**Gartner.**

# Magic Quadrant for Enterprise Information Archiving

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**Analyst(s):** Alan Dayley, Garth Landers

▼ VIEW SUMMARY

Enterprise information archiving offers organizations solutions for compliance and e-discovery while reducing primary storage costs. Gartner evaluates vendors offering products and services that provide archiving for email, social media, files and other content types.

## Market Definition/Description

This document was revised on 11 November 2013. The document you are viewing is the corrected version. For more information, see the Corrections page on gartner.com.

The term "enterprise information archiving" (EIA) incorporates products and solutions for archiving user content (for example, email, files, IM, text messages and Microsoft SharePoint documents) and other data types (such as structured data, social media and Web page content). These products provide features such as data deduplication across content types, retention management, content indexing and at least basic tools for e-discovery (which, in this case, includes functionality for legal hold, advanced search, export and other features specific to managing data for e-discovery within the archive). Due to the complexity associated with managing multiple data types within the archive, EIA also more broadly encompasses capabilities such as federated archive repository management and common policy management for migration, retention and discovery across multiple repositories.

Evolving use cases, new cloud solutions and the closely related e-discovery software market, along with new partnerships and acquisitions, have made EIA a fast-changing market, and there are a significant number of vendors that have been added to the Magic Quadrant this year (see the Vendors Added and Dropped section).

Placement on the Magic Quadrant is based on Gartner's view of a vendor's performance against the criteria noted in this research. Gartner's view regarding vendor placement on the Magic Quadrant is heavily influenced by surveys completed by the vendors and more than 1,000 inquiries and one-on-one conversations at Gartner conferences conducted during the past 12 months with our clients on the topic of EIA. In addition, the Magic Quadrant methodology includes the solicitation of references from each vendor; for this Magic Quadrant, Gartner conducted over 110 reference checks from a set of customers provided by each vendor.

It is important to remember that the Magic Quadrant does not just rate a product's quality, capabilities and features. Product is an important part of the rating, but the vendor's ability to acquire and support customers is equally important, as is its ability to grow product and service revenue. A vendor that offers a strong, technically elegant product, but is unable or unwilling to invest in marketing and sales to generate revenue and growth, will find itself unable to invest sufficiently in future development. In addition, a vendor's ability to understand market dynamics and adjust product road maps accordingly (such as offering support for cloud archiving) is important in a market like EIA, where change is constant and establishing leadership, vision and credibility will propel some vendors to the front of the pack.

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## Magic Quadrant

**Figure 1.** Magic Quadrant for Enterprise Information Archiving

### STRATEGIC PLANNING ASSUMPTION

By 2018, data archiving implementations for three or more content types will triple in organizations of 500 or more employees.

### EVIDENCE

"Forecast: Enterprise Software Markets, Worldwide, 2010-2017, 3Q13 Update" and supporting Gartner research.

### NOTE 1
#### DEFINITION OF FINRA

The Financial Industry Regulatory Authority is the largest independent regulator of securities firms doing business with the public in the U.S. (Source: www.finra.org).

### NOTE 2
#### DEFINITION OF FISMA

The Federal Information Security Management Act of 2002 is a U.S. federal law that recognizes the importance of information security to the economic and national security interests of the U.S. (Source: Wikipedia).

### NOTE 3
#### THE ELECTRONIC DISCOVERY REFERENCE MODEL

The Electronic Discovery Reference Model is a group that develops resources and best practices for e-discovery consumers and providers.

