where 1=not at all important and 5 = very important). Exhibit III-3 illustrates the ten most important reasons for purchasing BCS contracts.

Exhibit III-3

Reasons For Purchasing BCS



Interestingly, BCS customers perceive the data security and the failure of internal backups to be the two most important reasons for purchasing BCS contracts.

Exhibits III-4 to III-6 illustrate the most important reasons for purchasing BCS contracts within major industries.

Exhibit III-4

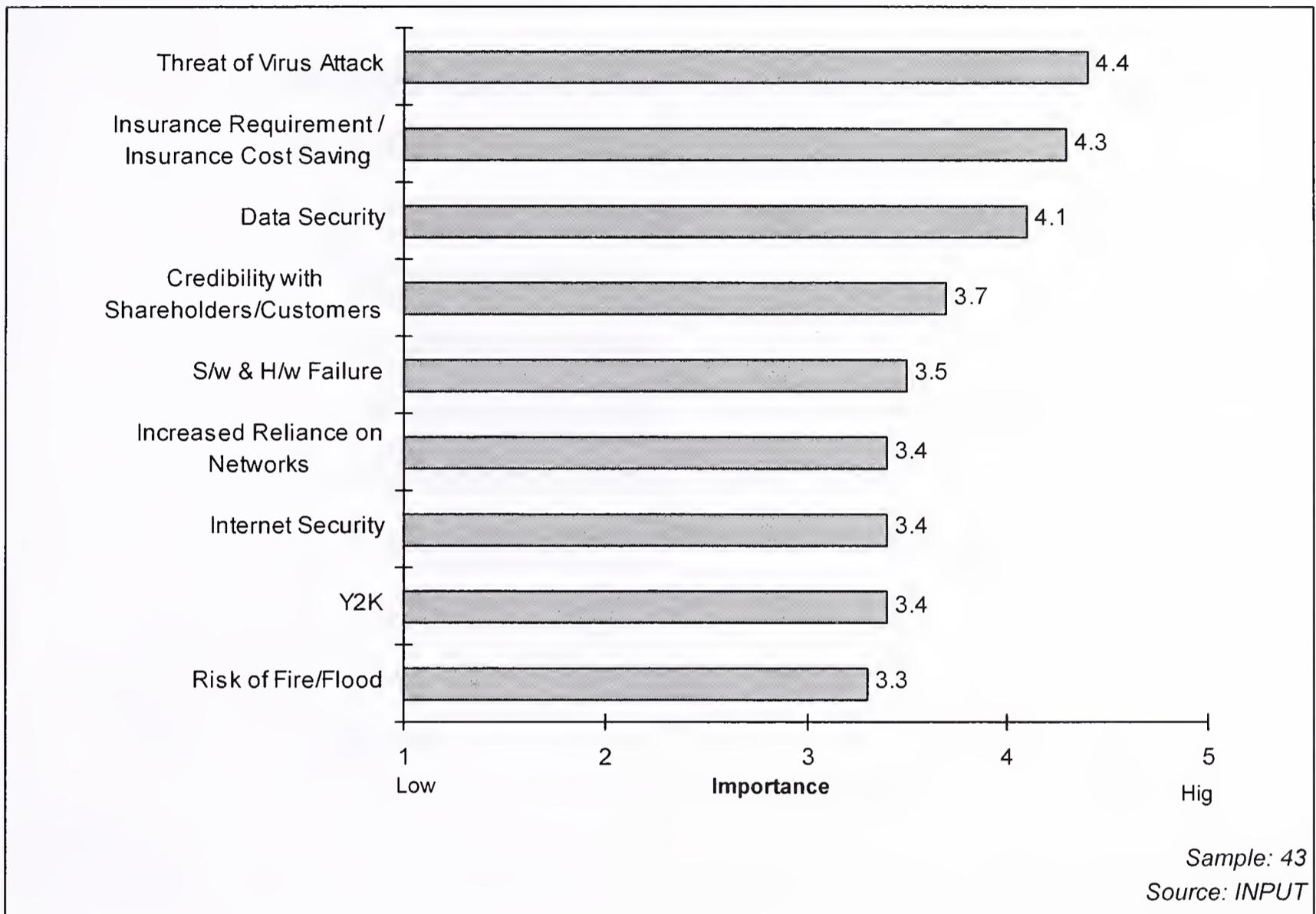
Reasons For Purchasing BCS In Banking & Finance

Exhibit III-5

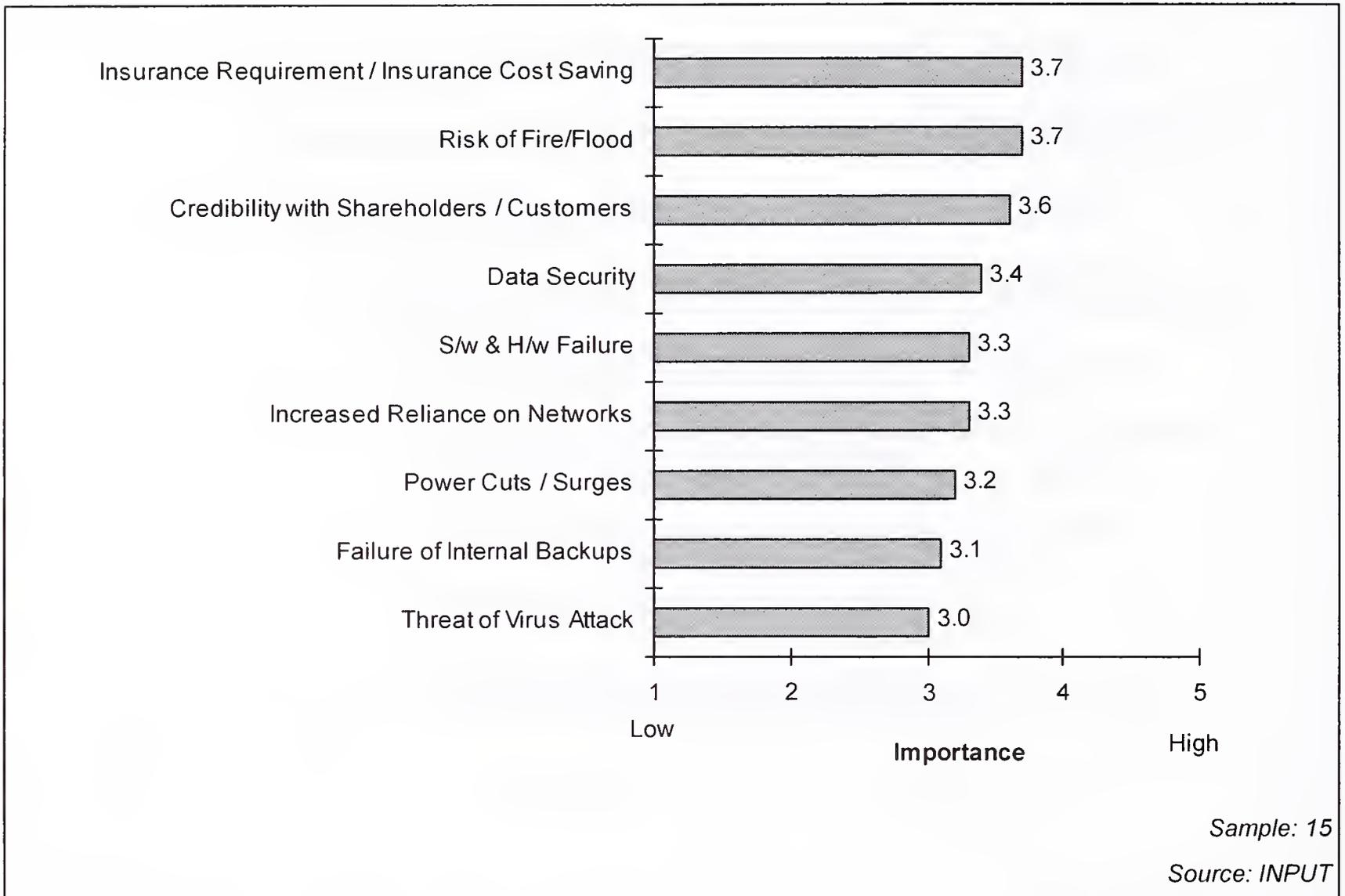
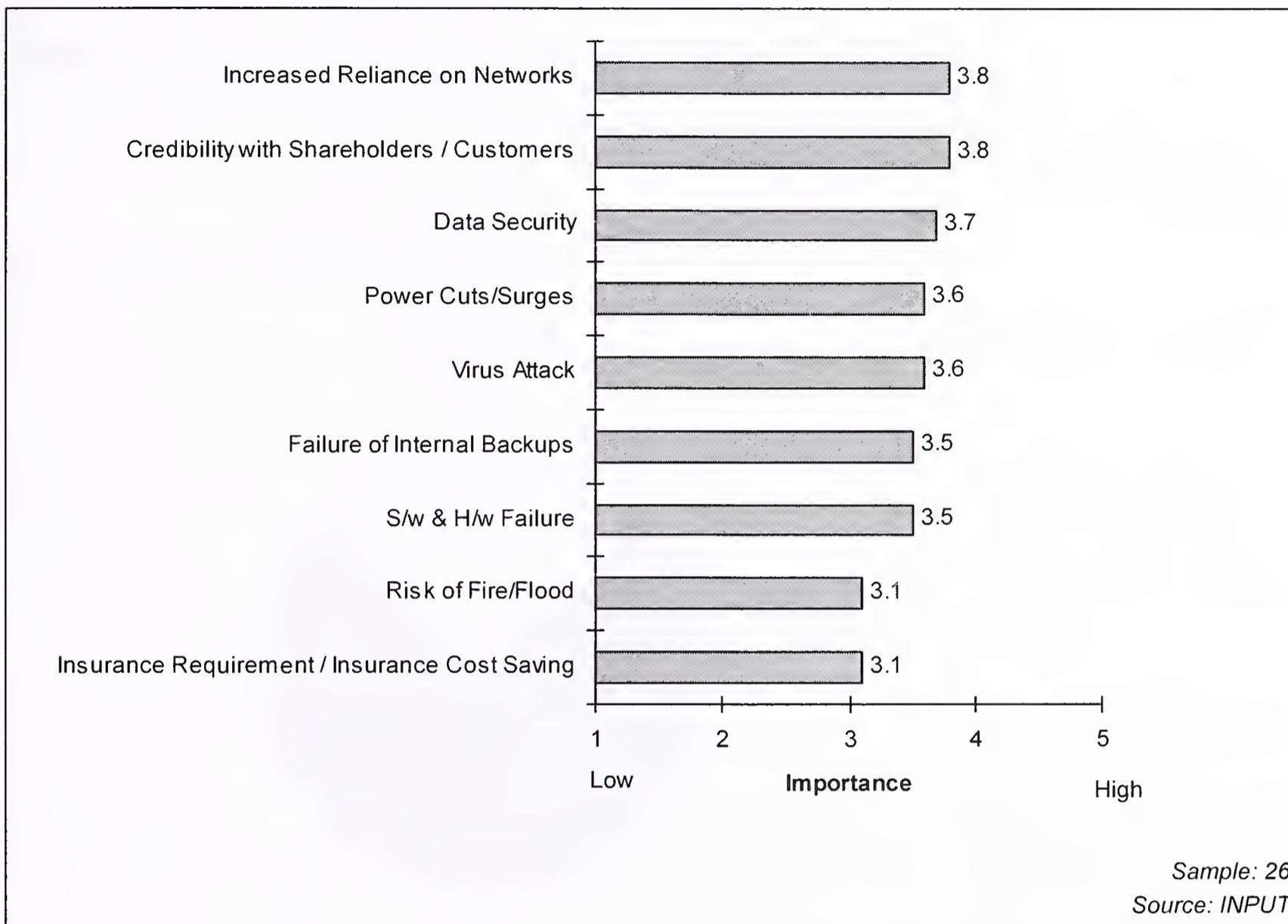
Reasons For Purchasing BCS In Distribution

Exhibit III-6

Reasons For Purchasing BCS In Manufacturing

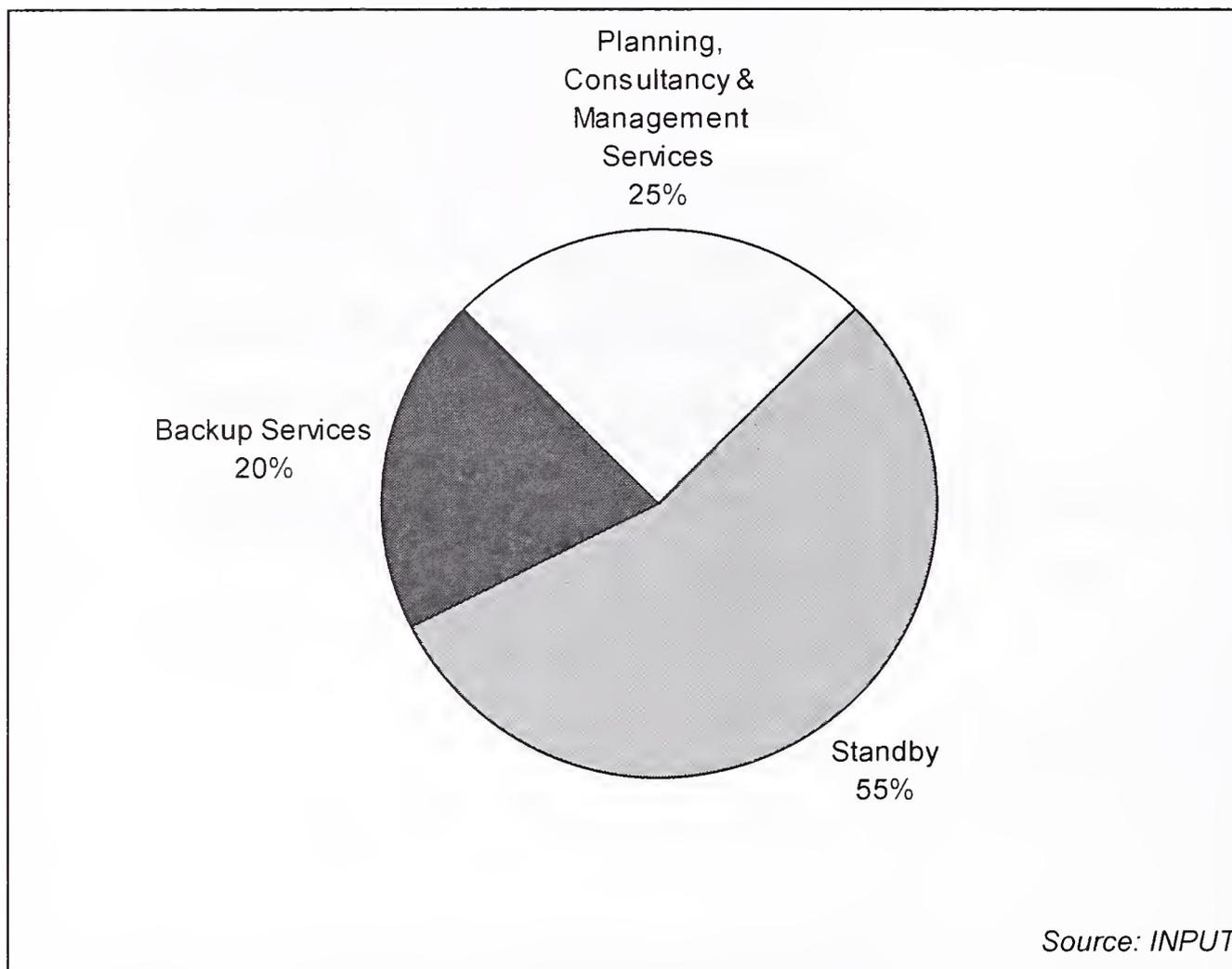


When the most important reasons for purchasing BCS contracts are analysed by industry, logical threats are generally considered to be more important than physical threats. However, some industries have their own distinct characteristics. For example, in the distribution industry, the risk of fire/flood is one of the two most important drivers.

B**Market Growth Split By Service Type**

Of the BCS market, 55% of the market can be attributed to standby sites, 20% to backup services and 25% to planning, consultancy and management services (see Exhibit III-7).

Exhibit III-7

BCS Market Split By Service Type

Currently, planning, consultancy and management services account for a relatively small 25% of BCS contracts in terms of value. The market for planning, consultancy and management services for business continuity is actually much larger than the \$350 million associated with BCS contracts. Much consultancy is sold as part of other types of contracts. For example, many management consultancies offer contingency planning services. Systems vendors offer planning services designed to maximise availability, and remote management services designed to proactively minimise downtime. The market for these types of services is becoming increasingly fragmented as vendors from many different backgrounds attempt to fully exploit BCS opportunities.

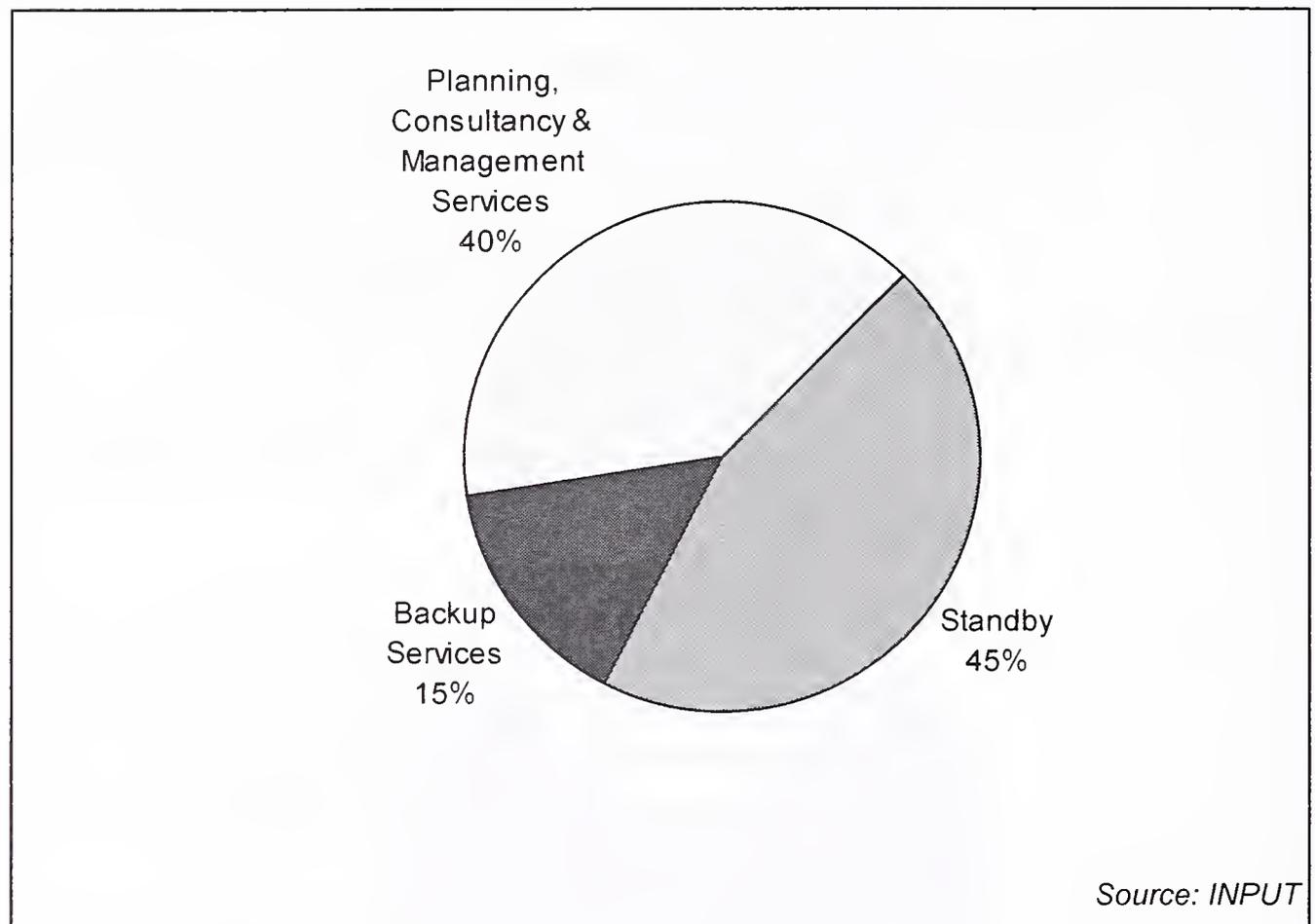
INPUT believes that the greatest opportunities in the BCS market lie and will continue to lie in the provision of proactive planning, consultancy and management services. Traditionally business continuity services were essentially reactive services — when a problem occurs business continuity plans were invoked. However, although customers do require such services, many require an integrated service offering, which will guarantee business continuity to a certain degree. Such guarantees can be honoured not only by invoking traditional reactive BCS plans but also by using proactive BCS services such as:

- Assessment services - such services assess the cost of interruptions to a business and identify levels of availability that meet business objectives
- Planning and design services - such services design enterprise environments to support availability requirements. For example network architectures might be examined to ensure that there is adequate bandwidth for expected transaction loads. If there is not adequate bandwidth, the network will be re-designed
- Remote management services - such services are designed to proactively and predictively minimise downtime. A proactive BCS might monitor IT environments and anticipate technological problems enabling vendors to prevent problems from occurring. A predictive BCS might use trend analysis to understand the business demands placed on an IT environment. Vendors can then, for example, anticipate when transaction loads will be at their highest and take action to ensure that such loads do not compromise availability.

It must also be noted that many businesses undertake their own risk analyses and planning. Typically, they purchase some consultancy services from a BCS vendor with a BCS contract but do use an external vendor to help revise their plans thereafter.