### EVALUATION CRITERIA DEFINITIONS

**Ability to Execute**
**Product/Service:** Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

**Overall Viability:** Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

**Sales Execution/Pricing:** The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

**Market Responsiveness/Record:** Ability to respond, change direction, be flexible and achieve

CHALLENGERS — LEADERS

Symantec
Global Relay
Proofpoint
HP Autonomy
CommVault
Bloomberg
Mimecast
SilverSky — EMC — Smarsh
ZL Technologies

Metalogix — Sonian
IBM
Microsoft
Barracuda Networks
C2C
MessageSolution
ArcMail
OpenText
dataglobal

Google

NICHE PLAYERS — VISIONARIES

ABILITY TO EXECUTE
COMPLETENESS OF VISION
As of November 2013

Source: Gartner (November 2013)

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## Vendor Strengths and Cautions

### ArcMail

ArcMail's core offering, ArcMail Defender, is available as an appliance scalable to 32TB, as a virtual appliance and, in 2013, as a hosted cloud offering. In addition, a cloud gateway is available for hybrid/on-premises deployments. ArcMail has expanded content support in recent years to include Exchange, GroupWise, Gmail, IM, SharePoint and salesforce.com Chatter, and in April 2013, introduced ArcMail Social. ArcMail Defender is attractively priced, compared with other on-premises and cloud solutions, although customers tend to purchase too much capacity upfront. ArcMail offers an upgrade program to customers that have sustained uninterrupted product support maintenance contracts for three years and are willing to sign up for an additional three years. The vendor will provide such customers a new appliance free of charge. Expect ArcMail to continue to evolve its offering to support additional content types and improved e-discovery capabilities focused on small or midsize businesses (SMBs). ArcMail has good penetration in the government and educational markets. The majority of revenue is generated in North America and is primarily sold through reseller channels. The largest installation of ArcMail Defender supports 30,000 mailboxes.

#### Strengths

- ArcMail offers a simple, plug-and-play archiving appliance with support for many content types supported by code that has been organically developed.
- ArcMail provides excellent customer support with highly rated technical expertise.
- ArcMail Defender is available via flexible deployment options of an on-premises physical appliance, a virtual appliance, a hybrid cloud gateway appliance and a hosted solution.

#### Cautions

- As a small company, ArcMail is primarily focused on the SMB and small or midsize enterprise (SME) space and may not be appropriate for large enterprises.
- ArcMail's lack of granular access rights (users can see everything or nothing in the archive) is an administrative concern.
- ArcMail Defender has been primarily used for email archiving to this point, with minimal capture of other supported content.

competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

**Marketing Execution:** The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

**Customer Experience:** Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

**Operations:** The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

**Completeness of Vision**

**Market Understanding:** Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

**Marketing Strategy:** A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

**Sales Strategy:** The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

**Offering (Product) Strategy:** The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

**Business Model:** The soundness and logic of the vendor's underlying business proposition.

**Vertical/Industry Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

**Innovation:** Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

**Geographic Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

## Barracuda Networks

Barracuda Message Archiver is available as an on-premises appliance with up to 48TB of data storage and a maximum of 18,000 users per appliance. Exchange, Office 365, Domino, Gmail and GroupWise support is available. IM archiving is achieved in conjunction with the Barracuda IM Firewall. Social media can be archived by enabling the feature in the Barracuda Web Filter. Support for file shares is planned. Barracuda has focused on three categories of business: content security, application security and delivery, and storage (with the storage division encompassing backup, archiving and Copy). The Message Archiver product provides storage management, e-discovery and compliance, and end-user access to email. The Barracuda Instant Replacement program provides customers with next-day replacement of defective hardware and a free replacement appliance every four years, which includes migration to the new equipment. Data from Message Archiver can be exported to Barracuda's file sync and share (FSS) solution, known as Barracuda Copy, which enables rights-based file access, including external parties. Further integration with Copy and Barracuda's backup service is planned for 2014. Although priced competitively, customers often overbuy, negating potential cost savings. Barracuda Message Archiver is sold exclusively through the reseller channel and its largest customer has 14,000 mailboxes.

### Strengths

- Barracuda Message Archiver is easy to install and simple to manage.
- The product provides native search capabilities for Windows and Mac, mobile apps for iOS and Android, and offline cached access to archived email.
- Barracuda provides accurate and fast technical support and problem resolution, including a next-day Instant Replacement program.