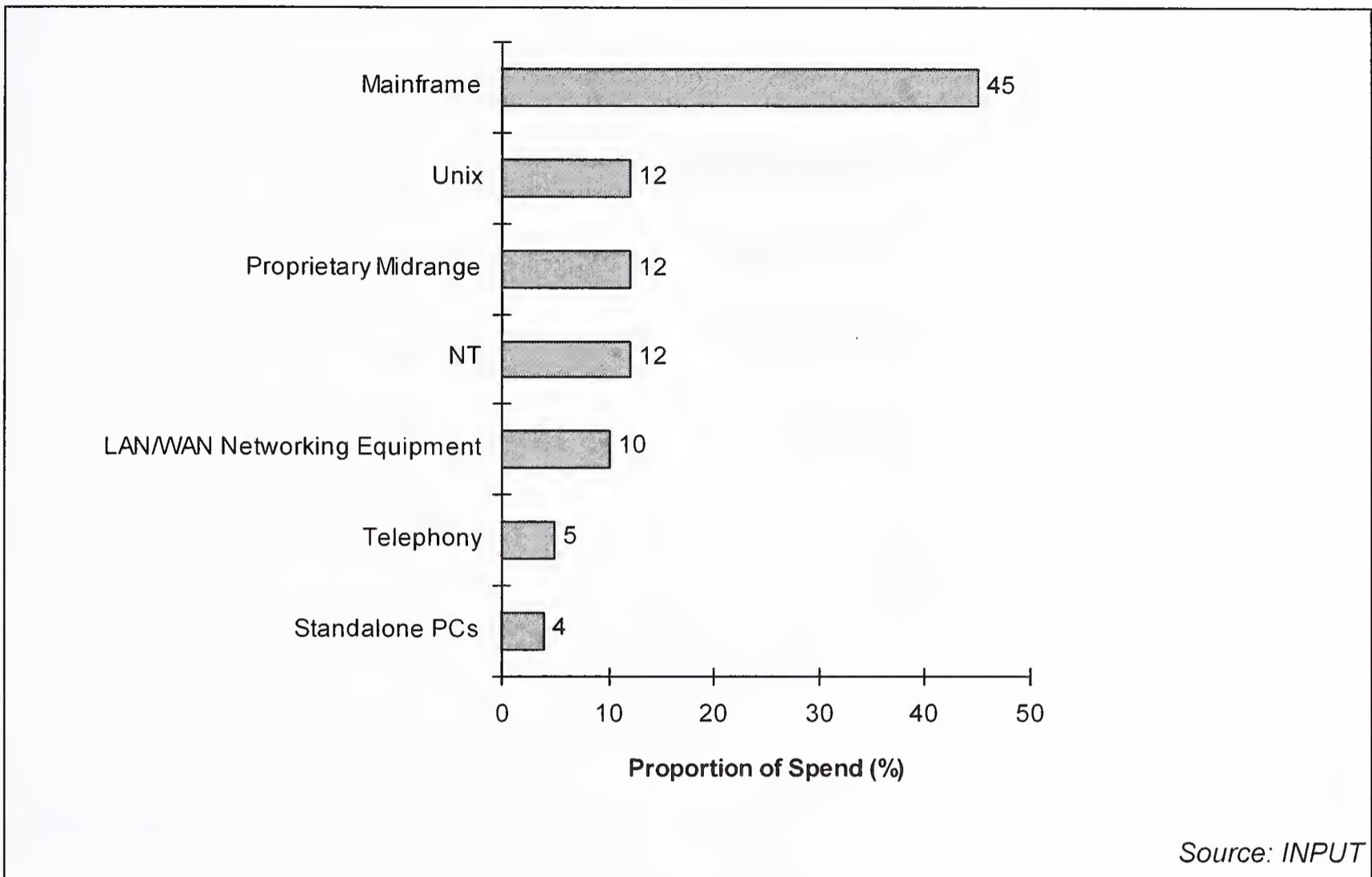
BCS vendors are becoming increasingly aware of the importance of consultancy-style services and include them in BCS contracts wherever possible. Equally, users are becoming increasingly aware of the importance of consultancy-style services as an increasing proportion of business processes are undertaken using IT. For these reasons, planning, design and consultancy will account for 40% of the BCS market in 2 years' time (see Exhibit III-8).

Exhibit III-8

BCS Market Split By Service Type In Two Years' Time**C****BCS Market Split By Platform**

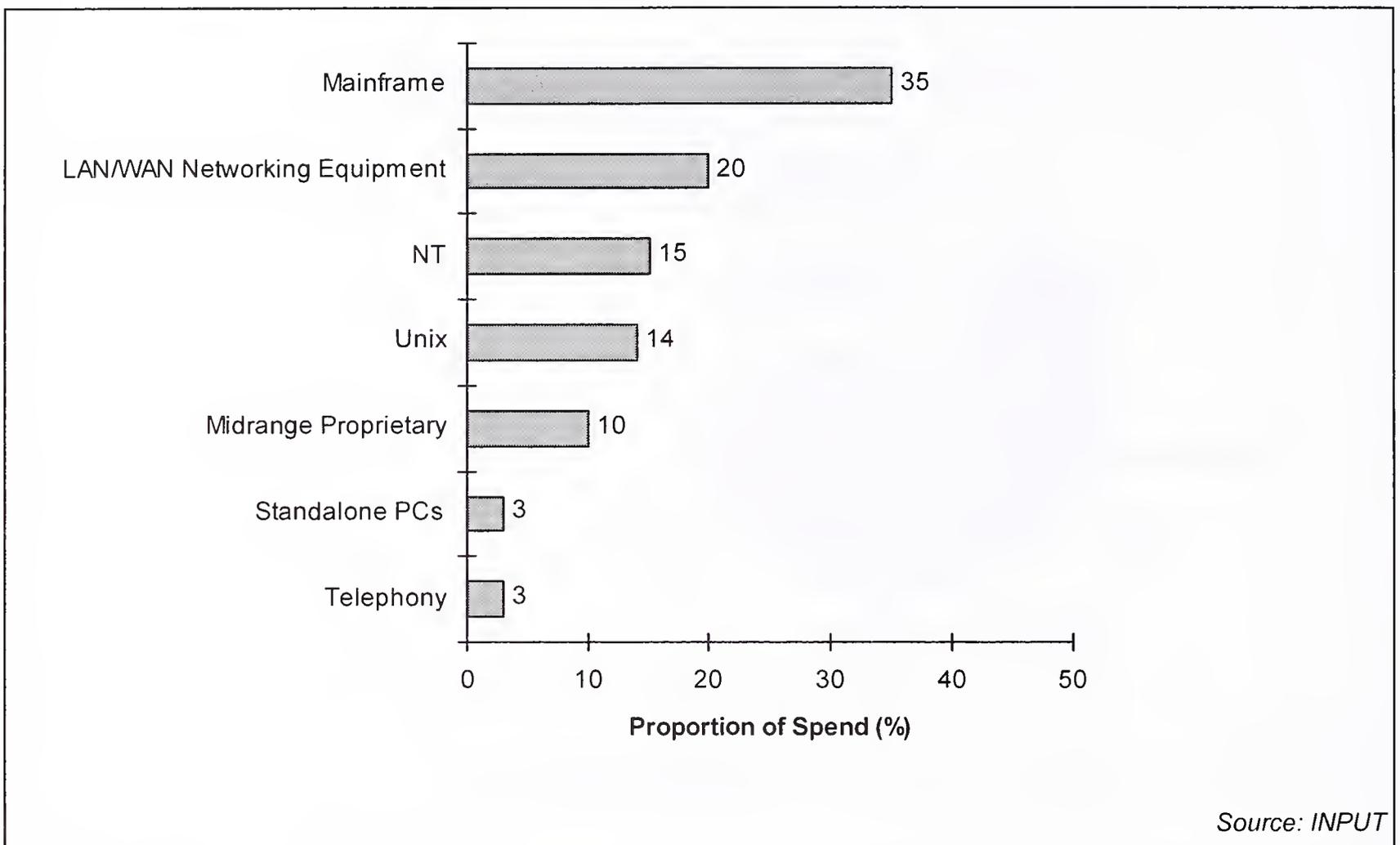
Approximately 45% of the BCS market can be attributed to mainframe platforms. Around 12% can be attributed to proprietary midrange servers such as AS/400s Unix servers and NT servers respectively. Ten per cent of the market can be attributed to networking equipment for LANs and WANs while standalone telephony and PCs account for 5% and 4% respectively. Exhibit III-9 splits the BCS market by platform.

Exhibit III-9

BCS Market Split By Platform

As distributed IT environments become commonplace, demands for BCS increasingly reflect these changes. Although mainframes will still account for most BCS spending in the United States, BCS vendors who wish to see their businesses grow must focus to a greater extent on networking technology, Unix servers and NT servers and to a lesser extent on mainframe/datacentre environments and proprietary midrange platforms (see Exhibit III-10).

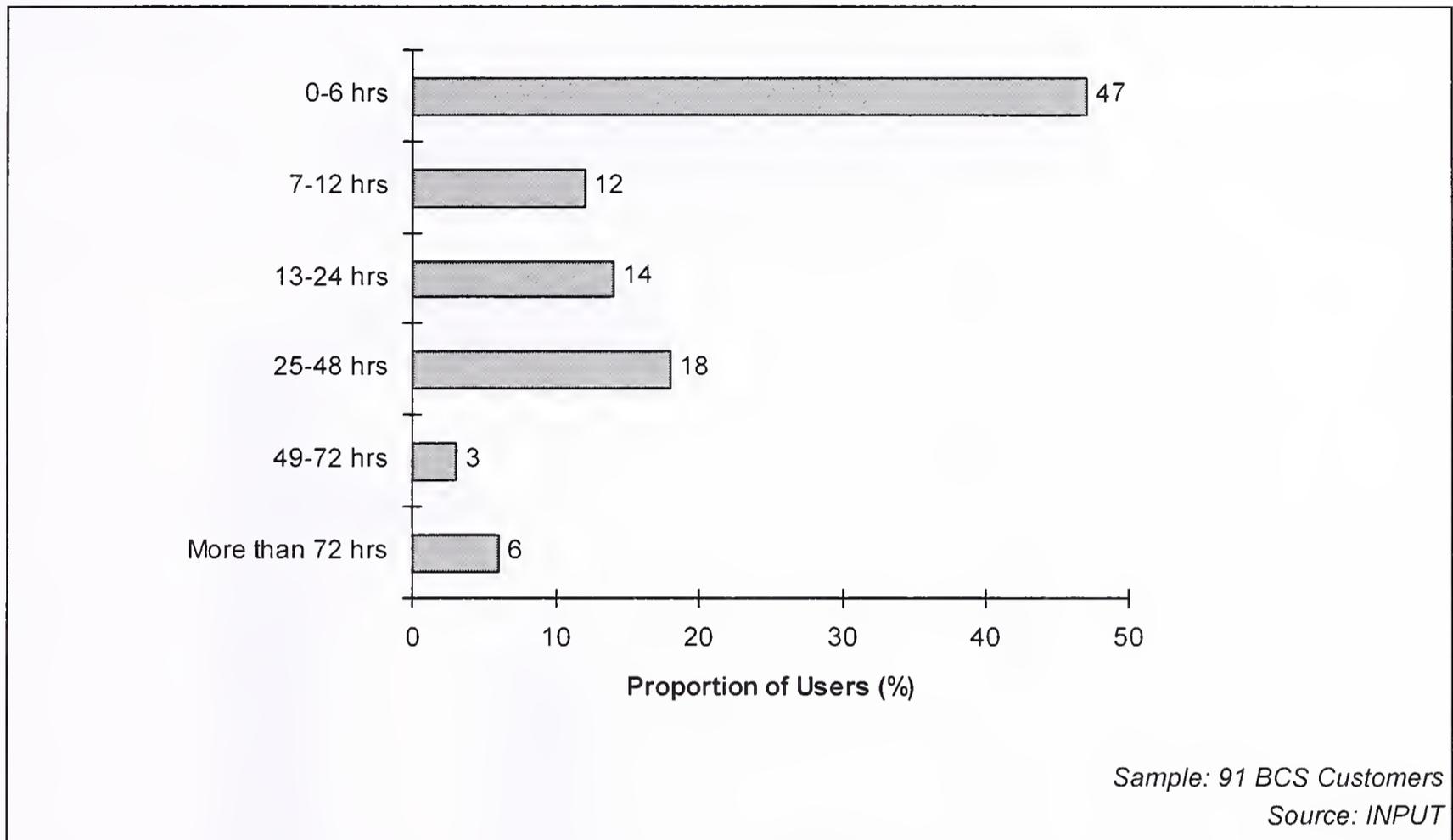
Exhibit III-10

BCS Market Split By Platform In Two Years' Time**D****Downtimes And Response Times**

Standby times vary greatly. However, as more mission critical business processes are undertaken using IT, vendors are responding to customer requirements by lowering standby times.

Customers were asked to indicate the maximum amount of time for which they could accept interruption to their most critical business processes. Exhibit III-11 reveals that nearly 60% could not accept downtime of more than 12 hours.

Exhibit III-11

Maximum Downtime Acceptance

This pattern is fairly similar across all vertical sectors which indicates that BCS vendors must offer contracts that can guarantee recovery within 12 hours in order to enjoy success in this market.

Typically, BCS vendors offer three types of standby sites:

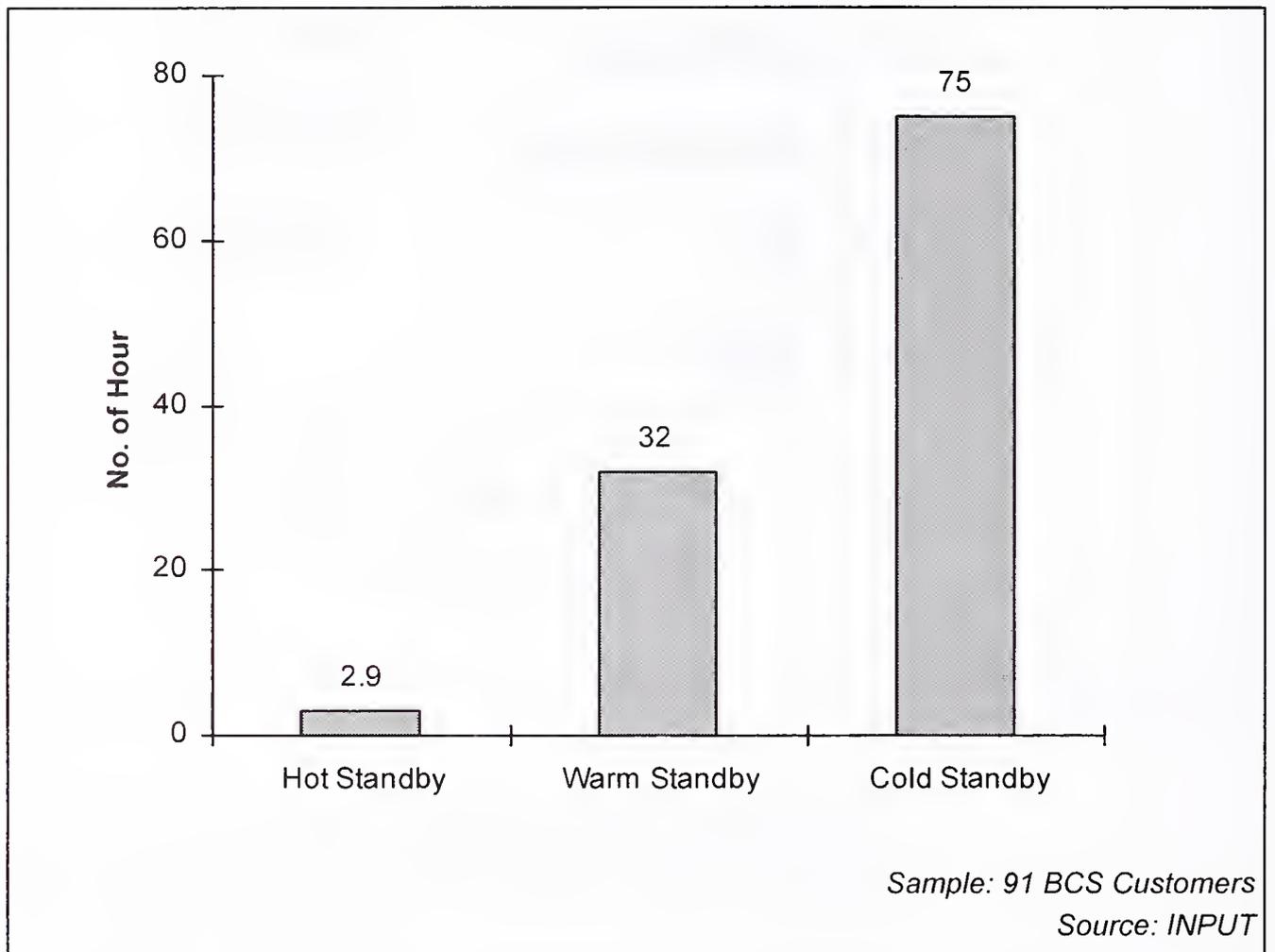
- Hot standby sites which cut recovery time to an absolute minimum by already having current data available, instead of having to restore from backup media. The ultimate manifestation would be a complete dedicated standby system
- Warm standby sites which are alternative recovery centres already equipped and ready to begin the process of resuming critical operations following a disaster
- Cold standby sites are alternative sites, minus computer hardware or office facilities, available for long term use.

INPUT asked users to indicate the amount of time that it takes for their standby sites to become available.

Exhibit III-12 illustrates average response times for hot standby, warm standby and cold standby in the United States.

Exhibit III-12

Average Response Times For Standby Sites



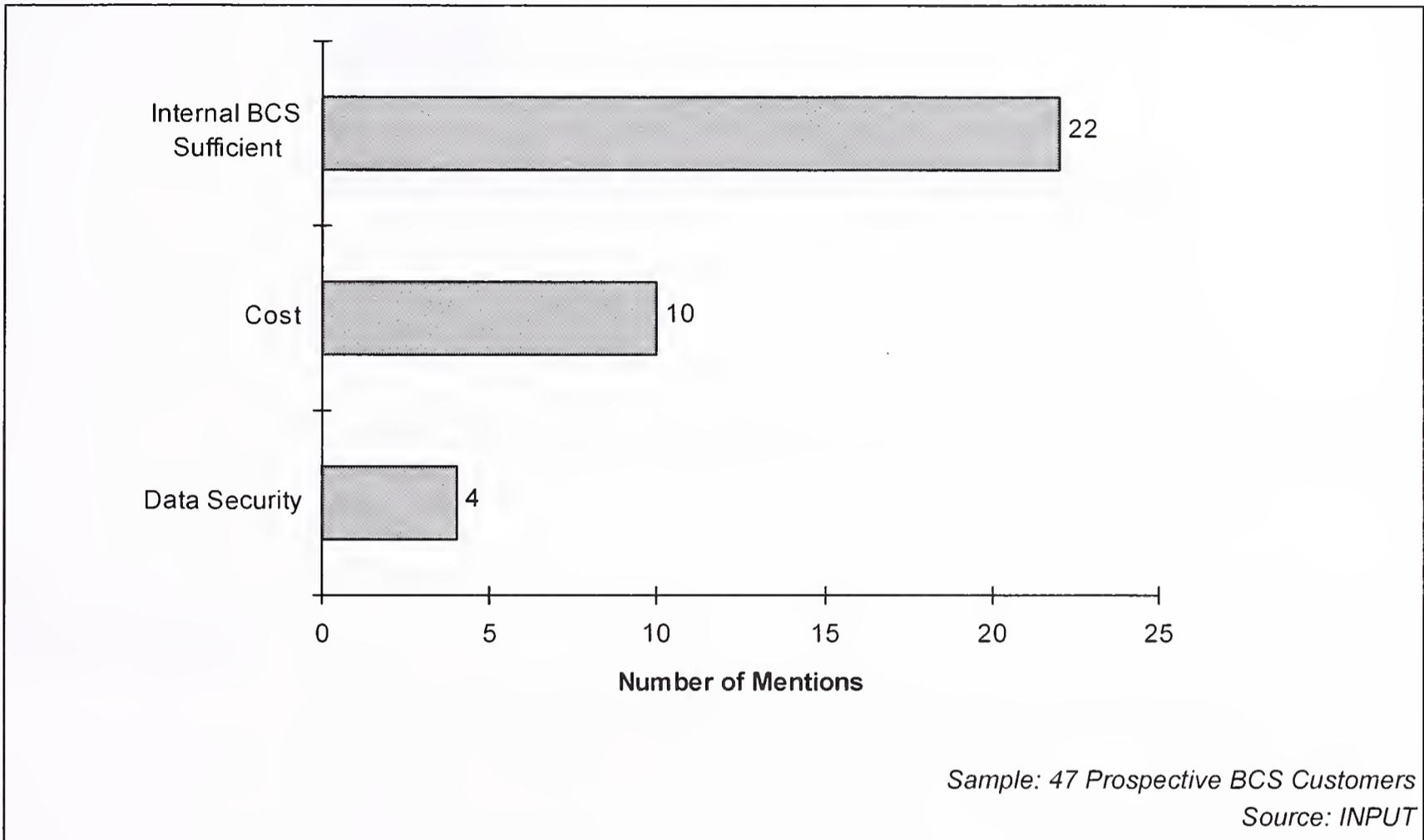
All standby times will fall over the next few years as a result of customer pressure and increased competition in the rapidly growing BCS market.

E

BCS Market Inhibitors

INPUT asked prospective users to indicate why they didn't purchase BCS contracts. Exhibit III-13 reveals that sufficient internal provision was the greatest disincentive to buying BCS contracts.

Exhibit III-13

Reasons For Not Purchasing BCS Contracts

Nearly 50% of U.S. enterprises believe that they have sufficient provision for the continuity of their businesses. For this reason, many enterprises do not believe that it is necessary for them to purchase BCS contracts from an external vendor. However, many enterprises are not fully aware of the consequences of an interruption to their businesses and in fact do not have adequate protection against interruptions.

Furthermore, many businesses perceive physical threats as something to be dealt with by insurance and logical threats as the responsibility of IT vendors. Many do not realise that insurance will only cover expenses caused by downtime and will not protect against lost business.

The average cost of a BCS contract in the United States is approximately \$60,000 annually. However, there is wide variation in BCS costs. Some businesses spend less than \$5,000 on BCS while others spend millions.

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IV

Industry And Competition

This chapter analyses the BCS industry and analyses user perceptions of BCS vendors.

A

BCS Players

Until recently, business continuity services were essentially reactive services. Several specialist disaster recovery vendors emerged such as Comdisco and Sungard. These vendors typically focused on offering the physical environment that was necessary to enable business processes to continue in the event of a disruptive incident. Additionally, they tended to offer recovery expertise in specific types of proprietary hardware and software.

Most major systems vendors such as IBM, H-P and Digital offered business continuity services centered around their own equipment and enjoyed success in the market. Some professional service vendors also entered the fray attempting to leverage their consultancy expertise.

However, as IT underpins an increasing proportion of mission critical business processes, enterprises seek a more proactive approach to ensuring business continuity. Technology is now available to enable vendors to prevent many logical disasters from occurring in the first place. Users increasingly seek BCS contracts that incorporate traditional reactive business continuity services (disaster recovery services) with proactive services that are designed to maximize availability.