### Cautions

- Barracuda Message Archiver supports limited content types — only email, some IM and some social media support.
- As an appliance, Barracuda Message Archiver is primarily used by small to midsize organizations, with larger implementations lagging behind.
- There is no current integration with Barracuda's cloud services, which are heavily used by its backup customers.

## Bloomberg

New York City-based Bloomberg, a privately held firm, has offered financial services software, real-time analytics and information services to the financial industry via SaaS for decades. Bloomberg Vault is a SaaS solution for archiving, compliance supervision and e-discovery for Exchange, Domino and social media environments, deployed by more than 650 companies. Bloomberg is heavily invested in financial services and has emphasized features for Dodd-Frank compliance, with support for voice communication compliance and an option for local archiving to support privacy requirements with Local Vault. In 2013, Personal Vault was added for end-user access to the archived data. Bloomberg has recently upgraded the interface for compliance supervision to provide an improved user experience. Adding to its capabilities, Bloomberg will continue to build out tightly coupled cross-content integrated archiving and file analytics/collection capabilities. Bloomberg Vault is an exclusively cloud-based offering and does not offer offline access to archived email. However, Bloomberg does enable end-user access through thin-client support via its Bloomberg Terminal software. Bloomberg's pricing model is per user per month, plus a per-GB per-month fee, and includes training, Securities and Exchange Commission (SEC)/Financial Industry Regulatory Authority (FINRA) attestation letters (as required) and historical archive data ingestion (see Note 1). Bloomberg's largest implementation of email archiving supports 11,000 mailboxes.

### Strengths

- The vendor has deep knowledge of the financial services industry. It provides unique native ingestion capabilities for Bloomberg messaging, and integration with Bloomberg's analytical services, legal research and trading systems.
- Bloomberg Local Vault allows organizations to store data locally and manage policies globally across multiple geographies worldwide.
- Bloomberg leverages its experience in building highly scalable and available environments to deliver Bloomberg Vault using its private data centers.

### Cautions

- Bloomberg Vault's e-discovery functionality is limited to advanced search, legal hold and export.
- Nonfinancial service organizations should evaluate required functionality cautiously when selecting Bloomberg for shortlists.
- Bloomberg does not offer extensive capabilities for file archiving.

## C2C

C2C offers ArchiveOne Enterprise as an on-premises product; private and hybrid cloud archiving solutions are supported by using Amazon Simple Storage Service (S3) on the back end. ArchiveOne Enterprise is targeted at midsize to large customers. The vendor also offers ArchiveOne Express, a solution for organizations with fewer than 200 mailboxes. Supported content for ArchiveOne includes Exchange, Office 365, Domino, Windows file shares, Lync and SharePoint. The vendor offers left-hand-side Electronic Discovery Reference Model (EDRM) e-discovery functionality, and is differentiated by the fact that its information management, collection, preservation and legal hold capabilities can be applied to archived data, production email, calendars and personal folder (PST) data (C2C calls this collection and preservation "in-place legal hold"). PST management includes the discovery of PSTs wherever they may reside, then holding in place or ingestion into the archive. In 2013, C2C has been increasing its focus on information management and "dark data" management (management of unknown unstructured data). The vendor will continue to build out its cloud capabilities, in addition to providing deeper information management features focused on managing data in place and e-discovery. ArchiveOne is offered both direct from C2C and through partners. C2C's revenue is split between Europe and North America. The largest customer has 70,000 mailboxes.

### Strengths

- C2C offers solid PST management, including ingestion into the archive.
- ArchiveOne Enterprise and Express are simple to install and simple to manage.
- ArchiveOne Enterprise and Express offer the ability to hold in place for email and files as part of their overall information governance portfolio.

### Cautions

- The vendor's product strengths are consistent, but the frequent changes in marketing messages confuse some customers.
- C2C does not provide a multitenant cloud solution and native social media support.
- C2C is a small player in the market, and most of its customers are small or midsize organizations; scaling the business has not yet been proven.