Many BCS vendors now offer services throughout the lifecycle of business environments. Such services are designed to:

- Minimize the risk of disruptive incidents through effective planning

- Ensure that business environments are implemented in a manner that minimizes the risk of disruptive incidents
- Anticipate disruptive incidents proactively and predictively, and prevent them from occurring where possible
- Use standby recovery facilities if all else fails.

Such services minimize the risk of needing to invoke recovery plans. Many vendors, especially systems vendors such as Digital, H-P and NCR strongly focus on what can be termed as the proactive aspects of BCS.

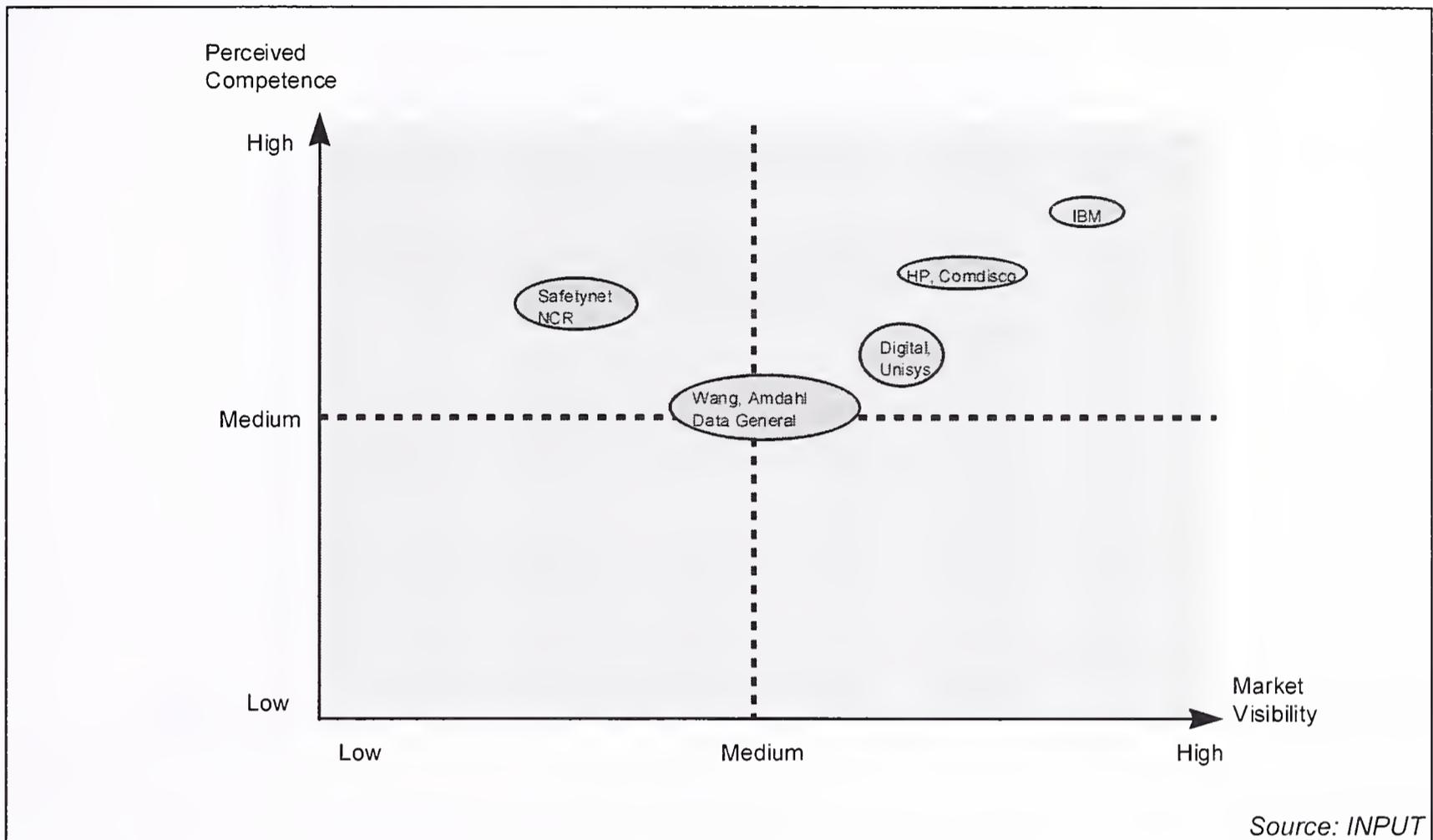
B

Market Positioning

INPUT asked users of BCS to indicate whether or not they are aware of major BCS vendors in the United States. Additionally, BCS customers were asked to indicate their perceptions of the business continuity capabilities of BCS vendors of whom they are aware on a scale of 1 to 5 (where 1 = low capability and 5 = high capability). A score of 3 is taken to represent medium capability; awareness of a vendor's BCS activities by 40% of BCS customers represents medium awareness.

Exhibit IV-1 illustrates user perceptions of major BCS vendors.

Exhibit IV-1

BCS Customers' Perceptions Of BCS Vendors

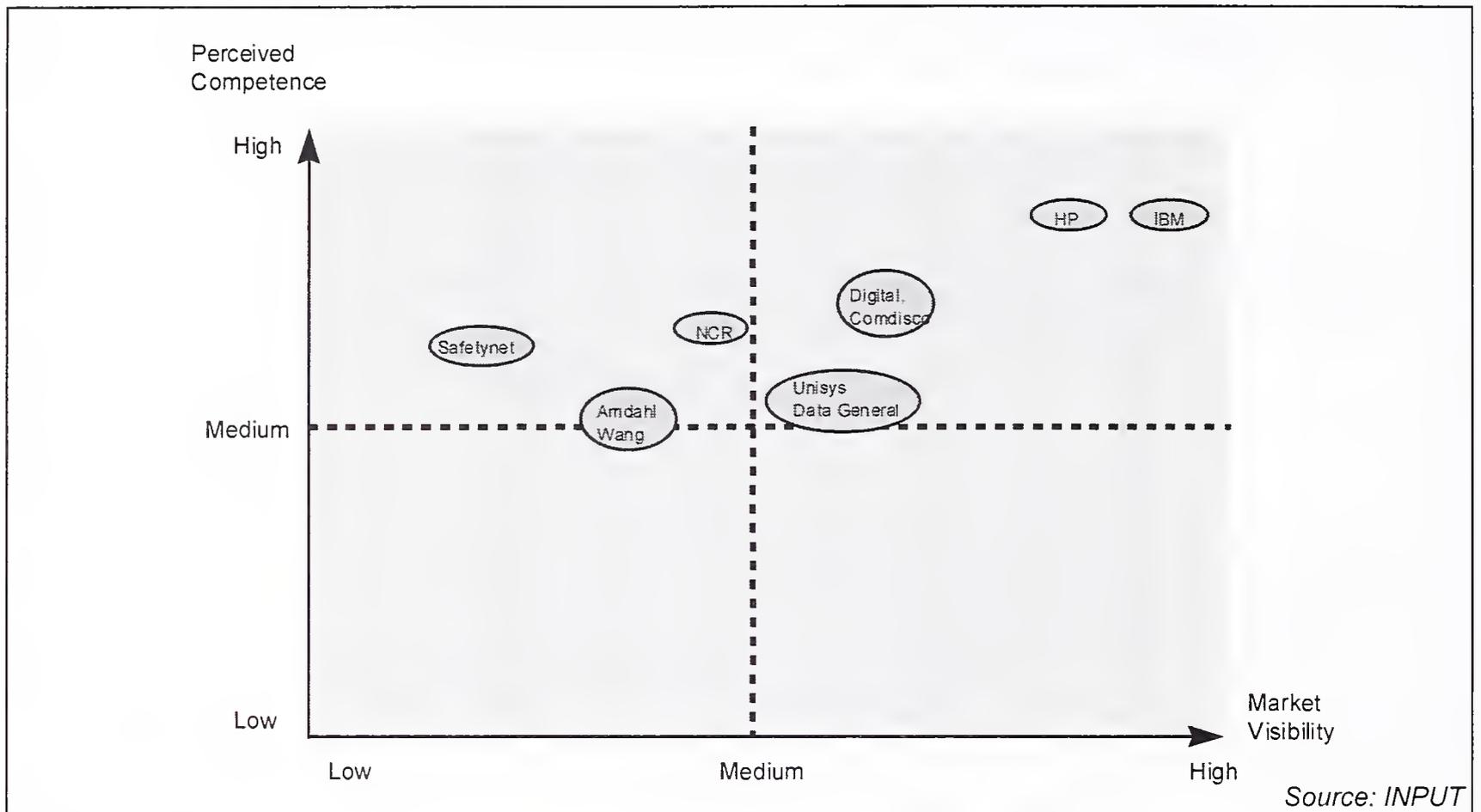
Customers have at least reasonably high regard for the capabilities of most of the BCS vendors of whom they are aware. The largest systems vendors in the U.S., IBM, H-P, and Digital are well placed; they have high market visibility and BCS customers perceive them to be highly capable BCS vendors. BCS specialist Comdisco, is also perceived to be highly capable and has high market visibility.

INPUT also asked prospective users of BCS to indicate their perceptions of the business continuity capabilities of BCS vendors of whom they are aware on a scale of 1 to 5 (where 1=low capability and 5=high capability). A score of 3 is taken to represent medium capability.

Exhibit IV-2 illustrates prospective users' perceptions of major BCS vendors.

Exhibit IV-2

Prospective BCS Customers' Perceptions Of BCS Vendors



Prospective BCS customers in the United States have particularly high regard for the BCS-related capabilities of IBM and H-P.

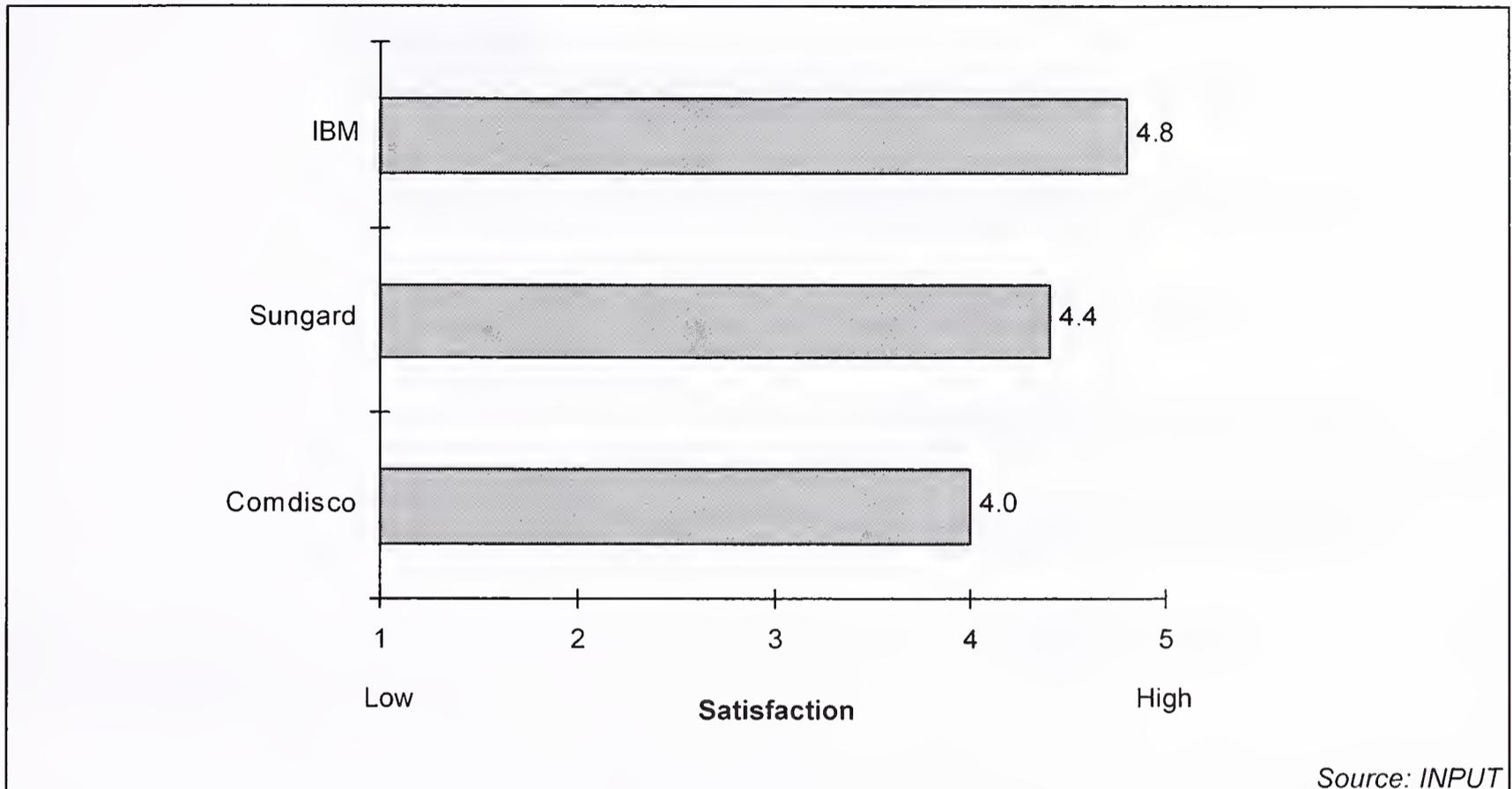
C

Customer Satisfaction With Major BCS Vendors

INPUT asked BCS customers to indicate their levels of satisfaction with their BCS vendor(s) (where 1=very low satisfaction and 5=very high satisfaction).

Exhibit IV-3 shows customer satisfaction levels with major BCS vendors.

Exhibit IV-3

Customer Satisfaction Levels With Major BCS Vendors

The sample sizes are as follows:

- 20 IBM customers
- 20 Sungard customers
- 19 Comdisco customers

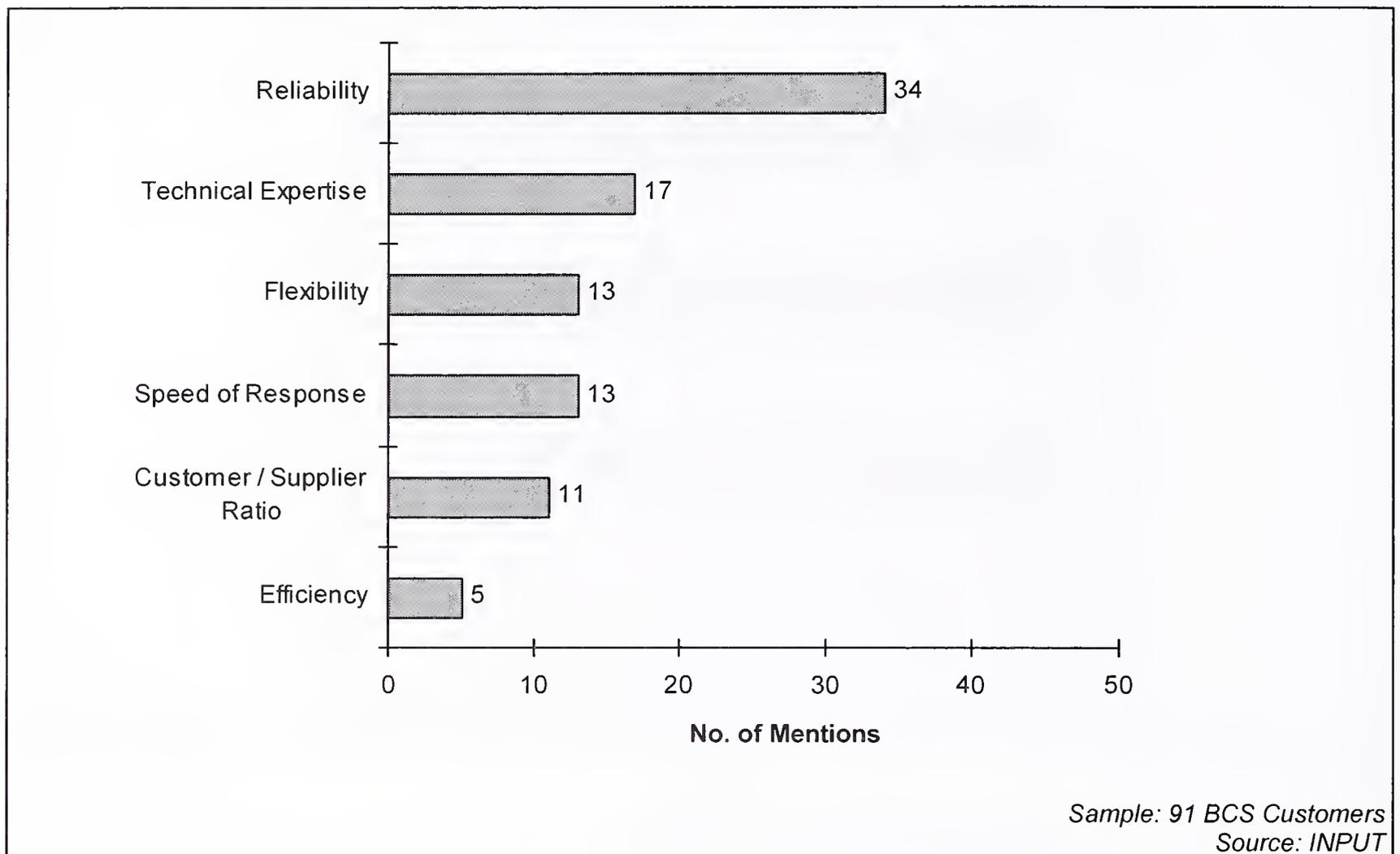
Customer satisfaction levels with all BCS vendors are very high. However a sample of 5 or more only existed for IBM, Sungard and Comdisco. Any score above 3.8 is considered by INPUT to be a good score.

D**Important Vendor Attributes**

INPUT asked BCS customers to indicate what they perceived to be the most important vendor attributes.

Technical expertise and reliability were mentioned most frequently by BCS customers as important vendor attributes (see Exhibit IV-4).

Exhibit IV-4

Important Vendor Attributes



Buyer Behavior

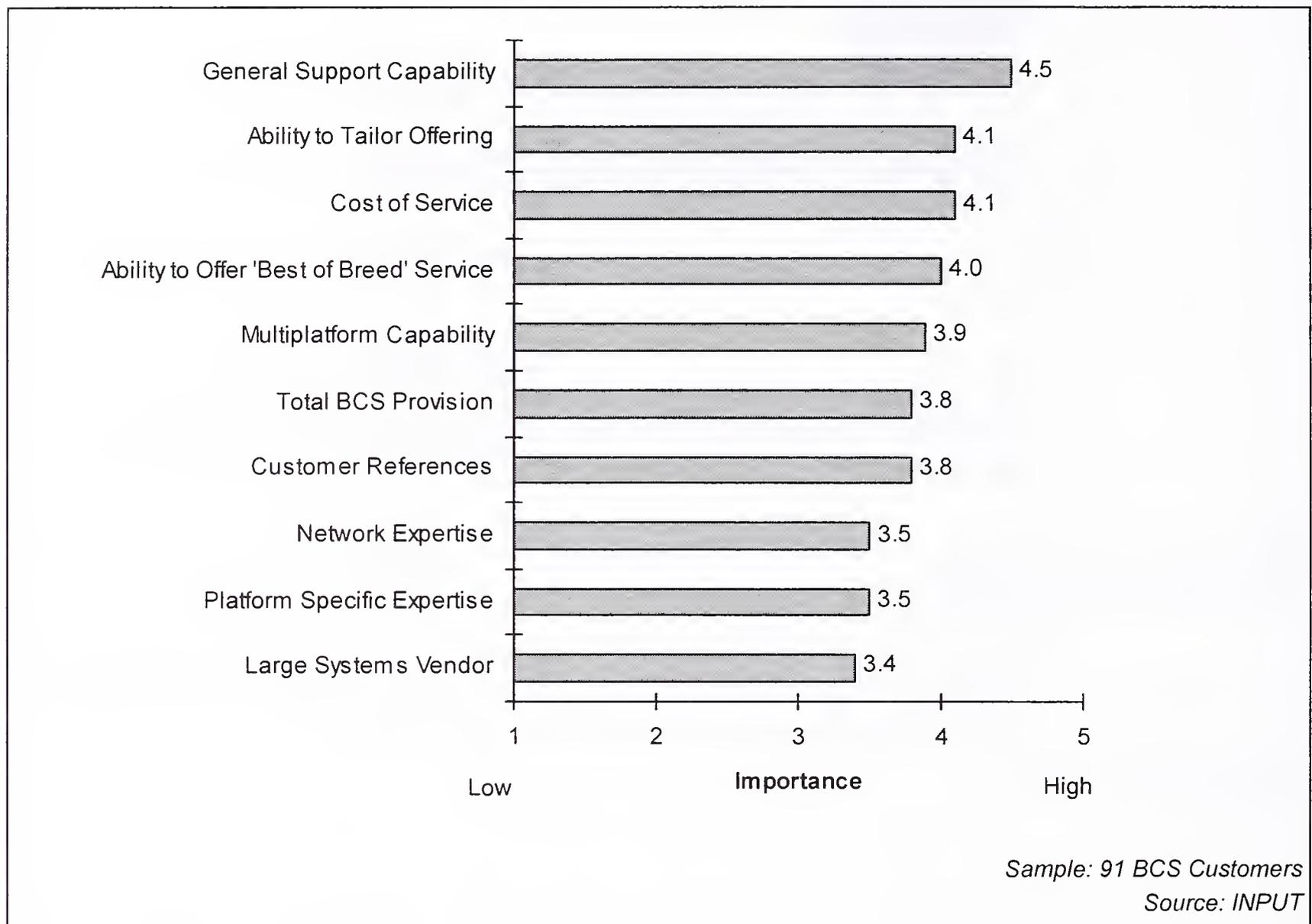
This chapter analyses buyer behavior in terms of selection criteria when seeking business continuity services (BCS), perceived benefits of BCS, satisfaction with BCS and ways in which BCS could be improved.

A

BCS Selection Criteria

INPUT asked BCS customers to indicate the importance of a number of selection criteria when choosing a BCS vendor. Exhibit V-1 illustrates the most important selection criteria to BCS customers.

Exhibit V-1

Major BCS Selection Criteria

The ability to provide support to customers is the most important selection criterion for BCS customers. Customers require vendors to offer a general support capability in terms of both breadth and depth.

The ability to tailor BCS offerings to specific customer requirements is a very important selection criterion for US BCS customers. As IT environments become more complex, each enterprise typically has a unique IT environment which necessitates a flexible approach to services provision from vendors.

The cost of services, the ability to offer 'best of breed' services and multiplatform capability are also important selection criteria.

Additionally, customers seek BCS which are closely linked to their business processes. In other words, they want BCS contracts which can ensure the continuity of their business processes. In order to offer such services, BCS vendors must have a specific understanding of the business

processes in question. Hence, vendors must gain some business process expertise to complement their technical expertise.

Exhibits V-2 to V-4 reveal the five most important selection criteria for three major vertical industries; namely banking and finance, distribution, and manufacturing.

Exhibit V-2

Major BCS Selection Criteria In Banking & Finance

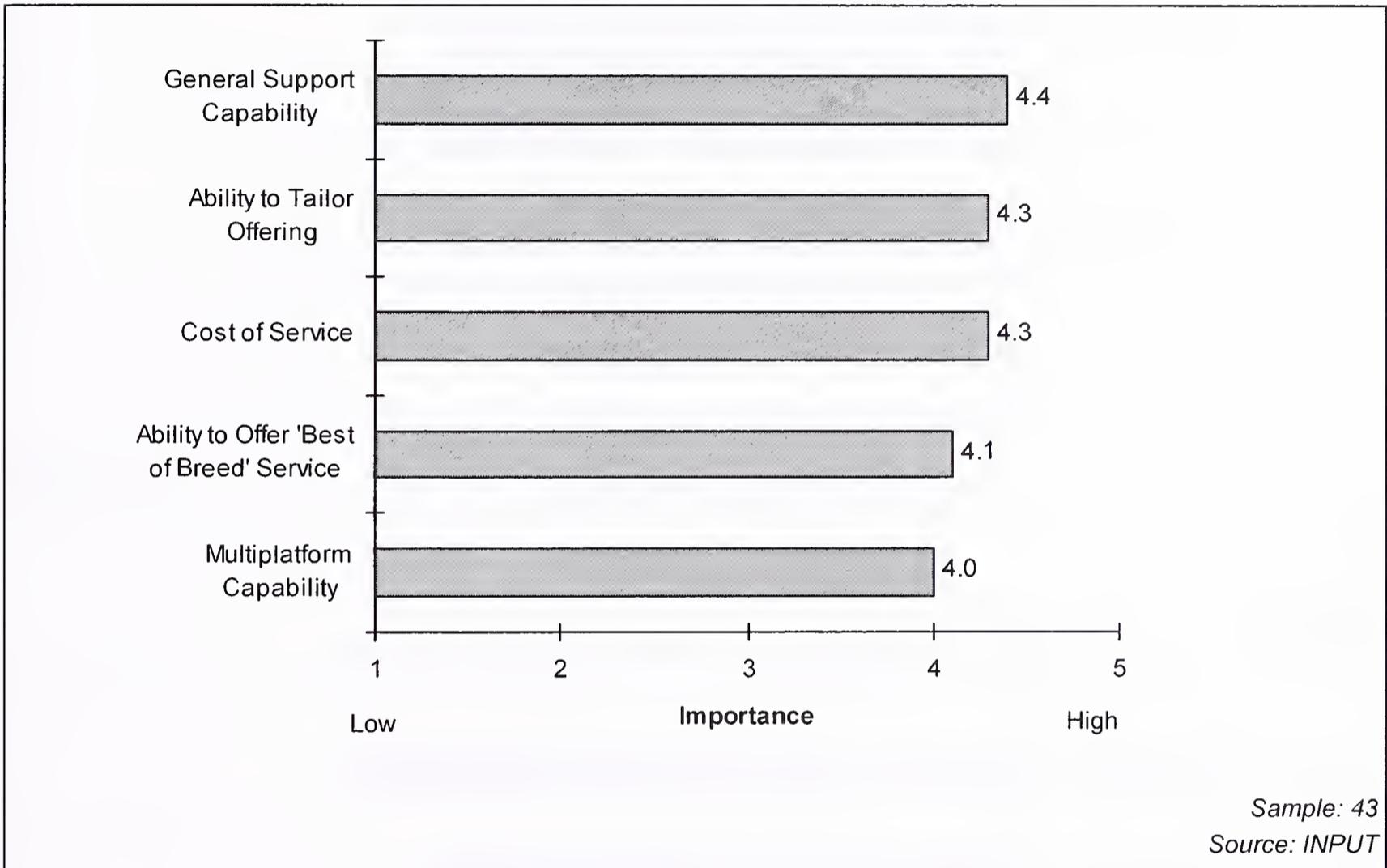


Exhibit V-3

Major BCS Selection Criteria In Distribution

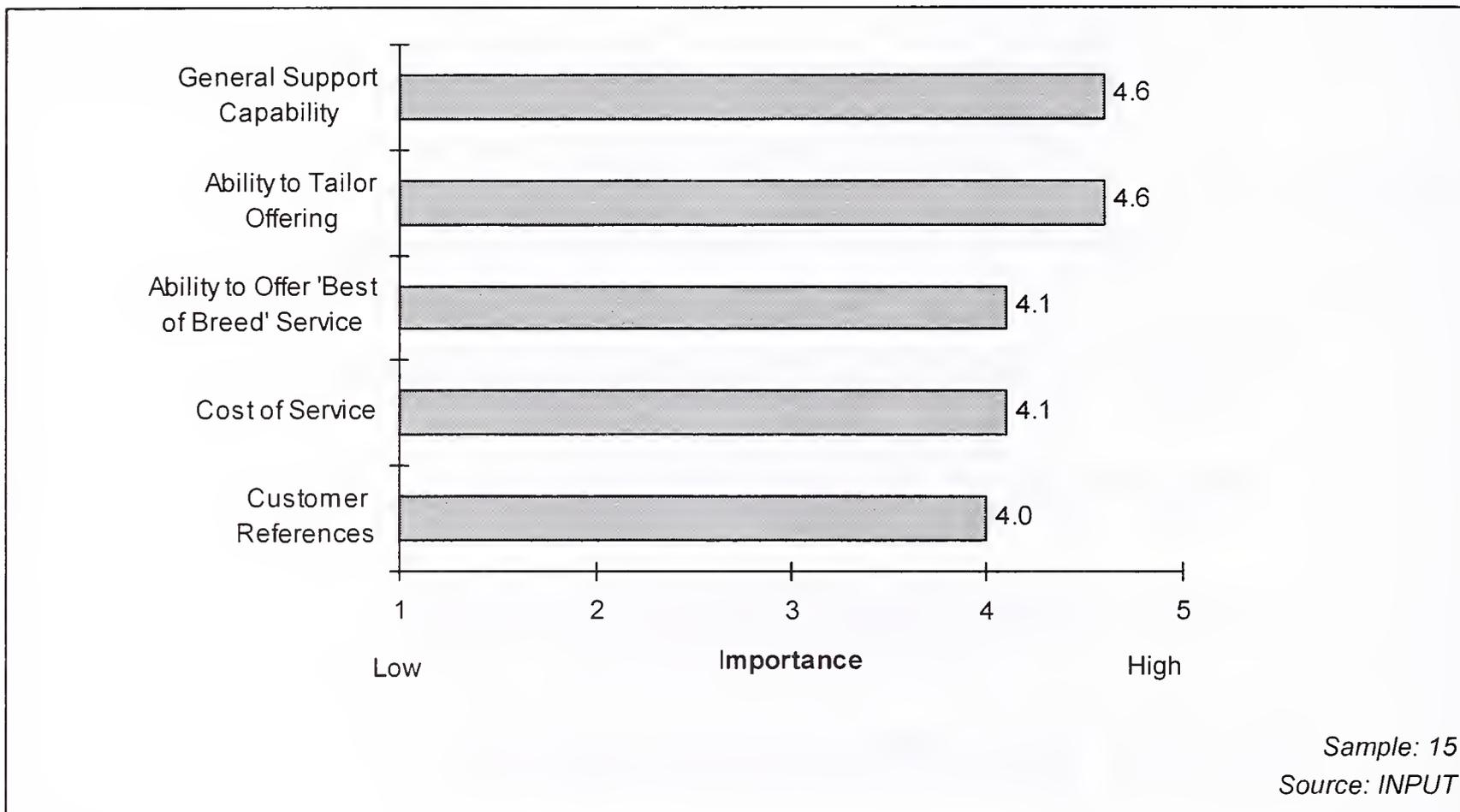
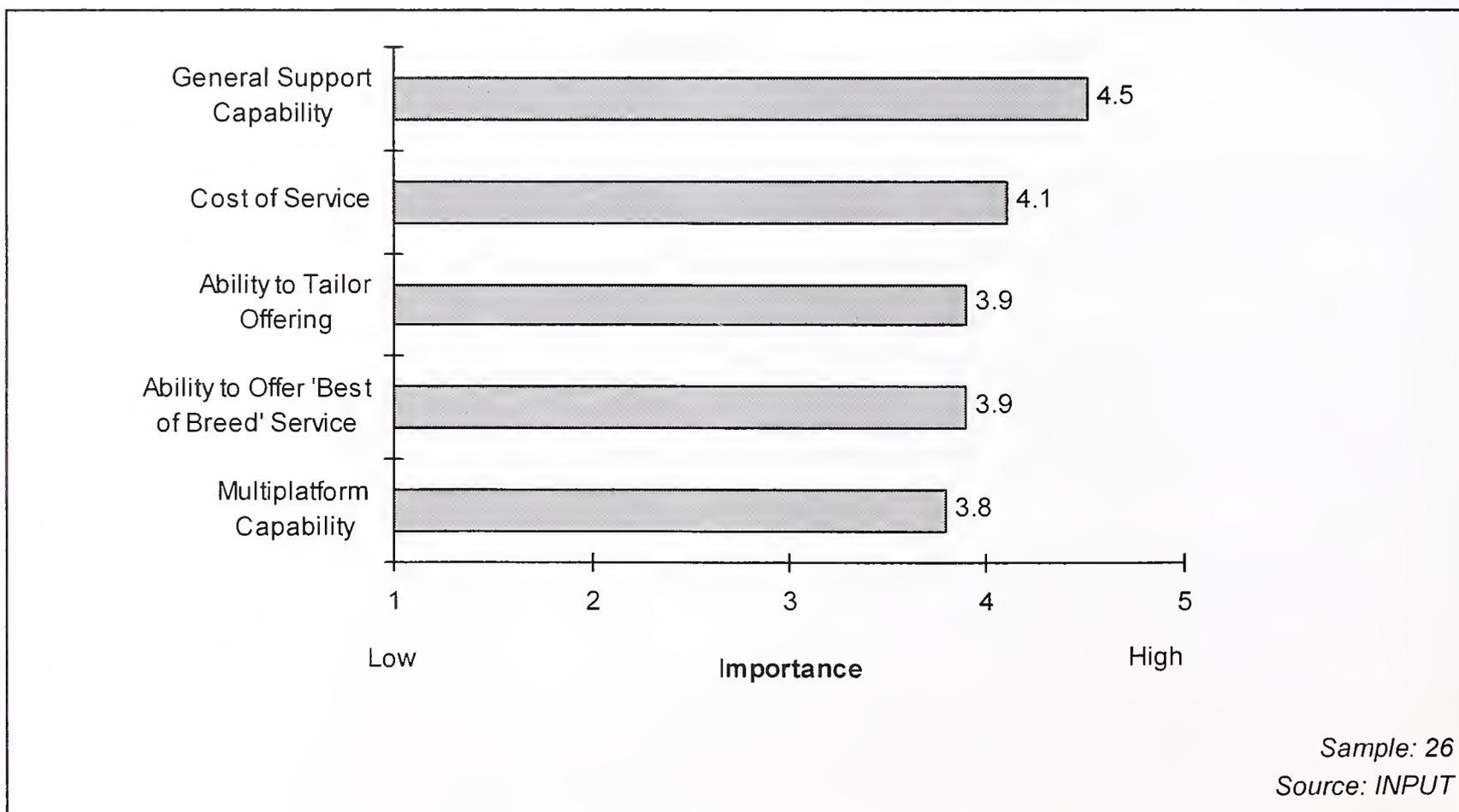


Exhibit V-4

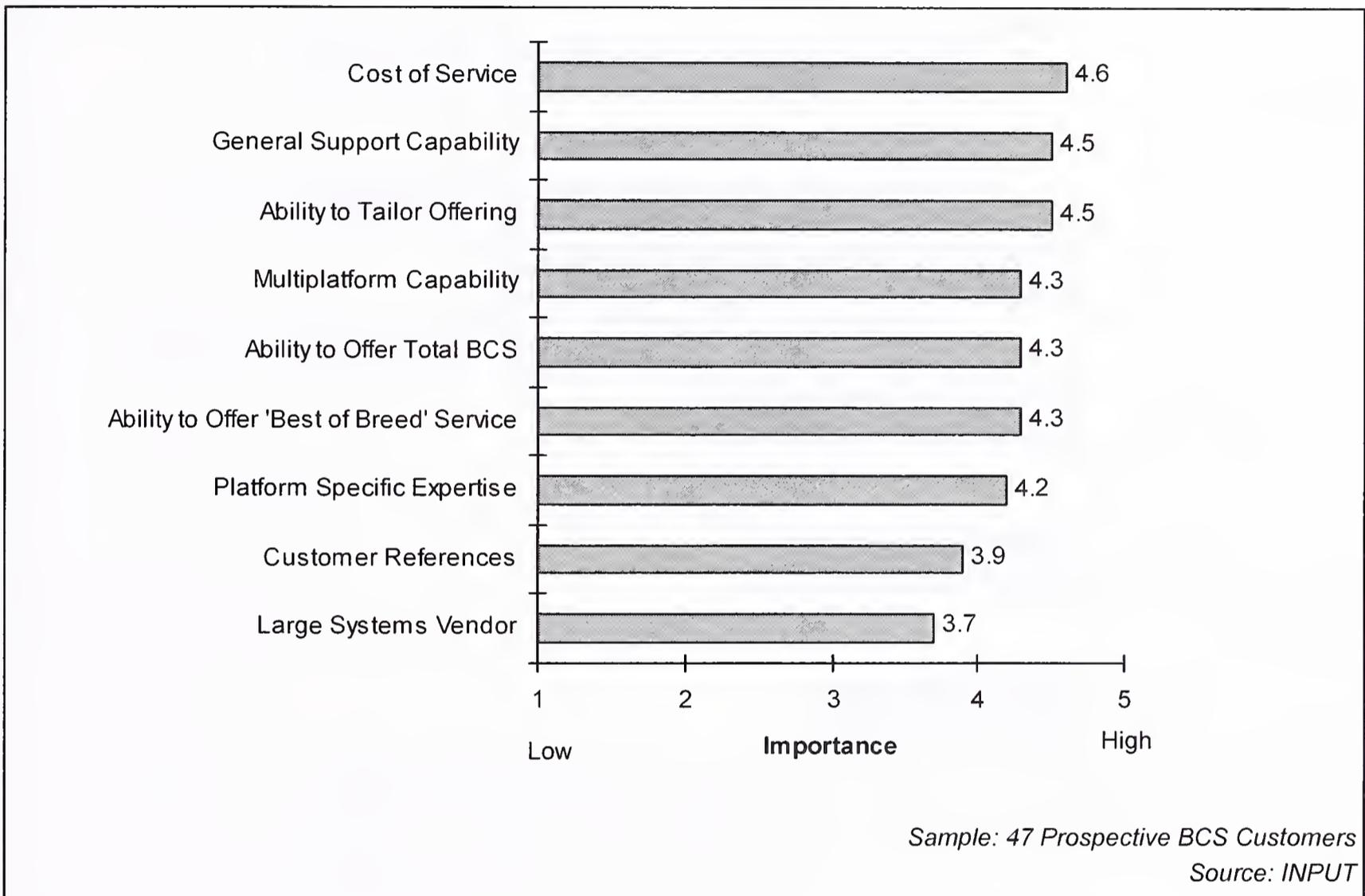
Major BCS Selection Criteria In Manufacturing



INPUT also asked prospective buyers of BCS services to indicate the importance of several vendor selection criteria if they were to purchase a BCS contract. Exhibit V-8 illustrates the importance of several selection criteria to prospective BCS buyers.

Exhibit V-5

BCS Selection Criteria For Prospective Users

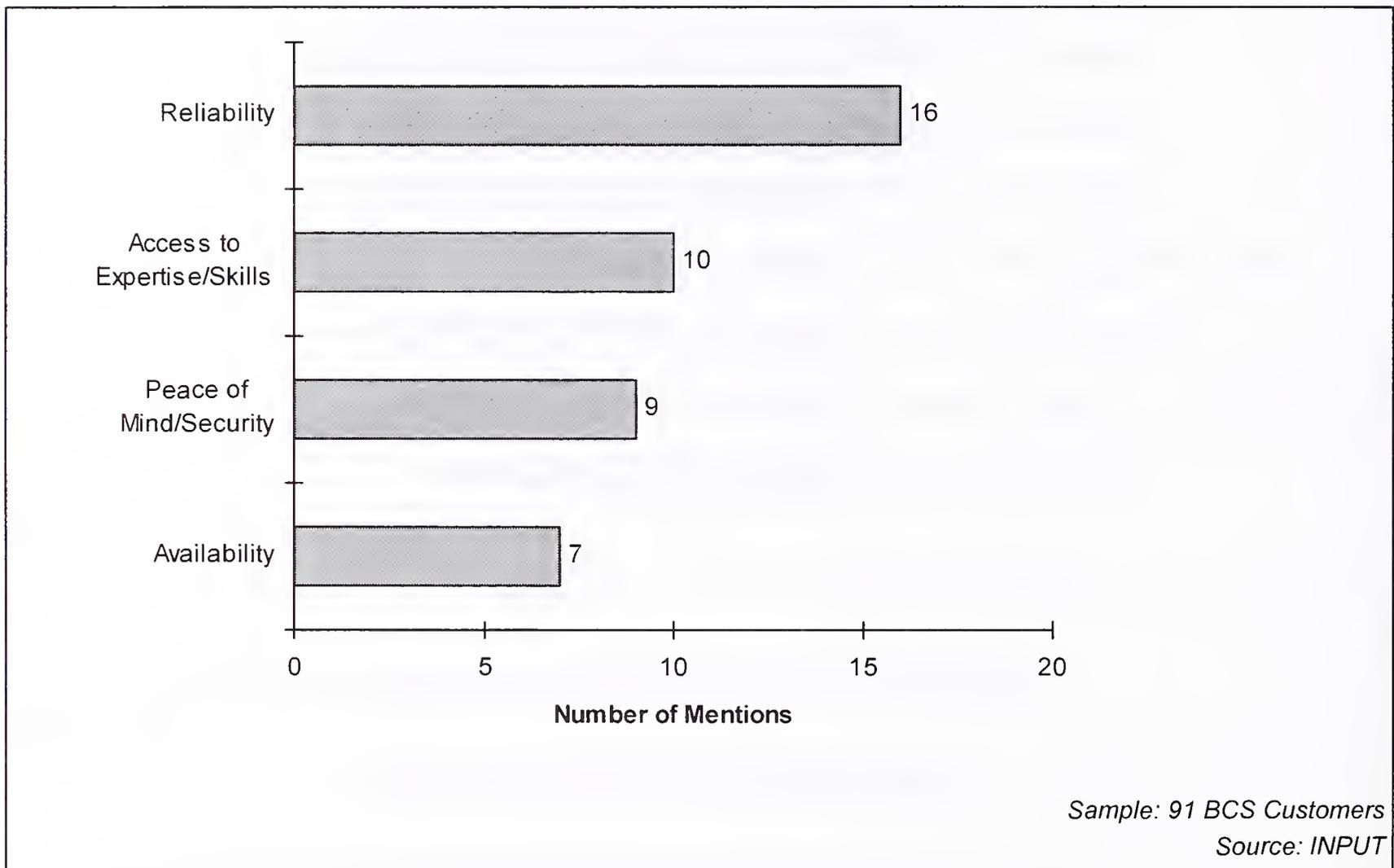


Prospective BCS customers and BCS customers perceive broadly the same selection criteria to be the most important. However, importance levels are higher for prospective buyers than for existing customers. In particular the cost of the service is given a very high importance rating by prospective BCS customers.

B**Benefits Of BCS**

INPUT asked BCS customers to indicate reasons for purchasing BCS contracts. Exhibit V-6 illustrates the reasons which were most commonly mentioned by customers when they were asked to indicate the three main benefits of BCS.

Exhibit V-6

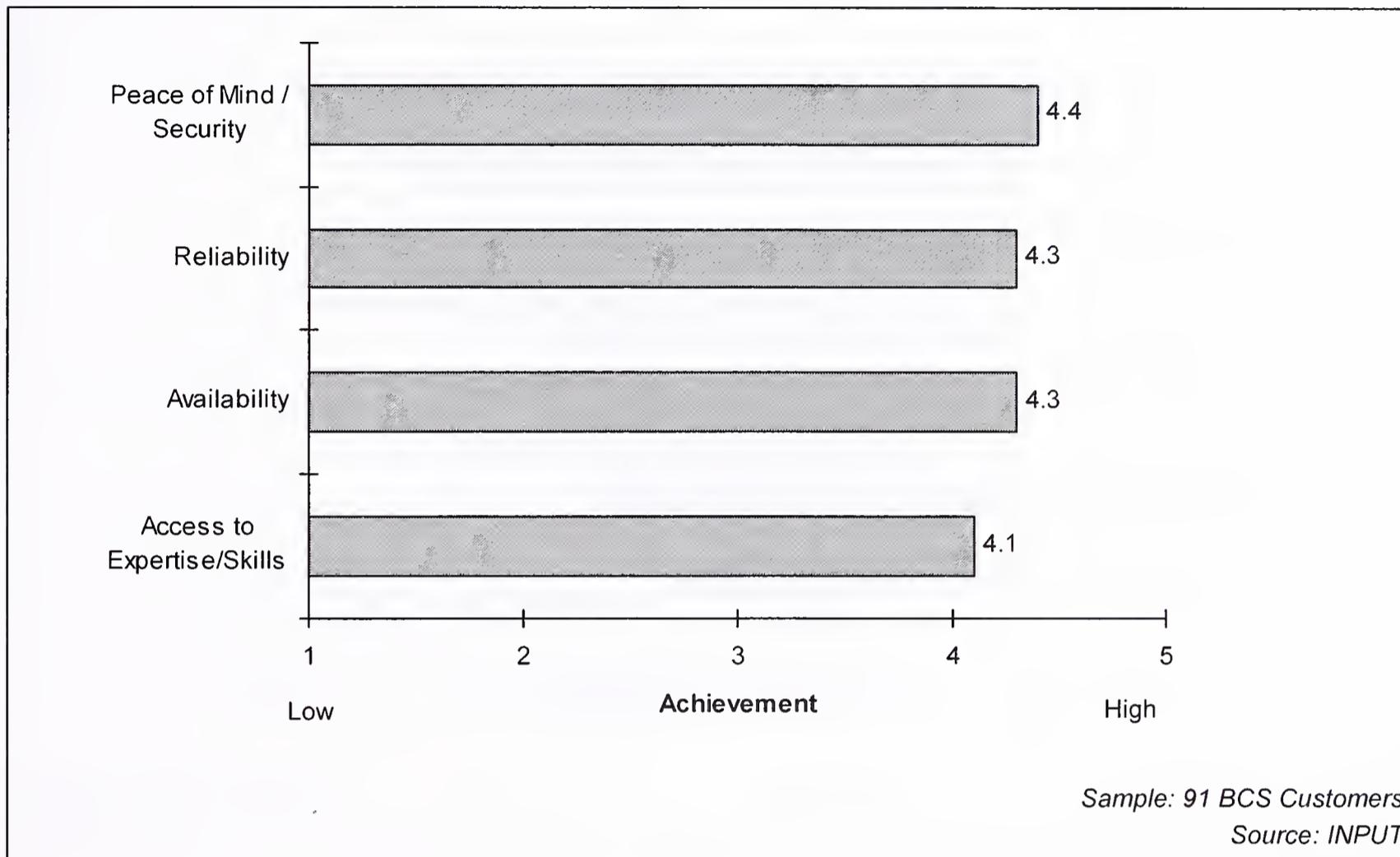
Major Benefits Of BCS Services

Reliability emerges as the major benefit associated with BCS services by U.S. businesses. Access to expertise and skills and peace of mind are commonly mentioned benefits of BCS services. The use of BCS to maximize availability is also mentioned by a significant number of BCS customers.