## CommVault

CommVault's latest archiving software release, Simpana 10, was released in early 2013 as part of the vendor's overall data and information management portfolio. The product provides support for Exchange, Office 365, Domino, heterogeneous file systems and SharePoint. Social content is supported via partners. CommVault is differentiated by its functionally rich technology, including integrated support for backup, archiving, reporting and e-discovery (facilitated by the Simpana OnePass feature), as well as ContentStore, a virtual repository that manages data across various locations and media types (including a distributed index), and the ability to assign metadata-based policies to one managed copy, which CommVault calls Reference Copy. While CommVault doesn't offer its own cloud solution, it counts over 200 managed service providers (MSPs) and cloud services providers as customers. Almost 85% of the vendor's sales are through partners, and 67% of its archiving revenue is generated in North America. In 2013, CommVault refocused its top-level messaging beyond backup to information management. It continues to build out its support for the healthcare vertical, while also increasing its focus on large-scale analytics and information management. CommVault's largest file archiving customer has 24PB of Simpana OnePass capacity, and the largest email archiving implementation is 30,000 mailboxes.

### Strengths

- CommVault's Simpana product has been organically developed, and provides a single platform for information management that can support a wide variety of content from multiple sources.
- Advanced functionality, such as OnePass, Reference Copy, ContentStore, and new indexing and search, differentiates Simpana from its competitors.
- Partners and customers claim the vendor is easy to do business with — the product is widely available through partners, including Fujitsu, Hitachi Data Systems and Microsoft Azure, as well as through numerous distributors and resellers.

### Cautions

- Customer experience with first-level support and follow-through on issues is mixed.
- CommVault is still establishing email deployments in organizations with larger user counts.
- Compliance supervision is not as strong as other offerings in the market.

## dataglobal

A privately held, venture-capital-backed company, dataglobal is headquartered in Heilbronn, Germany, with offices in Boston and Romania. The vendor's integrated solution set is composed of dg mail (Exchange, Lotus Notes), dg file, dg office (for SharePoint and Office documents) and dg erp. Additional products include dg connect (API for application data archiving), dg classification, dg search and dg hyparchive (EIA backbone with support for mobile access and simple e-discovery). The vendor places a strong focus on classification as a differentiator, with support for self-learning, metadata and content classification. All archival data is stored in a single common repository, with common services (such as retention management, single instancing, legal hold, search and analytics) applied across all content types. Support for archiving social media content is provided via partners. It recently added dg search, a product line focused on enterprise search. In 2013, dataglobal focused heavily on customer feedback processes, support and other customer-focused programs, such as an executive sponsor program. Today, 85% of the vendor's business is in EMEA, and it is looking to expand its presence in North America. It has signed a reseller agreement with Dell, which will bundle the complete set of dg products with its hardware solutions. In addition, the product is offered by T-Systems as its cloud archiving solution in EMEA, and Microsoft offers it as a classification service via the Azure cloud service. The largest email archiving customer has 9,000 mailboxes.

### Strengths

- The vendor has a highly rated support organization.
- The vendor provides support for a broad set of content types, both out of the box and via APIs. Its organically developed products support everything from scanned images to traditional EIA content (email, files, SharePoint) to ERP systems.
- The dg product suite is increasingly available through a wide variety of partners, including Dell, Microsoft and T-Systems.

### Cautions

- Pricing can be complex and confusing.
- E-discovery functionality is weaker than that offered by competitive products.
- The vendor's footprint in the U.S. is small, and it suffers from a lack of awareness. Non-European customers need to feel comfortable working with a small vendor in a remote geography.