Exhibit V-7 illustrates the extent to which BCS customers believe that benefits associated with BCS have been achieved.

Exhibit V-7

Extent To Which Benefits Have Been Achieved



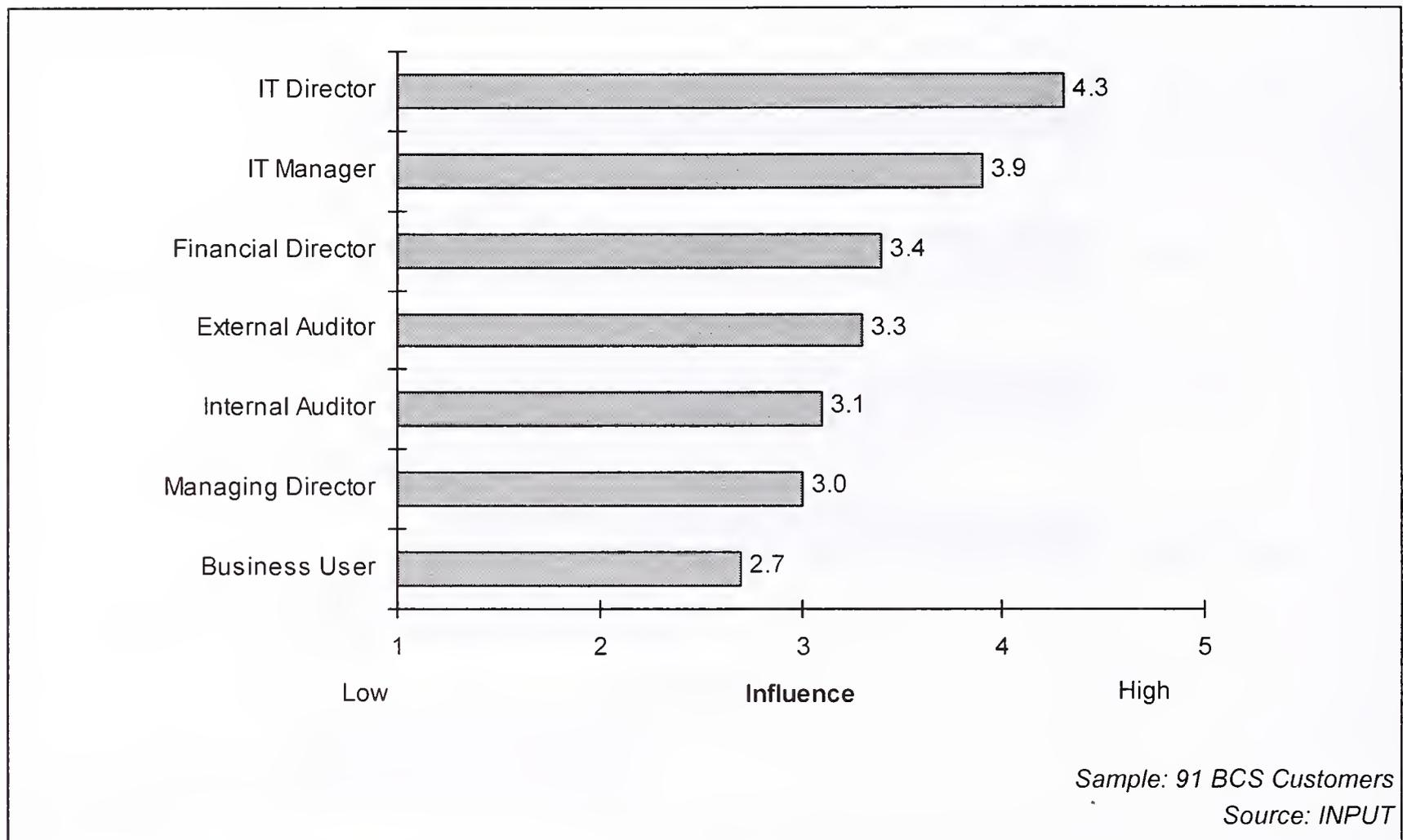
BCS customers believe that business continuity services achieve the desired goal of offering them access to business continuity skills and expertise. Peace of mind and a feeling of security are also broadly achieved by BCS.

C

Decision Makers

INPUT asked BCS customers to indicate the influence of several decision makers on the decision to purchase BCS. Exhibit V-8 illustrates the influence of key decision makers on BCS purchases.

Exhibit V-8

The Influence Of Key Decision Makers On BCS Purchases

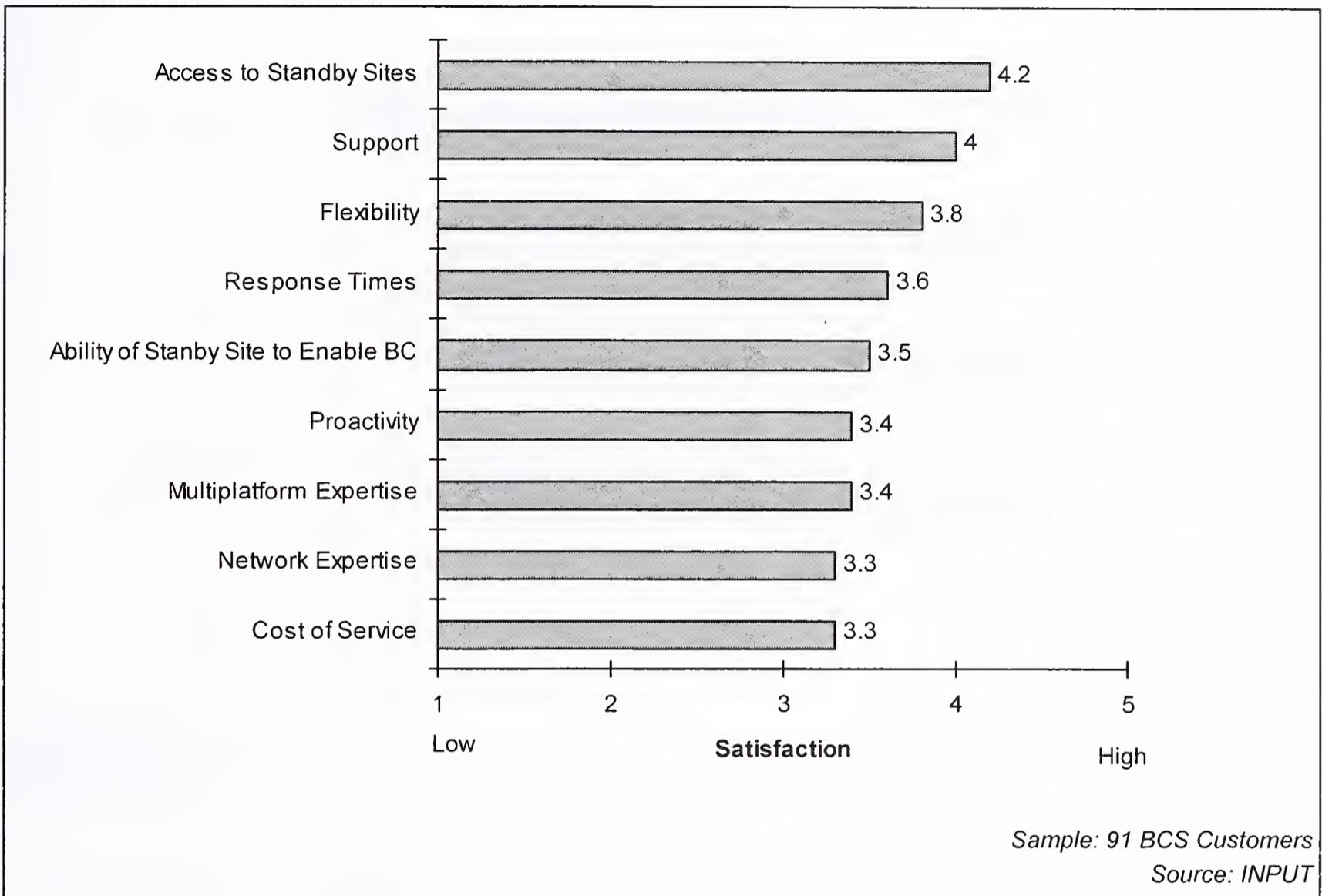
Perhaps surprisingly, IT Directors and IT Managers are the chief decision makers for BCS purchases. Finance Directors also have a significant amount of influence. Business users continue to have relatively little influence on BCS purchasing decisions. This is likely to change in the near future. As IT and business processes become indistinguishable, business users can be expected to have greater influence on such purchasing decisions.

D**BCS Satisfaction**

INPUT asked BCS customers to indicate their levels of satisfaction with ten BCS features. Exhibit V-9 illustrates customer satisfaction levels with each feature.

Exhibit V-9

Customer Satisfaction With BCS Features



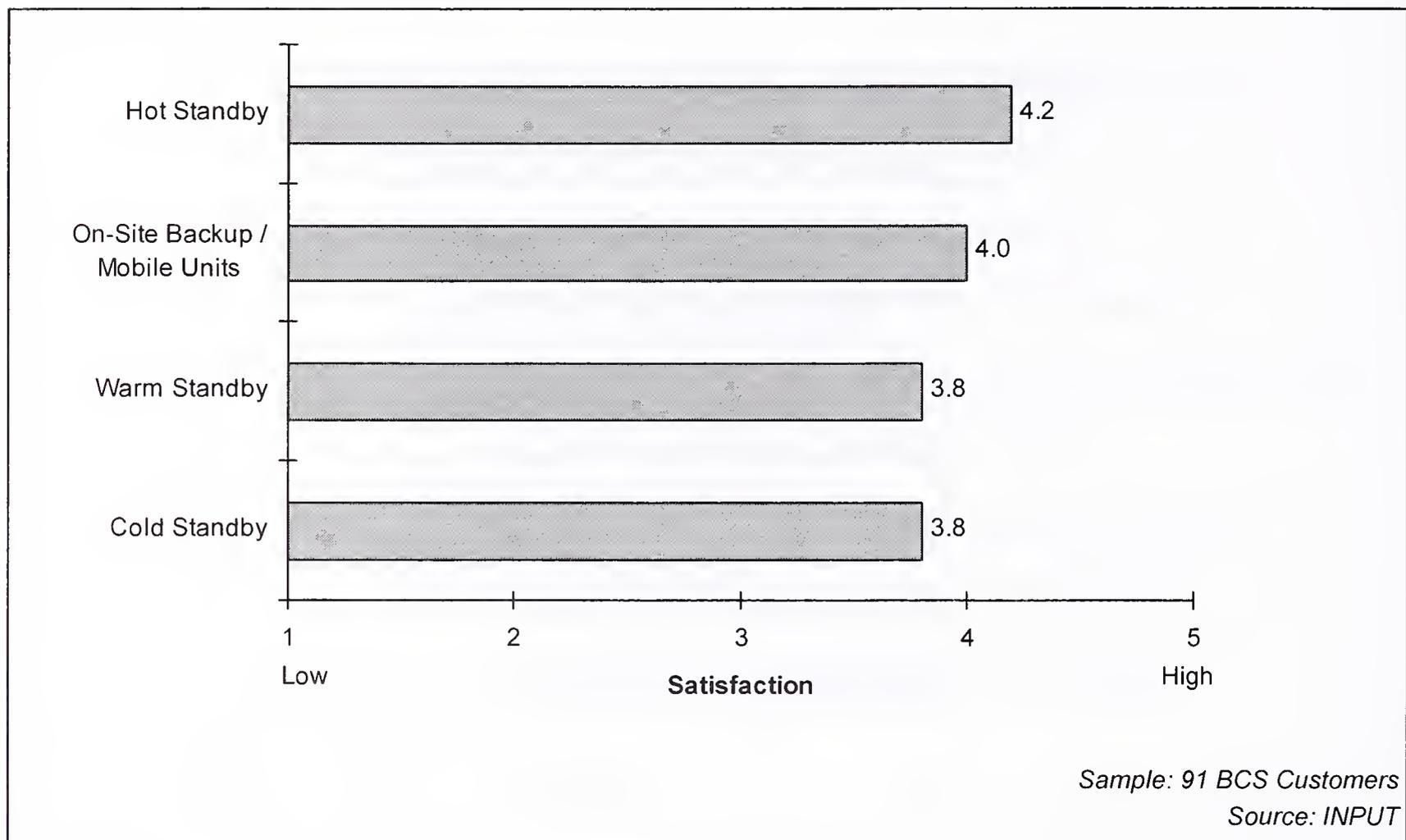
Customers exhibited high satisfaction levels with access to standby sites, flexibility and support. However, customers are concerned with the cost of BCS and the ability of vendors to offer truly multiplatform BCS and offer network expertise. Many BCS offerings focus on specific platforms and few BCS vendors can boast expertise across all platforms and networks.

INPUT asked BCS customers to indicate their levels of satisfaction with specific disaster recovery (DR) service types.

DR services can be defined as services that keep a business running in the event of a major incident which temporarily puts its operations completely out of action. Service types include backup services, and the provision of standby sites.

Exhibit V-10 reveals that satisfaction levels for all DR service types are high.

Exhibit V-10

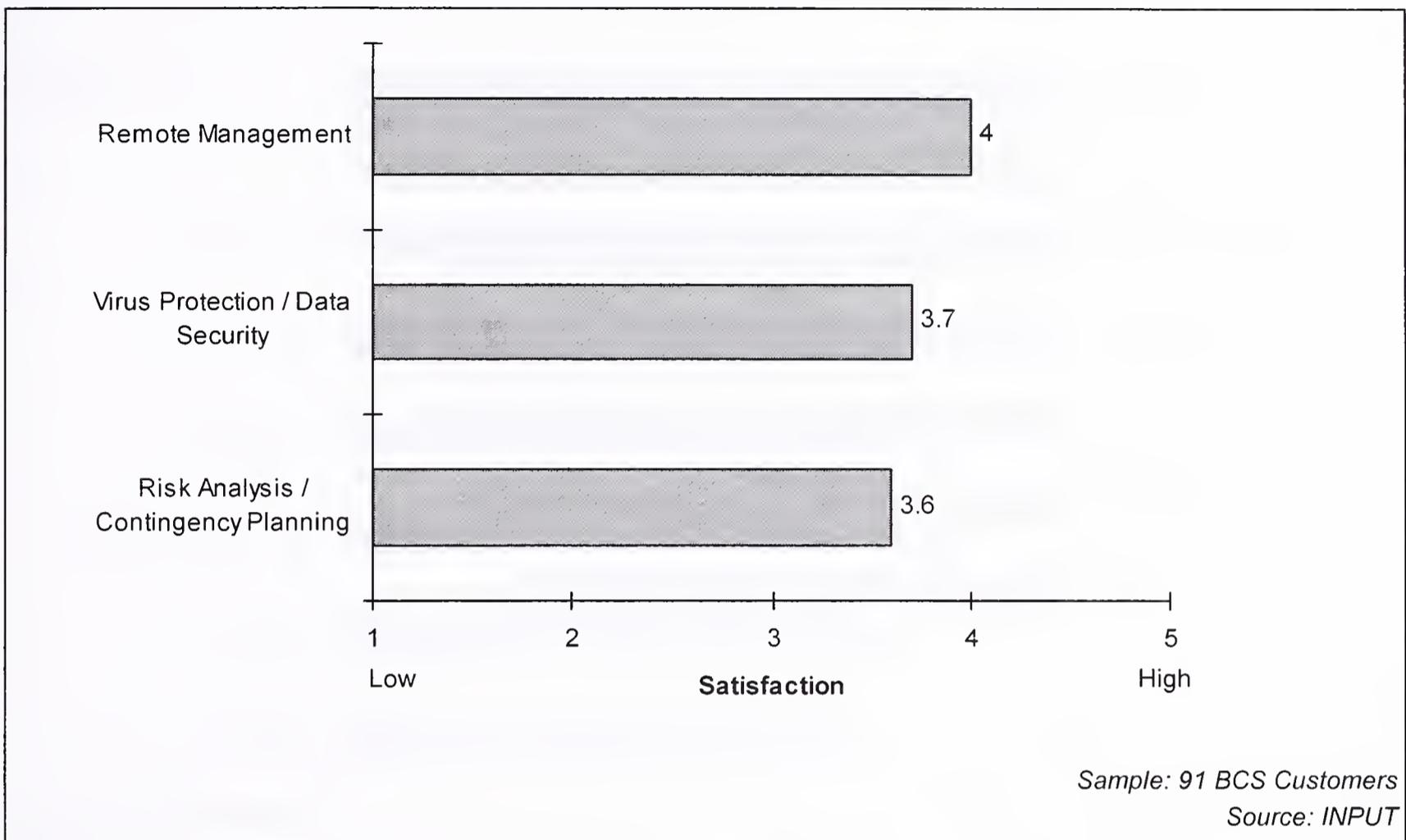
Customer Satisfaction With DR Service Types

Additionally, INPUT asked customers to indicate their satisfaction levels with proactive BCS types.

Proactive business continuity services can be defined as services which seek to prevent disruptive incidents from taking place or enable users to deal with the consequences of disruptive incidents more effectively. Typical service types include remote management services and contingency planning.

Exhibit V-11 reveals that satisfaction levels are also high for proactive BCS.

Exhibit V-11

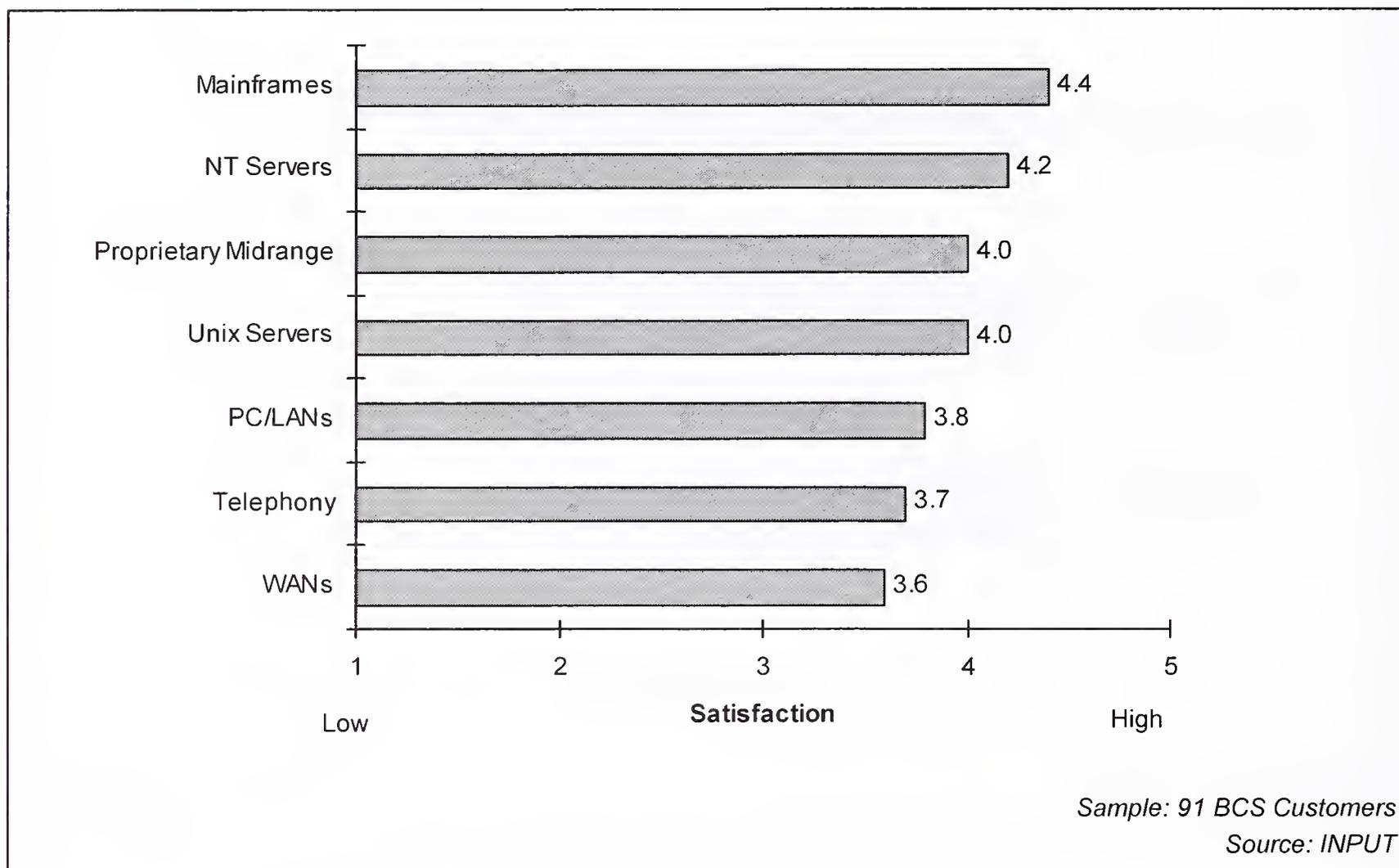
Customer Satisfaction With Proactive BCS Types

INPUT's research indicates that there is considerable scope for improvement in the provision of risk analysis/contingency planning services. BCS suppliers must ensure that they have an adequate understanding of customers' businesses in order to be able to offer real value in risk analysis and contingency planning services..