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## EMC

The EMC SourceOne archiving portfolio supports Exchange, Domino and other messaging applications via SMTP; Windows, Unix, CIFS and NFS on network-attached storage (NAS) devices; SharePoint; and complementary products for e-discovery and compliance supervision. EMC also offers support for structured data archiving and application retirement with its EMC Enterprise Archiving Solution. Cloud Tiering Appliance and DiskXtender work in conjunction with SourceOne for File Systems for multitier migration. In 2013, EMC released EMC Data Protection Suite, a packaged offering combining backup technologies, including EMC NetWorker, EMC Avamar, EMC Data Protection Advisor and EMC SourceOne. EMC SourceOne is integrated with EMC storage offerings, including Data Domain for deduplication storage, Atmos cloud storage, Centera for compliance and Isilon for scale-out environments. With the release of SourceOne 7.0, EMC provides left-hand-side EDRM e-discovery capabilities, including search and legal hold across multiple object types, custom identity management, customized tagging with multitag capability, and multiple format export choices for email, file share and SharePoint content. SourceOne for File Systems offers in-place hold for file system data. The vendor offers EMC Kazeon eDiscovery for data classification and early case assessment. EMC's largest implementation supports 195,000 mailboxes.

### Strengths

- EMC SourceOne is developed, sold and supported within the vendor's Backup and Recovery Services division, enabling additional integration with other EMC products.
- The product has a full spectrum of email archiving capabilities, with support for user-directed archiving, journaling, mailbox management and supervision.
- EMC SourceOne is available worldwide via a broad set of partners. It is localized into multiple languages, and partners are provided with comprehensive training and accreditation, providing customers worldwide with local expertise.

### Cautions

- EMC SourceOne is not available from EMC as a SaaS solution, although it is available through partners as a hosted offering and also supports cloud storage as a target.
- The product's supervision deployment options and reporting capabilities are in need of improvement.
- EMC SourceOne has historically been late to market with functionality, including e-discovery for content types other than email.

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## Global Relay

Global Relay is a SaaS archiving provider headquartered in Vancouver, British Columbia (with offices in New York, Chicago, London and Singapore) that has historically focused on the financial services archiving market. The vendor recently made two major investments. The first was a $24 million state-of-the-art ecologically friendly data center located in Vancouver. The second was a $10 million investment to rewrite the flagship product, Global Relay Archive. Version 9 was released in June 2013, with improved e-discovery, compliance and supervision capabilities. Version 10 employs hyperscale IT architectures designed to support up to 400,000 users in one repository. Expect Global Relay to continue to work on scaling its architecture, improving mobile device management, and keeping its focus on the financial services market. Holistic corporate message management is a key strategic vision of Global Relay. In 2013, a mobile device manager was released for Android and BlackBerry devices that captures PIN data, SMS text messages, call logs and location information. Global Relay Archive supports Exchange (on-premises and online), Domino, Gmail, GroupWise, other messaging applications via SMTP, Bloomberg, Thomson Reuters, Chatter, Yammer, Lync, social media, and mobile content. Global Relay is listed as the named archiving vendor in FINRA's Compliance Resource Provider Program. Seventy percent of Global Relay's sales are direct, with 70% of revenue coming from North America, 20% from EMEA and 10% from the Asia/Pacific region. Globally, 85% of its revenue comes from financial services organizations. The largest customer is currently archiving 80,000 mailboxes.

### Strengths

- Global Relay provides market-leading compliance supervision.

- To support its strong knowledge of the financial services space, Global Relay has many employees with legal backgrounds.

- The vendor offers strong SLAs — zero messages lost, 99.999% uptime, and 24-hour response to e-discovery and audit requests (physical extraction of data), supported by in-house legal, audit and e-discovery teams. Global Relay contracts for annual third-party validation testing (with KPMG) on all its security, business and operational controls.

### Cautions

- Global Relay has been slow in releasing a file archiving offering, which has been in beta for some time.

- Nonfinancial services organizations should request a proof of concept for the solution to ensure it meets their needs.

- Out-of-the-box lexicon support and policy reporting capabilities are limited and works in progress, requiring additional effort to build out.

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## Google

In 2012, Google Apps Vault was introduced as the compliance and archiving strategy for Google content. Currently, Vault supports archiving and compliance for Gmail and Google Talk. Support for Google Drive content, including Google Docs, will be coming soon to allow Vault customers to search, identify and export data from Drive. At this time, functionality focuses on Google-only content, but support for hybrid customers that have a mixed environment (with both Gmail and non-Gmail users) will be available with Exchange journal ingestion in the near term. Archiving for email is done in place, alleviating a second repository and the need for a third-party management tool. Google's ability to leverage its powerful search engine for Gmail (which is, by default, already indexed) provides very fast and user-friendly search capabilities. Data can be previewed or exported by the administrator using the Vault interface. Vault administration is geared around legal and compliance users and supports role-based management. Vault supplies in-depth audit logs where all user actions are tracked, including granular actions, such as individual email and doc views. As part of a global technology giant, the Google Apps Vault team is aggressively pursuing international opportunities, such as support for the European Commission's Data Protection Directive. The Postini archiving solution, renamed Google Message Discovery, is in the process of being transitioned to Vault, with Gmail and non-Gmail customers being supported. Google Apps Vault is offered on a simple per-user per-year basis, and the largest Vault customer has more than 300,000 Gmail accounts.

### Strengths

- Native Google search and management tools provide a fast, easy-to-use solution for Gmail customers looking for archiving capabilities.

- As part of the Gmail platform, the Google Apps Vault interface is localized into 28 different languages. Vault supports content from many more languages.

- Commitment to Vault is strong because it is viewed internally as the eventual tool for compliance and archiving for all Google content.

### Cautions

- Aside from Postini customers, Google is no longer supporting Exchange-only customers on Vault, but will support Vault customers using both Gmail and Exchange in a mixed-use

environment.

- E-discovery features, such as workflows, advanced search and availability of multiple export types, are still immature and might not meet use-case requirements for highly litigious organizations.
- Technical support for Google Apps Vault needs to improve in the areas of response accuracy and support staff depth of knowledge.

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## HP Autonomy

HP Autonomy offers a broad set of information management technologies, including Autonomy Consolidated Archive, which is sold as ACA on-premises and as Digital Safe in the cloud. The products support Exchange, Domino, Gmail, heterogeneous file systems, SharePoint, IMs, voice, video and social media content. Structured data archiving is offered through Application Information Optimizer. The vendor has a large number of customers in financial services, and provides supervision and surveillance as add-ons to its archiving portfolio. Search and analysis functionality is provided by HP's embedded Intelligent Data Operating Layer, which supports over 400 content repositories and 1,000 file formats. HP has weathered many challenges associated with the Autonomy acquisition, and the past year has been a study in turnarounds, including a continued focus on the product around additional content types, automated policy management, and supervision and surveillance. The division has greatly simplified pricing by adopting HP's standard software pricing framework and HP best practices for product management, quality assurance (QA) and support, and has overhauled its management team. In 2013, Autonomy products have been featured prominently at HP conferences and are cited as an important component of the vendor's overall strategy; 20% of its archiving products are sold through that channel. The largest email archiving implementation is for 120,000 mailboxes.

### Strengths

- HP Autonomy has a strong, scalable cloud offering, with numerous large customers and over 50PB of data under management. Likewise, ACA is a scalable solution option appropriate for large customers.
- Autonomy's capabilities and vision for information governance encompass a broad set of functional components, including archiving across multiple content types.
- Gartner has seen increased evidence that HP Autonomy is highly focused on working with any dissatisfied customers to address historical and current issues, whatever they may be (sales, product and/or support).

### Cautions

- Because organizational structuring takes time, customers may continue to see intermittent issues with account management and customer support.
- Despite portfolio simplification, HP Autonomy's list of numerous acquired products and its current portfolio of information governance products and modules are still complex for customers to understand and implement.
- The user interface on some products and modules is outdated, creating mixed themes and color schemes and sacrificing some ease of use.