INPUT asked DR customers to indicate their levels of satisfaction with DR services for specific platforms. Exhibit V-12 shows customer satisfaction with DR services different platforms.

Exhibit V-12

Satisfaction With DR Services By Platform



Distributed computing is becoming increasingly important. For this reason, the focus of DR is shifting away from platform specific DR provision to enterprise wide DR provision.

Mainframes and datacentres have until recently been responsible for the vast majority of mission critical IT activity. Hence, for many years, DR specialists have focused their efforts on the recovery of mainframe/datacentre environments. As one would expect, customers express the highest levels of satisfaction with DR services for mainframe/datacentre environments.

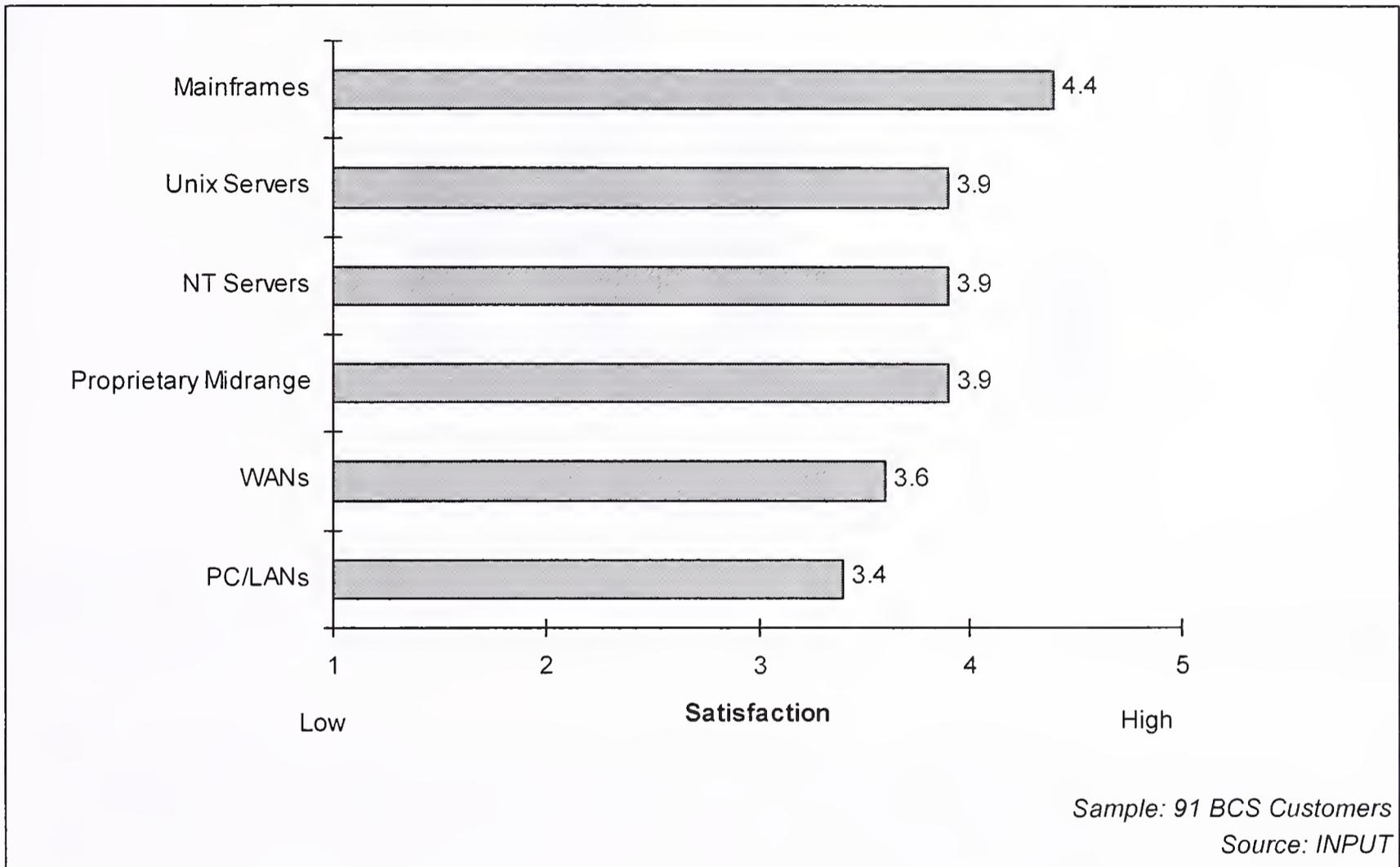
Customer satisfaction with DR services for NT, Unix and proprietary midrange platforms are also high. This bodes well for DR vendors given that an increasing amount of mission critical activity takes place on NT and Unix platforms.

However, there is room for improvement with BCS services for increasingly important WANs. Higher satisfaction levels will become necessary for WANs as enterprises increasingly depend on WANs for mission critical activity.

INPUT asked proactive BCS customers to indicate their levels of satisfaction with proactive BCS for specific platforms. Exhibit V-13 shows customer satisfaction with proactive BCS on different platforms.

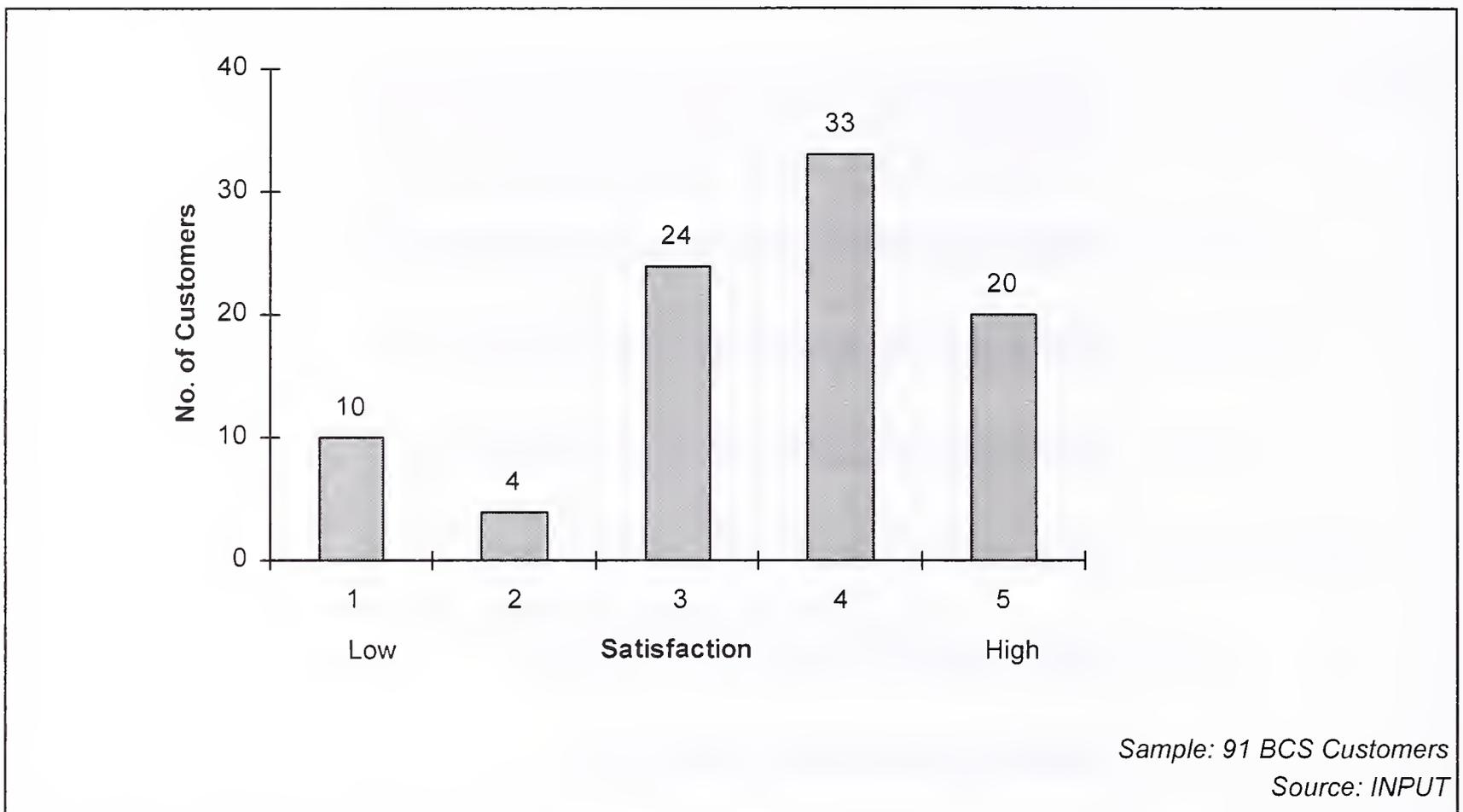
Exhibit V-13

Satisfaction With Proactive BCS By Platform



INPUT asked BCS customers to indicate their levels of satisfaction with the workspace with which they will be provided by vendors in the event of a disaster. Exhibit V-14 reveals customer satisfaction levels with workspace provision.

Exhibit V-14

User Satisfaction With Alternative Workspaces

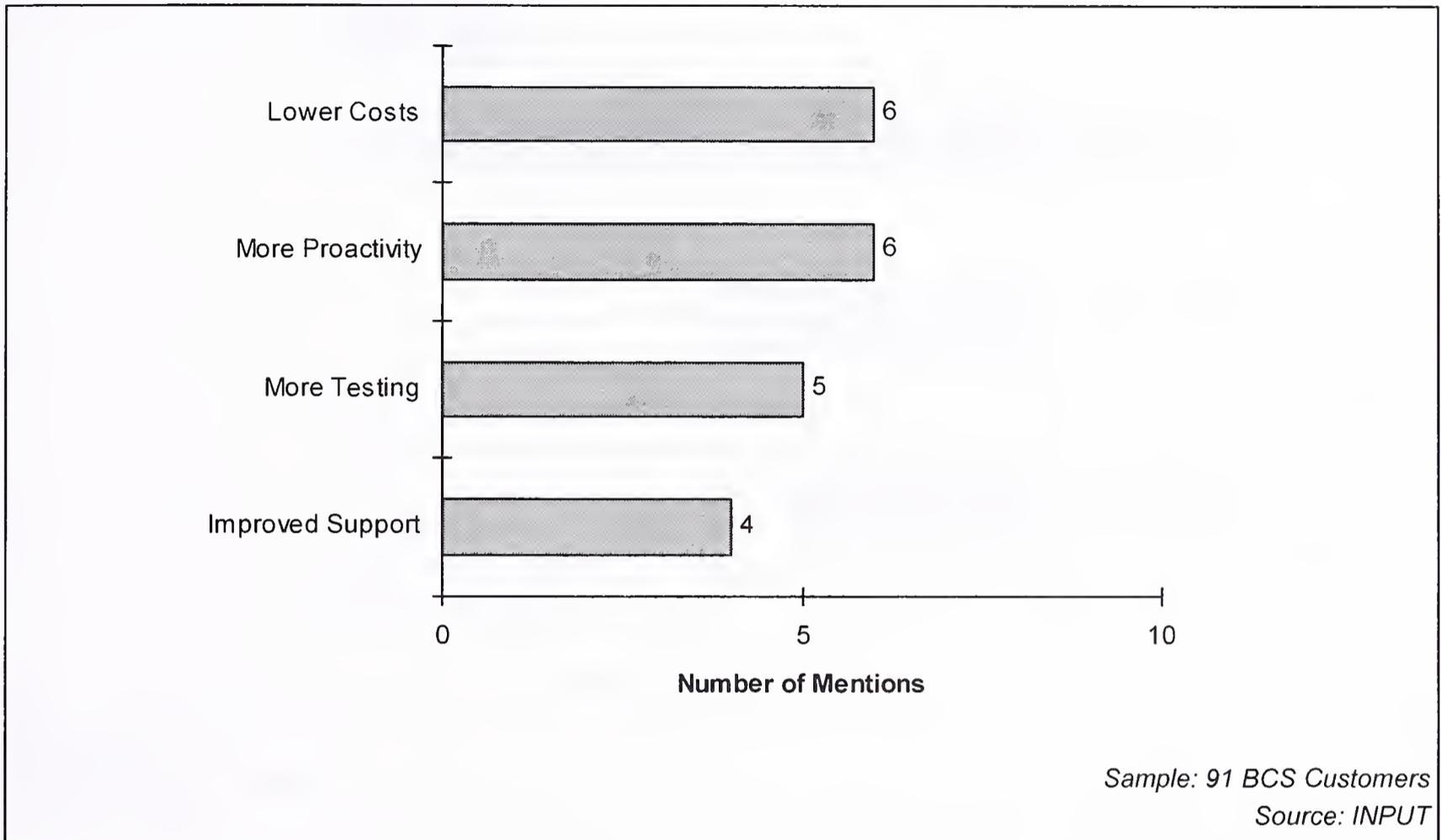
Interestingly, over 15% of BCS customers expressed extremely low levels of satisfaction with their alternative workspace. Customers expressed concern relating to the size of the workspace and its functionality. Some customers also believe that the ratio of subscribers to workspace is too high.

However, nearly 60% of BCS customers expressed high levels of satisfaction with their alternative workspaces.

E**BCS Improvements**

INPUT asked BCS customers to indicate the ways in which they believed that their BCS could be improved. Exhibit V-15 shows the most commonly mentioned ways in which users believe that BCS could be improved.

Exhibit V-15

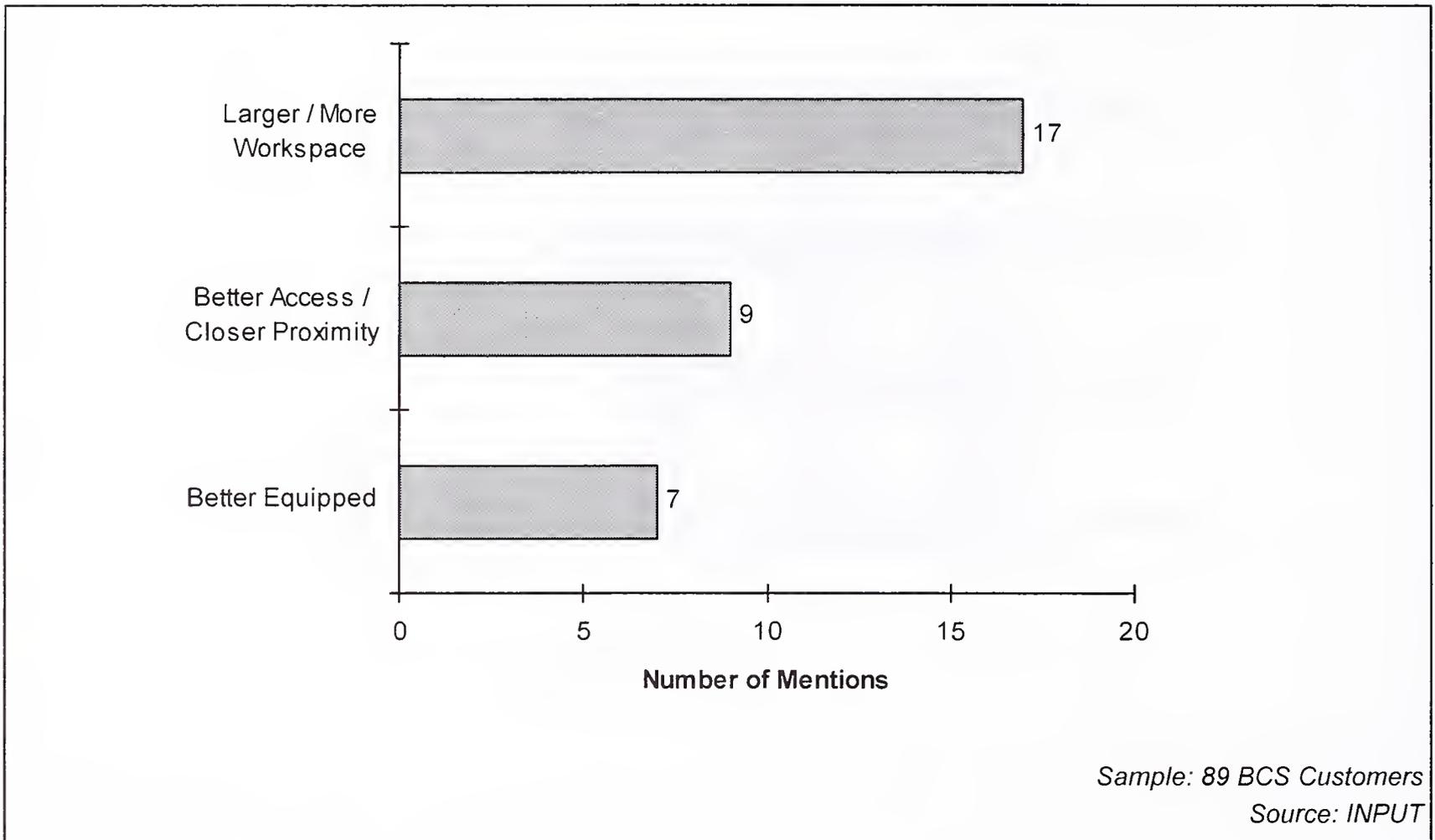
BCS Improvements

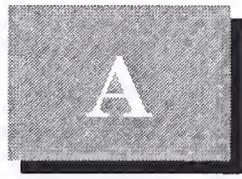
Lowering BCS costs is the main way in which vendors could improve their services in the eyes of the user community. A significant number of enterprise users state unprompted that vendors could improve BCS by adopting a more proactive approach. Such an approach might involve anticipating the interruption of business processes and taking action to prevent any interruption from taking place unbeknown to the customer.

When asked to indicate ways in which alternative workspaces could be improved, accessibility and size were mentioned most frequently. Additionally, a significant number of users believe that their alternative workspaces are do not contain all the necessary equipment to meet their needs. Exhibit V-16 shows the major ways in which users believe that their alternative workspaces could be improved.

Exhibit V-16

Alternative Workspace Improvements





BCS Customer Perceptions

This appendix illustrates the perceptions of services vendors held by 91 business continuity services (BCS) customers in the United States.

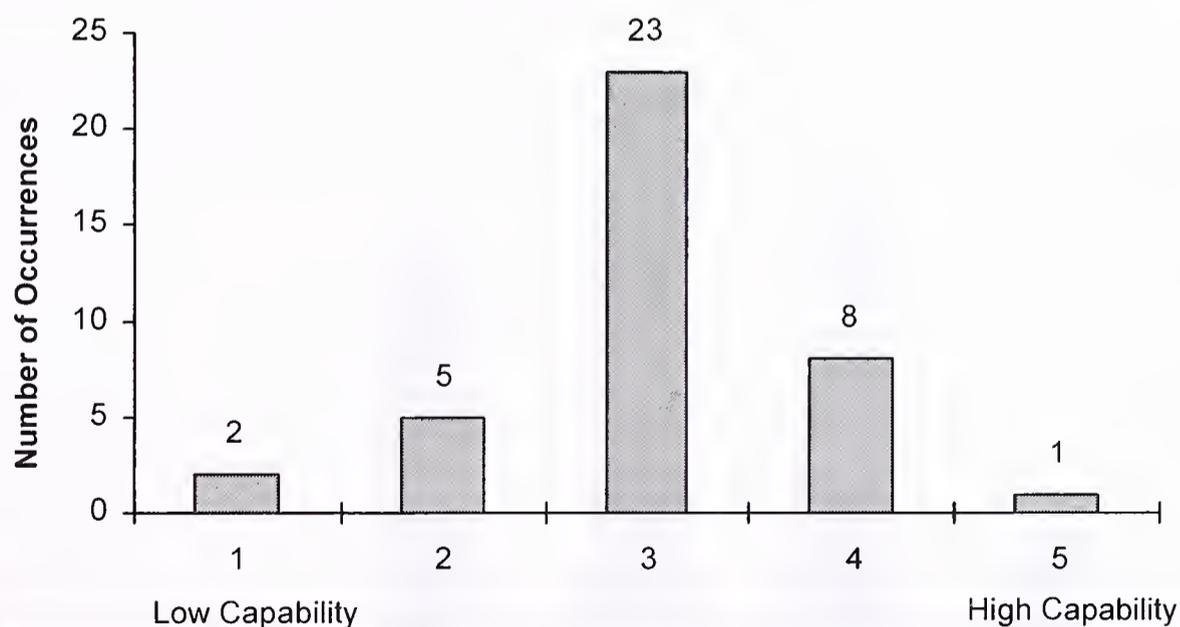
Customers were asked to indicate their perceptions of the capability of a number of vendors as BCS suppliers where 1 = low capability and 5 = high capability.

A

Amdahl

39 interviewees are aware of the BCS activities of Amdahl.