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## IBM

IBM Content Collector (ICC) is the vendor's EIA solution offered along with complementary products for e-discovery (for example, IBM Atlas Policy Suite, IBM eDiscovery Analyzer and IBM eDiscovery Manager). ICC is available as an on-premises solution or as part of the IBM SmartCloud Management managed service. ICC supports Exchange, Domino, Office 365, Gmail and other messaging applications via SMTP, as well as file systems, SharePoint and IBM Connections. Additional social media archiving is offered via partnerships with Actiance and others, and SAP-certified archiving is supported via ICC for SAP. IBM's solution stores archived content in IBM content management repositories, providing the potential to further leverage this content as part of enterprise content management (ECM) processes. IBM continues to add to its information life cycle governance (ILG) capabilities with new releases and the acquisition of StoredIQ, which extends IBM capabilities for content analysis, e-discovery and defensible disposal. Expect continued messaging and go-to-market focus on buyer-based solutions and continued integration with the IBM ILG strategy, namely around identifying and managing data according to value and defensible disposal. IBM InfoSphere Optim database archiving products are the market share leader for structured data archiving, and unified policy management for both Optim and ICC is supported via the IBM Atlas Policy Suite. Financial services and government are key verticals for ICC, and 80% of customers buy directly from IBM. The largest production customer has 50,000 mailboxes managed by ICC.

### Strengths

- IBM has broad vision for ILG and defensible deletion. The breadth and depth of the products resonate with many large organizations.
- The StoredIQ acquisition, with file analysis and discovery capabilities, enables customers to

manage data starting early on in its life cycle.

- IBM offers a comprehensive solution across both unstructured and structured data, and a variety of ways to manage it all holistically.

### Cautions

- Organizations that are not looking for a broad, sweeping ILG-type infrastructure find many options and integration points to be overkill for their particular environments.
- IBM's pricing for ICC and other ILG products can be complicated, resulting in high total cost of ownership. Simplified pricing will be available in November 2013.
- ICC is difficult to implement and the administration console is not intuitive.

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## MessageSolution

MessageSolution provides broad support for Exchange, GroupWise and Domino archiving. Along with email support, MessageSolution's enterprise product family for archiving and e-discovery supports file shares (Windows, Unix and Linux), SharePoint, most public IM applications (MSN, Google, Yahoo, Jabber), Lync, Sametime, SMS and texts. Measurably more customers use archiving more than they use the product for e-discovery. MessageSolution manages its own cross-platform email migration, in addition to file shares and public folder migration into SharePoint. Future enhancements include integration with backup systems, predictive analytics, structured data archiving and medical image archiving for healthcare. The MessageSolution offering is available on-premises, hosted or via MSPs. The MSP offering is multitenant, allowing the MSPs to offer the service at a more favorable rate. MessageSolution offers Microsoft Azure integration and is an IBM Advanced Business Partner for Domino. The solution is straightforward, and many implementations are done via the Web, without the need for on-site assistance. MessageSolution is a global company with a strong presence in Asia (namely China). The largest product customer is currently archiving 60,000 mailboxes.

### Strengths

- MessageSolution archiving is flexible, and is offered on-premises, hosted in the cloud and as a multitenant MSP offering.
- Customers cite the solution as easy to implement, intuitive to use and easy to manage.
- MessageSolution's global presence, including a large installed base in China, makes it an appropriate choice for Asian and multinational customers.

### Cautions

- Most MessageSolution cloud deployments are for small to midsize customers, so larger organizations seeking a cloud solution need to ensure that the solution can scale to meet their needs.
- Reporting around the logging of and alerting for archive data, such as when searches have been run, needs improvement.
- Customers requiring e-discovery capabilities should be aware that these features in MessageSolution's product are largely unused.