Exhibit A-1



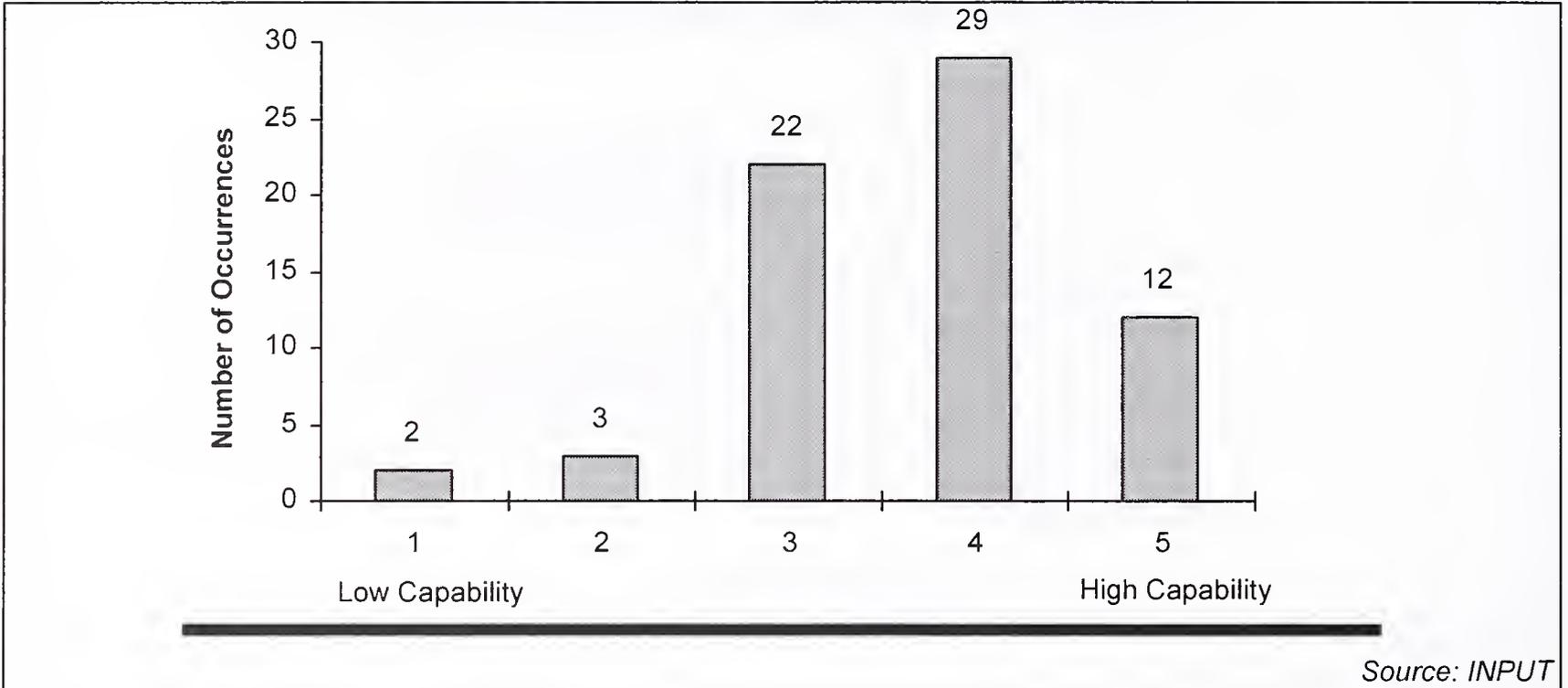
Source: INPUT

B

Comdisco

68 interviewees are aware of the BCS activities of Comdisco.

Exhibit A-2

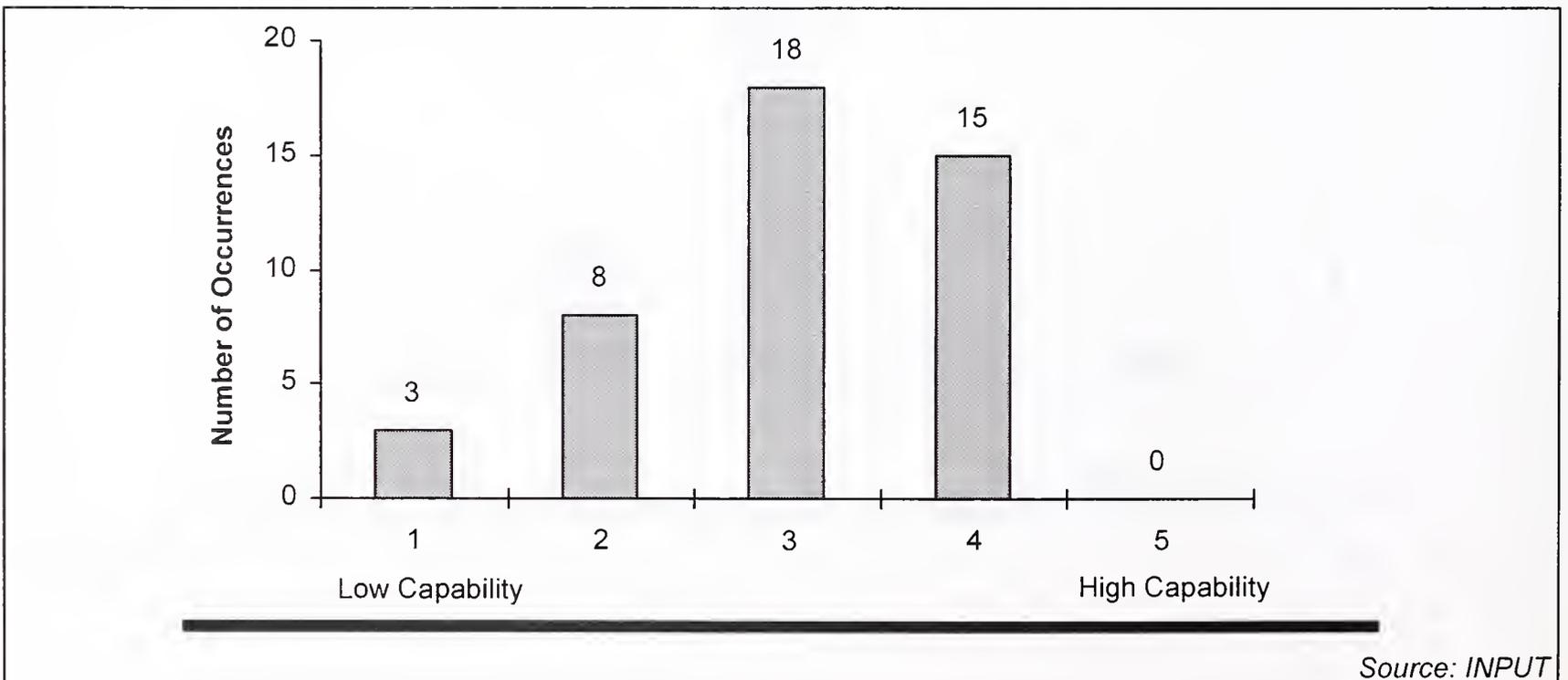


C

Data General

44 interviewees are aware of the BCS activities of Data General.

Exhibit A-3

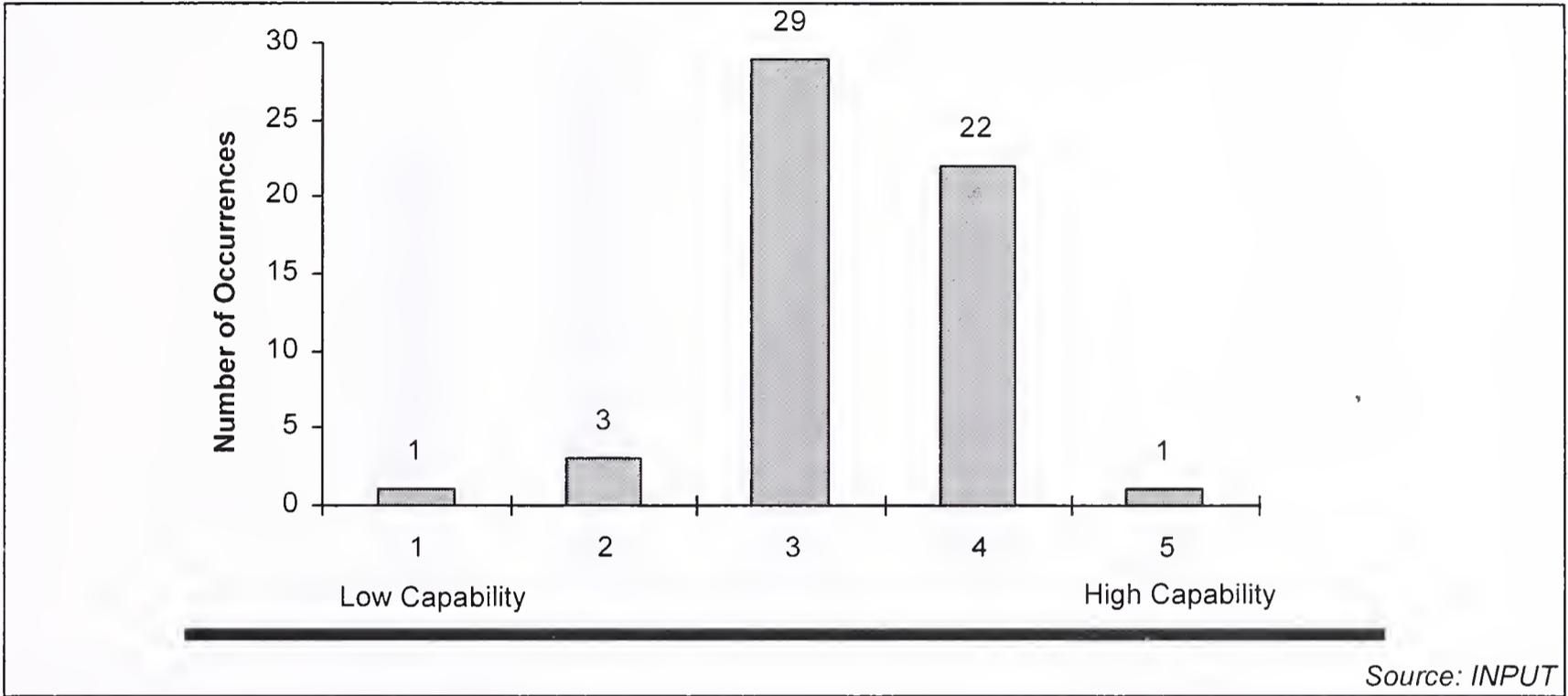


D

Digital

56 interviewees are aware of the BCS activities of Digital

Exhibit A-4

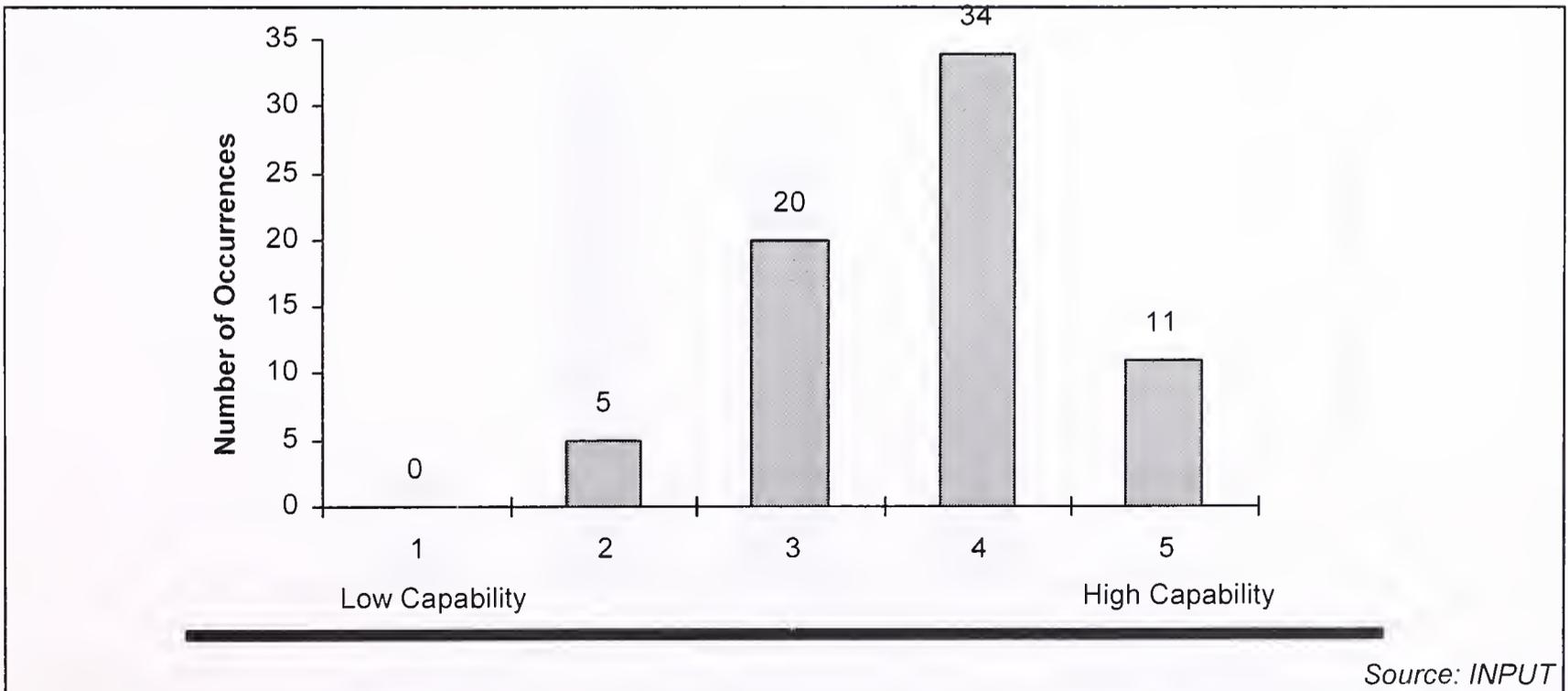


E

H-P

70 interviewees are aware of the BCS activities of H-P.

Exhibit A-5

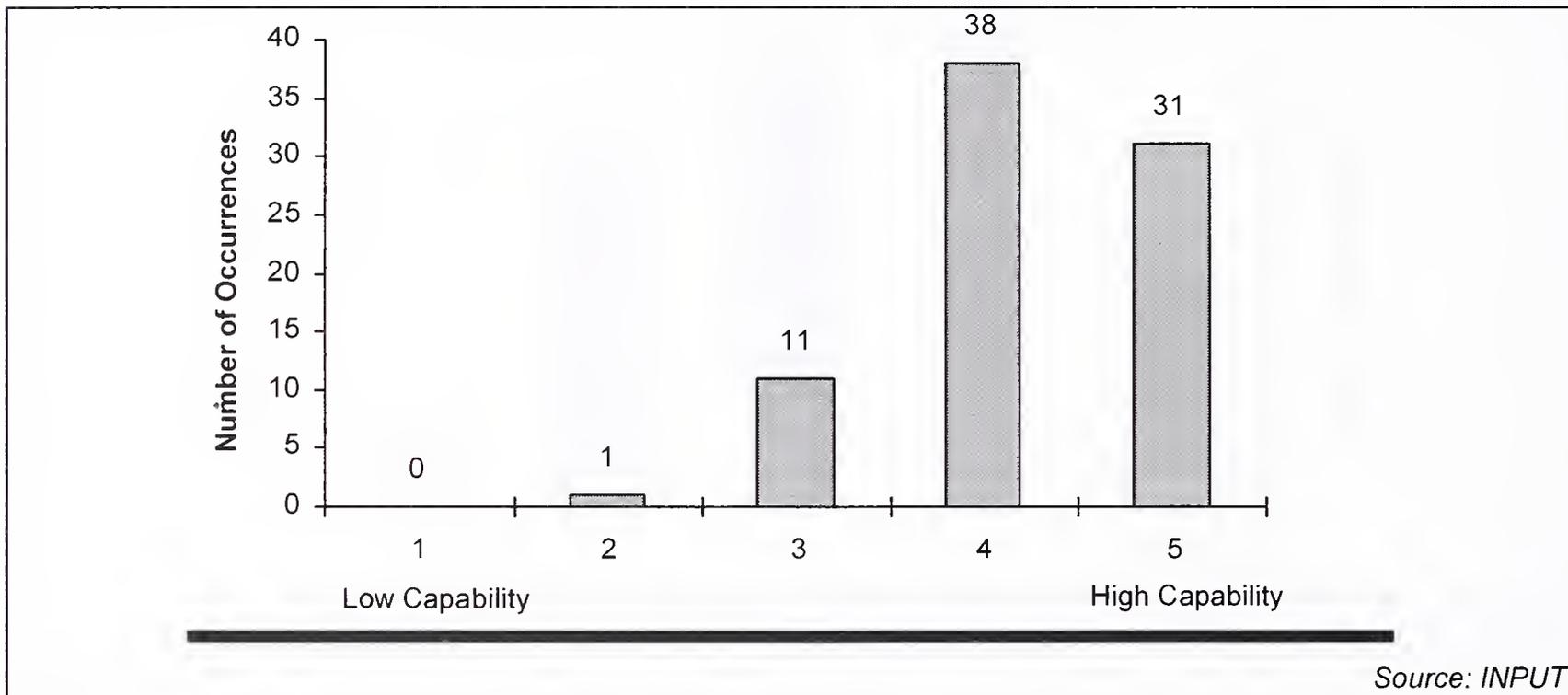


F

IBM

73 interviewees are aware of the BCS activities of IBM.

Exhibit A-6

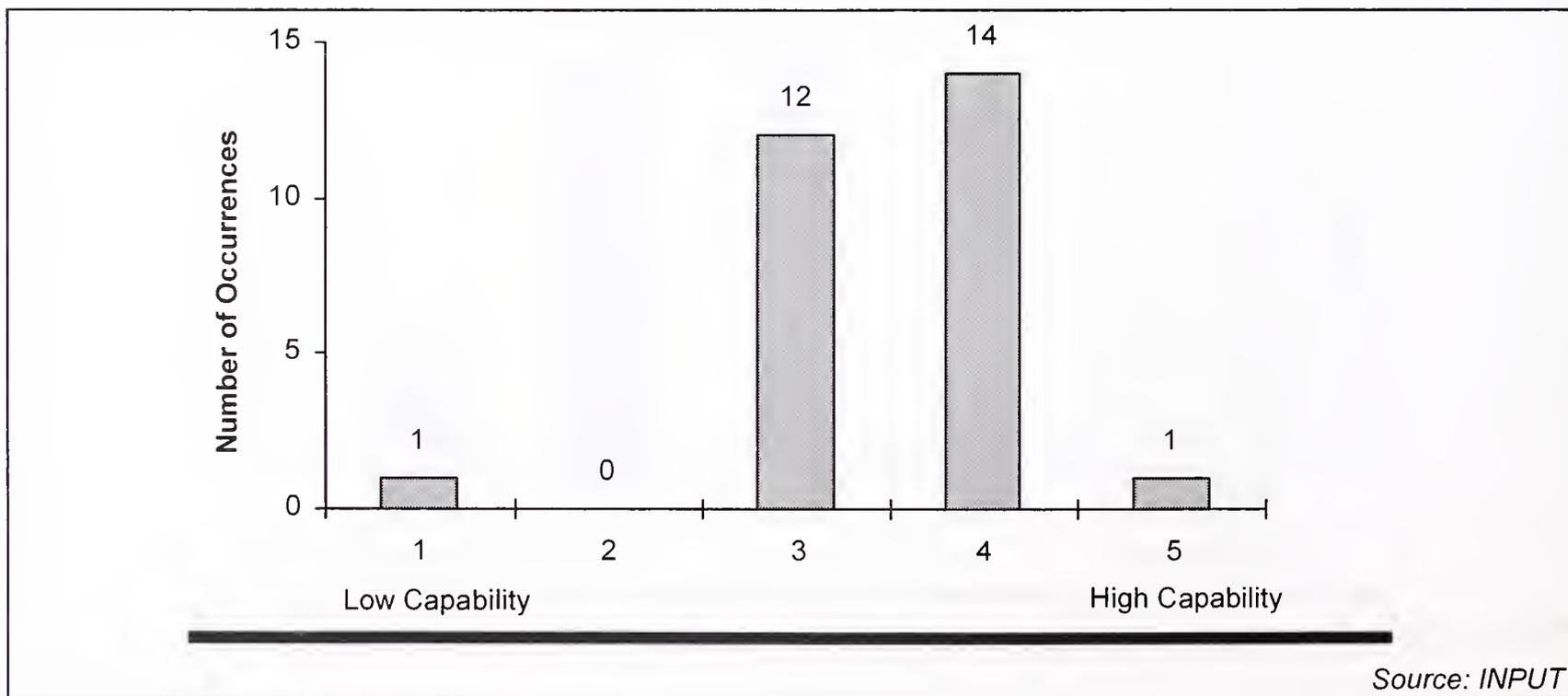


G

NCR

28 interviewees are aware of the BCS activities of NCR.

Exhibit A-7

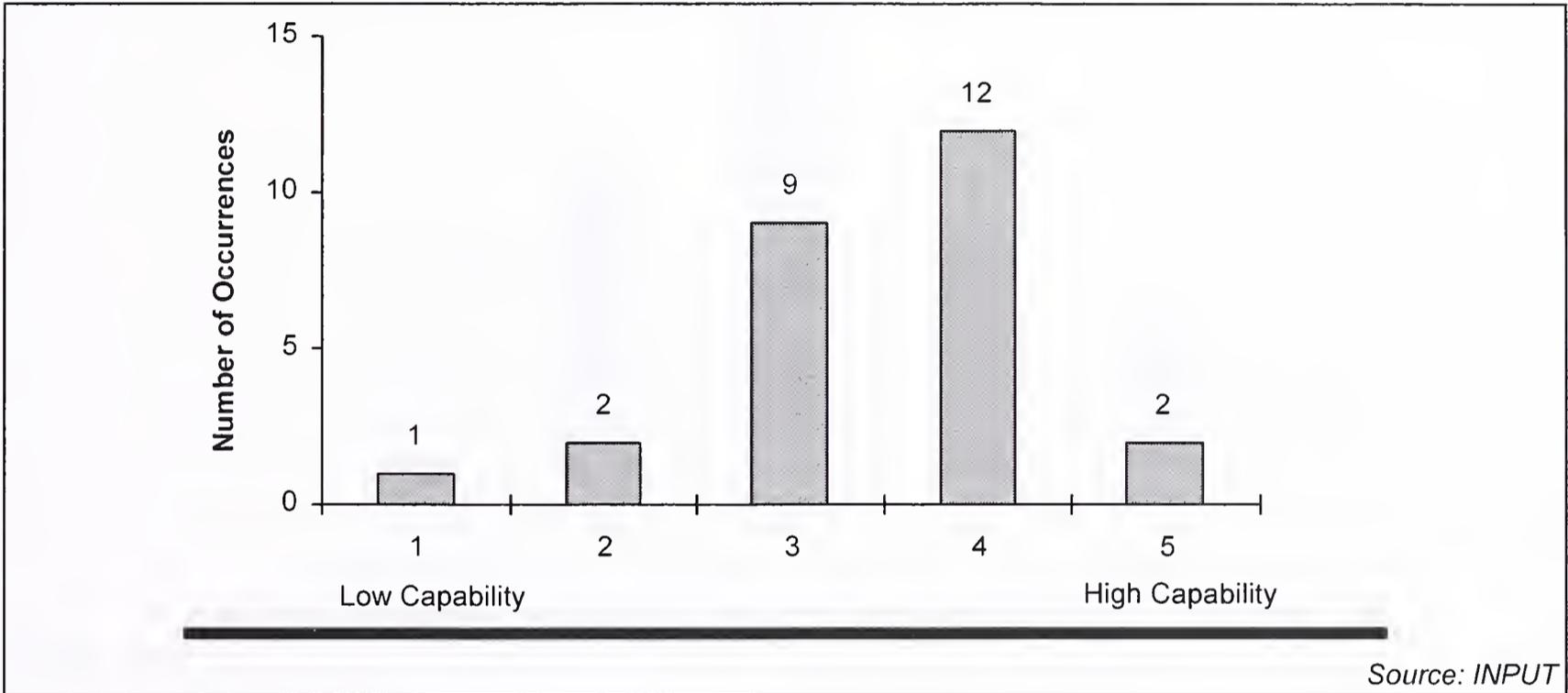


H

Safetynet

26 interviewees are aware of the BCS activities of Safetynet.

Exhibit A-8

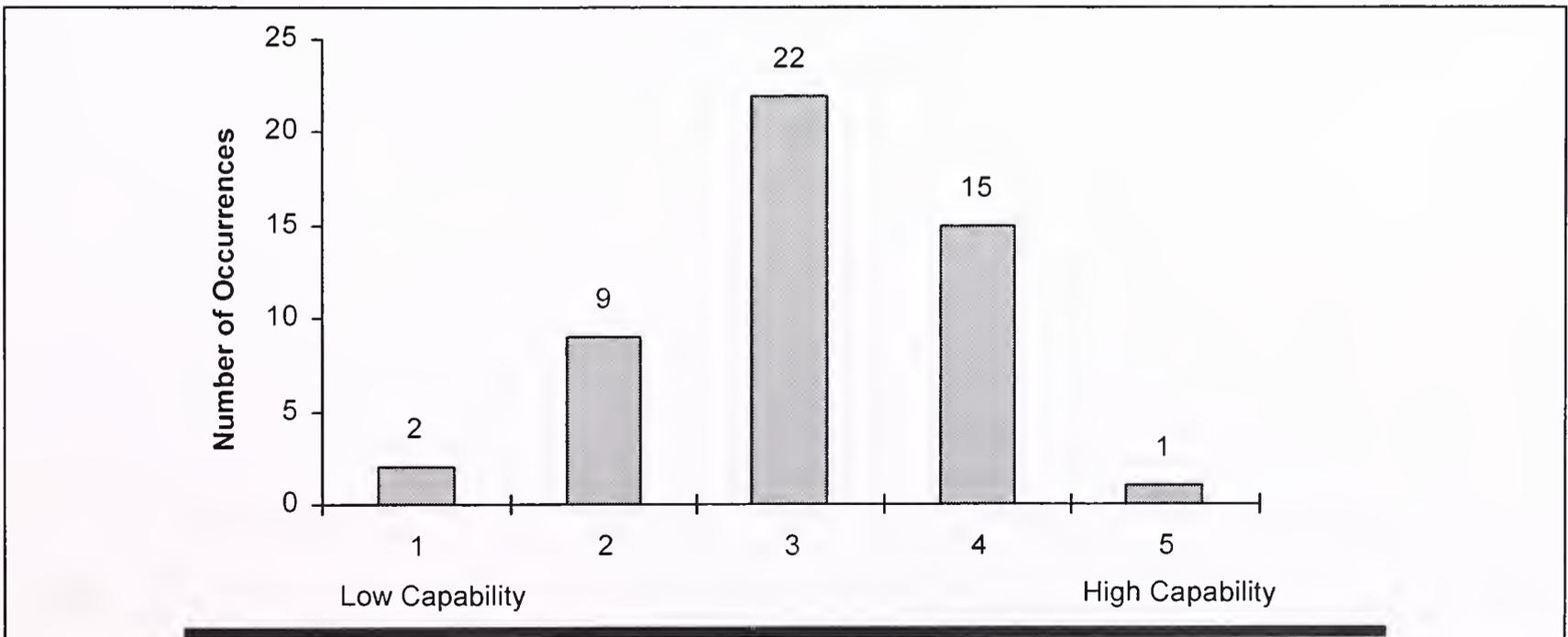


I

Unisys

49 interviewees are aware of the BCS activities of Unisys.

Exhibit A-9

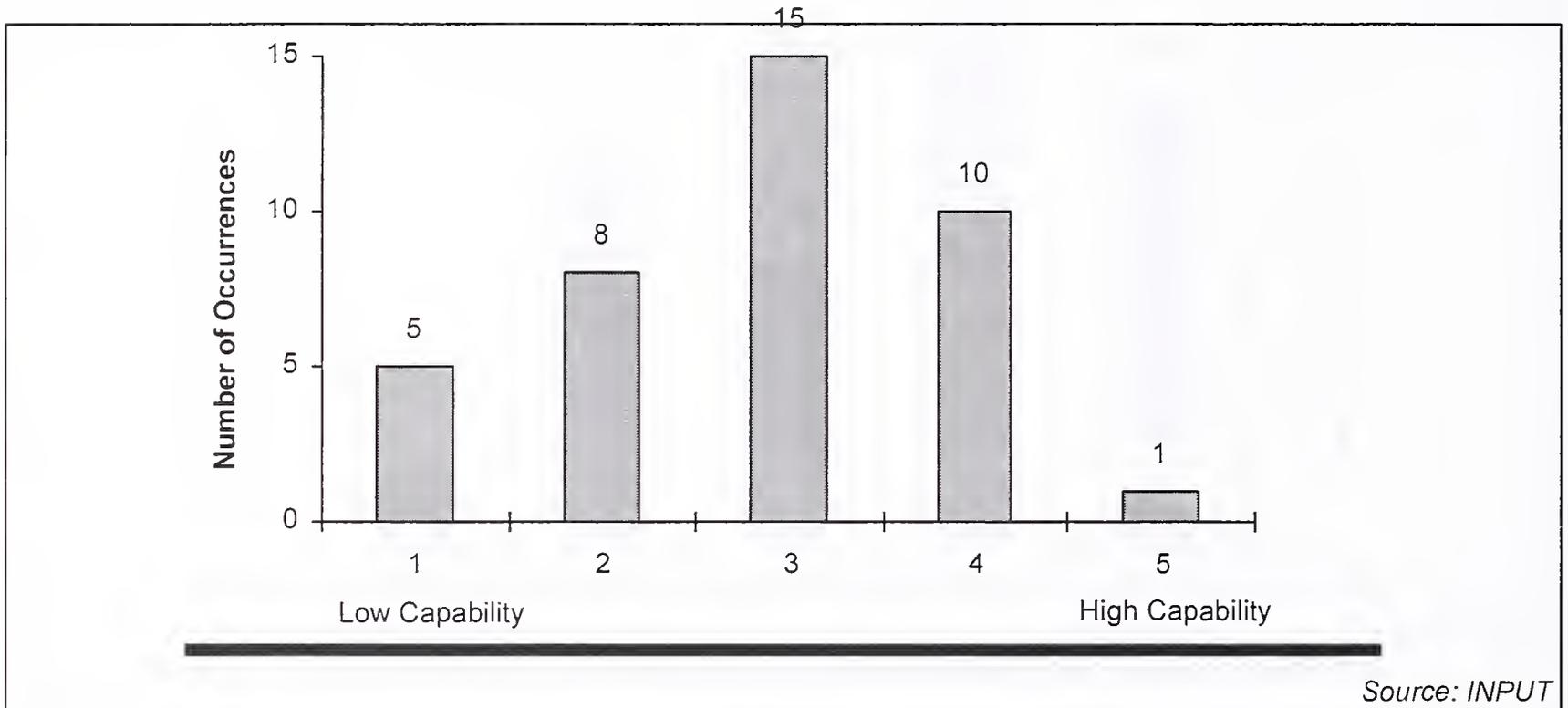


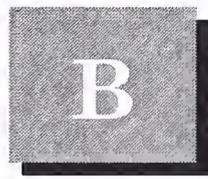
Source: INPUT

J
Wang

39 interviewees are aware of the BCS activities of Wang.

Exhibit A-10





Business Continuity Services Non User Questionnaire, U.S.

Definitions

Business continuity services (BCS) can be described as services that are designed to protect business critical activities underpinned by IT from disaster either by providing the necessary facilities to continue those activities in the event of a disaster or by preventing disasters from disrupting business critical activities in the first place. BCS can be split into two types: disaster recovery (DR) services and proactive business continuity services.

DR services include a number of services elements that keep a business running in the event of a major incident which temporarily puts its operations completely out of action. Service types include backup services, restart services and the provision of standby sites.

Proactive business continuity services are those which seek to prevent disasters from taking place or enable users to deal with the consequences more effectively. Typical service types include remote management services and contingency planning.

Respondent Details

Company Name	
Respondent Name	
Job Title	
Total Annual Turnover	
Total Number of Staff	
Total IT Budget	
Total Number of IT Staff	

Industry

Banking and Finance	
Insurance	
Government	
Distribution	
Utilities	
Manufacturing	
Other (please specify)	

Screening Questions

1. Please indicate if you have purchased any of the following business continuity provisions in the last five years:

Disaster Recovery Services	
Proactive Business Continuity Services (e.g. remote management services)	

2. Are any of your business activities that are strongly underpinned by IT mission critical?

Yes	
No	

3. If yes, which of these processes/applications are mission critical?
-

If yes to either option in Q1 and no to Q2, please terminate the interview or switch to user questionnaire.

4. Please indicate the extent to which you think the following factors pose a threat to the continuity of your mission critical IT activities (1=very low, 5=very high) now. Additionally, please indicate how big a threat you believe these factors will pose in 2 years' time (1=very low, 5=very high). *Please rotate.*

	Now (1-5)	In 2 Years
Insurance requirement/Insurance Cost Saving		
Credibility with shareholders/customers		
Fire/Flood Risk		
Threat of Terrorism		
Year 2000 Issues		
Risk of Power Cuts/Surges		
Failure of internal backups		
Risk of Theft		
Risk of software or hardware failure		
Internet security		
Virus attack		
Data security		
Increased use of networks		
Other(s) (please specify)		

5. Please indicate why you have chosen not to purchase business continuity services from an external vendor
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6. What provisions has your organisation taken to protect its mission critical IT activities from the effect of a disaster?

7. How will your IT infrastructure change in the next 2 years?

8. How will this affect your need for business continuity services?

9. Under what circumstances would you purchase business continuity services from an external vendor?

10. What benefits would you seek from use of external business continuity services?

11. What is the maximum downtime that you can accept?

0-6 hours	
7-12 hours	
13-24 hours	
25-48 hours	
49-72 hours	
More than 72 hours	

12. In the next two years, do you believe that this will:

Increase	
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Decrease	
Stay the same	

13. Please indicate whether or not you are aware of the following vendors as business continuity vendors. If you are aware of their business continuity activities, please indicate your impression of their business continuity capabilities (1=low capability, 5=high capability). *Please rotate*

	Aware (Y/N)	Capability (1-5)
Amdahl		
Cap Gemini		
Cap-RS (now SG-RS)		
Comdisco		
Data General		
Digital		
H-P		
IBM		
NCR		
Safetynet		
SG-RS		
Wang		
Unisys		

14. Please indicate the criticality of each IT product category to your business. Additionally, please indicate what you believe will be the criticality of each category in 2 years (1=very low, 5=very high). *Please rotate.*

	Criticality (1-5)	Criticality in 2 years (1-5)
Mainframes/datacentres		
Unix Servers		
NT Servers		
Proprietary midrange (e.g.AS/400s)		

PC/LANs		
WANs		
Telephony Equipment		
Printers		
Other, please specify		

Disaster Recovery Services

15. What do you see as the 3 major advantages of external disaster recovery services?
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16. What do you see as the 3 major disadvantages of external disaster recovery services?
-
17. How will your need for such services change over the next two years?
-
18. Why will this need occur?
-
19. What is the likelihood that you will purchase a disaster recovery contract within the next two years (1=very low, 5 very high)?
-
20. Please indicate the types of disaster recovery service of which you are aware and the likelihood that you would purchase it within the next two years (1=very low, 5=very high).

Disaster Recovery Service Types	Aware (Y/N)	Likelihood of purchasing (1-5)
Hot Standby/High Availability		
Warm Standby		
Cold Standby		
On-Site Backup Service/Mobile Units		

Proactive Business Continuity Services

Proactive business continuity services are those which seek to prevent disasters from taking place or enable users to deal with the consequences more effectively. Typical service types include remote management services and contingency planning.

21. What do you see as the 3 major advantages of external proactive services?

22. What do you see as the 3 major disadvantages of external proactive services?

23. How will your need for such services change over the next two years?

24. Why will this need occur?

25. What is the likelihood that you will purchase a proactive business continuity services contract within the next two years (1=very low, 5 very high)?
-

26. Please indicate the types of proactive business continuity services of which you are aware and the likelihood that you would purchase it within the next two years (1=very low, 5=very high).

Proactive Service Types	Aware	Likelihood of purchasing (1-5)
Remote Management		
Virus Protection/Data Security		
Contingency Planning & Risk Analysis		

27. Please indicate the influence that each of the following would have on your organisation's selection of business continuity vendor(s) (1=low, 5=high).

	Influence (1-5)
Managing Director	
Finance Director	
IT Director	
IT Manager	
Business Users	
Internal Auditors	
External Auditors	
Regulatory Body	
Other (please specify)	

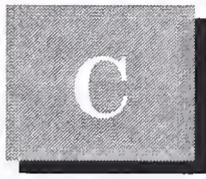
28. What are the key services that you would expect a supplier of business continuity services to provide?
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29. Please indicate the importance of the following selection criteria to you if you were to choose a supplier of business continuity services (1=very low, 5=very high).

Adherence to a published code of conduct	
Membership of BCI/ Survive/CSSA	
General support capability	
Multiplatform capability	
Network expertise	
Financial stability	
Customer references	
Being an independent business continuity services vendor (e.g. Comdisco, SGRS)	
Being a large systems vendor (e.g. Hewlett-Packard, IBM)	
Total business continuity services provision	
Platform specific provision	
Providing BCS as a part of a managed services or outsourcing contract	
Cost of service	
Ability to offer 'best of breed service'	
Ability to tailor offering to specific requirements	

Thank you for your assistance

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Business Continuity Services User Questionnaire, U.S.

Definitions

Business continuity services (BCS) can be described as services that are designed to protect business critical activities underpinned by IT from disaster either by providing the necessary facilities to continue those activities in the event of a disaster or by preventing disasters from disrupting business critical activities in the first place. BCS can be split into two types: disaster recovery (DR) services and proactive business continuity services.

DR services include a number of services elements that keep a business running in the event of a major incident which temporarily puts its operations completely out of action. Service types include backup services, restart services and the provision of standby sites.

Proactive business continuity services are those which seek to prevent disasters from taking place or enable users to deal with the consequences more effectively. Typical service types include remote management services and contingency planning.

A cold standby site is an alternative site, minus computer hardware or office facilities, available for long term use.

A warm standby site is an alternative recovery centre already equipped and ready to begin the process of resuming critical operations following a disaster.

A hot standby site cuts recovery time to an absolute minimum by already having current data available, instead of having to restore from backup media. The ultimate manifestation would be a complete dedicated standby system.

Respondent Details

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Respondent Name	
Job Title	
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Total Number of Staff	
Total IT Budget	
Total Number of IT Staff	

Industry

Banking and Finance	
Insurance	
Government	
Distribution	
Utilities	
Manufacturing	
Other (please specify)	

Screening Question

- Please indicate if you currently use any of the following business continuity provisions

Disaster Recovery Services	
Proactive Business Continuity Services (e.g. remote management services)	

If none of the above, please terminate the interview or switch to non user questionnaire.

2. When did your current business continuity contract begin	
3. Why did you purchase a business continuity contract?	
4. From which vendor(s) did you purchase your contract?	
5. Please estimate how much you have spent on Business Continuity contracts from external vendors over the past year.	
6. Please estimate the proportion of this sum that can be attributed to each equipment type platform where applicable.	

	% of Spend
Mainframes/datacentres	
Unix Servers	
NT Servers	
Proprietary midrange (e.g.AS/400s)	
PC/LANs	
WANs	
Telephony Equipment	
Printers	
Other, please specify	

7. Please indicate the importance of the following reasons for purchasing business continuity contracts now. Additionally, please indicate how important you believe these reasons will be in 2 years' time (1=very low importance, 5=very high importance).

	Now (1-5)	In 2 Years
Insurance requirement/Insurance Cost Saving		
Credibility with shareholders/customers		
Fire/Flood Risk		
Threat of Terrorism		
Year 2000 Issues		
Risk of Power Cuts/Surges		
Failure of internal backups		
Risk of Theft		
Risk of software or hardware failure		
Internet security		
Virus attack		
Data security		
Increased use of networks		
Other(s) (please specify)		

8. Within your organisation, which processes/applications are mission critical and need to be underpinned with external business continuity services?
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9. Please indicate the influence that each of the following had on your decision to purchase a business continuity contract(s) (1=low, 5=high).

	Influence (1-5)
Managing Director	
Finance Director	
IT Director	
IT Manager	
Business Users	
Internal Auditors	
External Auditors	
Regulatory Body	
Other (please specify)	

10. Please indicate whether or not you are aware of the following vendors as business continuity vendors. If you are aware of its business continuity activities, please indicate your impression of its business continuity capabilities (1=low capability, 5=high capability). *Please rotate.*

	Aware (Y/N)	Capability (1-5)
Amdahl		
Cap Gemini		
SG-RS		
Comdisco		
Data General		
Digital		
H-P		
IBM		
NCR		
Safetynet		
SG-RS		
Wang		
Unisys		

11. Please indicate the 3 most important attributes that you seek from a business continuity vendor?

12. Which of the following do you consider to be important selection criteria when choosing a potential Business Continuity Services Vendor? Please indicate level of importance (1=not at all important, 5=very important).

Adherence to a published code of conduct	
Membership of BCI/ Survive/CSSA	
General support capability	
Multiplatform capability	
Network expertise	
Financial stability	
Customer references	
Being an independent business continuity services vendor (e.g. Comdisco, SGRS)	
Being a large systems vendor (e.g. Hewlett-Packard, IBM)	
Total business continuity services provision	
Platform specific provision	
Providing BCS as a part of a managed services or outsourcing contract	
Cost of service	
Ability to offer 'best of breed service'	
Ability to tailor offering to specific requirements	

13. Please indicate your level of satisfaction with your business continuity services vendor(s) (1=very low 5=very high)

Name of Vendor	Satisfaction (1-5)

14. What do you believe are the 3 major benefits of business continuity services and to what extent have each of these been achieved (1=very low, 5=very high)?

Benefit	Achieved (1-5)

15. What is the maximum downtime that you can accept?

0-6 hours	
7-12 hours	
13-24 hours	
25-48 hours	
49-72 hours	
More than 72 hours	

16. In the next two years, do you believe that this will:

Increase	
Decrease	
Stay the same	

17. With which elements of your business continuity services are you particularly satisfied and why?
-

18. With which elements of your business continuity services are you dissatisfied and why?
-

19. How satisfied are you with each of the following business continuity service features (where 1=very low, 5=very high)?

Access to standby site(s)	
Response times	
Proactivity	
Ability of standby site(s) to enable business continuity	
Remote management	
Multiplatform capability	
Network expertise	
Cost of service	
Flexibility	
Support	

20. Are there any business continuity service activities that are unmet by the services organisation assisting you?

Yes	
No	

21. If yes, what are these?
-

22. In what way(s) do you think that your business continuity services could be improved?
-

23. How do you expect your business continuity requirements to change over the next two years?
-

Disaster Recovery Services

24. Does your organisation currently have disaster recovery provisions?

Yes	
No	

25. How satisfied are you with the DR service for each type of equipment that is covered (1=very low, 5=very high)? Additionally, please indicate whether you think that the importance of DR contracts will increase, decrease or stay the same over the next two years for each equipment type?

	Satisfaction (1-5)	Future Importance
Mainframes/datacentres		
Unix Servers		
NT Servers		
Proprietary midrange (e.g.AS/400s)		
PC/LANs		
WANs		
Telephony Equipment		
Printers		
Other, please specify		

26. How satisfied are you with your alternative workspace (1=low, 5=high)
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27. Additionally, please indicate any way(s) in which this workspace could be improved

28. Please indicate the extent to which you use the following recovery methods now and your level of satisfaction with each method where applicable (1=very low, 5=very high)? Additionally, please indicate whether your usage of each method will increase, decrease or stay the same over the next 2 years.

	Now	Satisfaction	2 Years
Vaulting			
Mirroring			
Shadowing			
Standby Systems			

29. Please indicate the types of disaster recovery service you currently have, your satisfaction with them, and if you believe that usage of these services will increase, decrease or stay the same over the next two years. Additionally, please estimate the proportion of your DR spend that can be attributed to each DR service type.

Disaster Recovery Service Types	Have?	Satisfaction (1-5)	Increase, Decrease or the Same in 2 yrs	% of DR Spend
Hot Standby/high availability				
Warm Standby				
Cold Standby				
On-Site Backup Service/Mobile Units				

30. If applicable, please indicate your

Hot standby response times	
Warm standby response times	
Cold standby response times	

31. Please estimate the annual cost of your disaster recovery contract(s).
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Proactive Business Continuity Services

Proactive business continuity services are those which seek to prevent disasters from taking place or enable users to deal with the consequences more effectively. Typical service types include remote management services and contingency planning.

32. Does your organisation currently receive proactive business continuity services from an external vendor?

Yes	
No	

33. If no, why not?
-

If no, please terminate the interview and thank the respondent.

34. How satisfied are you with the proactive service for each platform that is covered (1=very low, 5=very high)? Additionally, please indicate whether you think that the importance of proactive services will increase, decrease or stay the same over the next two years for each platform?

	Satisfaction (1-5)	Future Importance
Mainframes/datacentres		
Unix Servers		
NT Servers		
Proprietary midrange (e.g.AS/400s)		
PC/LANs		
WANs		
Telephony Equipment		
Printers		
Other, please specify		

35. Please indicate the types of proactive services you currently have, your satisfaction with them, and if you believe that usage of these services will increase, decrease or stay the same over the next two years. Additionally, please estimate the proportion of your spend on proactive business continuity services that can be attributed to each proactive service type.

Proactive Service Types	Have?	Satisfaction (1-5)	Increase, Decrease or the Same in 2 yrs	% of Proactive Services Spend
Remote Management				
Virus Protection/Data Security				
Contingency Planning & Risk Analysis				
Other (specify)				

36. Please estimate the annual cost of your proactive business continuity services contract.

Thank you very much for your assistance

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