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## Metalogix

Metalogix Archive Manager is Microsoft-centric, and supports Exchange, Office 365, heterogeneous file shares, IMs and SharePoint. SharePoint support is a particular strength, as the vendor has built up its portfolio of SharePoint management solutions via organic development and acquisitions. In June, Metalogix announced the availability of Metalogix Email Migrator to migrate live and archived email from other archiving systems into its own solution. The archiving products provide comprehensive storage management functionality, particularly for SharePoint and Exchange (including a focus on hierarchical storage management [HSM], which Metalogix refers to as "light" and "deep" archiving), and support a broad array of on-premises and cloud storage targets. Metalogix doesn't offer a cloud strategy of its own; it sells through cloud partners and to MSPs, and, in November 2013, it will launch a packaged email management solution utilizing Amazon cloud services. Expect Metalogix to deliver offerings that improve the use of metadata to assist in e-discovery and information management, deliver mobile access, and provide data protection to complement archiving retention capabilities. The vendor generates 50% of its archiving revenue outside of North America (40% in EMEA), and 54% is sold through partners. Metalogix has become increasingly focused on customer satisfaction, and has increased its sales and support head count by 15% over the past 12 months. The largest production customer is 55,000 mailboxes.

### Strengths

- The Metalogix solution provides strong file archiving capabilities with a focus on HSM, rather than compliance. Metalogix's largest file archiving customers are archiving hundreds of TBs.
- Metalogix has good knowledge of storage management; it understands how storage, archiving and content management (specifically SharePoint) are interwoven.

- Metalogix's price and excellent support are compelling consideration criteria.

## Cautions

- There is no support (even via partners) for archiving social media content.
- Archive Manager is Microsoft-centric, providing no support for other mail applications, except via SMTP.
- Some references report issues with indexing and e-discovery search performance.

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## Microsoft

Microsoft started offering archiving functionality with Exchange Server 2010. Subsequent releases of Exchange Server 2013, SharePoint Server 2013, and Exchange and SharePoint Online have seen major improvements. Microsoft's twofold archiving and data retention strategy revolves around: (1) managing data where it resides with in-place hold and (2) SharePoint as an overarching management tool and central repository for some retained data. In Exchange, a second archive mailbox called the Personal Archive Mailbox is created with the same environment, predominantly focused on reducing storage burdens. To support compliance, objects retained in Exchange (either the product mailbox or the archive mailbox) can be tagged with retention periods and stored where they are. Administrators can define policy that users can apply to folders. Mailboxes and folders can be managed by administrator-defined policies or personal tags set by users. New to SharePoint, the eDiscovery Center allows permissioned users to search across Exchange, SharePoint, Lync, SkyDrive Pro and Microsoft file shares. Files can be imported and marked for retention in SharePoint. However, SharePoint content cannot be archived using the native features built into the product. Archiving features are included with Exchange enterprise Client Access Licenses (eCALs).

### Strengths

- The ability to manage archive data within the native repositories, utilizing in-place hold, with familiar Microsoft management tools is attractive to some customers.
- Microsoft has asserted a strong commitment to create native archiving tools to meet its customers' needs, as attested by the continued improvements from Exchange 2010 to Exchange 2013.
- Storing archive data within the Exchange database negates the need for backup, disaster recovery and high availability associated with on-premises third-party archives.

### Cautions

- Exchange offers no native surveillance features. Federated and complex searches are limited, as are file archiving features such as placing files on hold and/or migrating into SharePoint.
- Microsoft does no archiving for Gmail, Notes, social media or other non-Microsoft content.
- Organizations that use high-cost storage for Exchange may find that the archiving and in-place hold approach does not offer cost advantages, compared with third-party products that offer single-instance storage and deduplication technologies.

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## Mimecast

Mimecast is headquartered in the U.K., and has primarily been focused on the EMEA markets, but has recently aggressively expanded into the U.S. market using the round of funding from 2012. Unified Email Management (UEM), offered as a service, includes email archiving, continuity, security and large file send. File archiving is supported for Windows file shares Box.net and Dropbox. SharePoint document archiving is supported through the file archiving feature. Lync IM is also supported. UEM security capabilities include protection against malware, spam, data leaks, etc., and UEM's email continuity allows users to work from the UEM source if their primary email system is down. Mimecast currently has approximately 5PB under management. The vendor has a major focus on the end-user experience and capabilities such as the recently released large file send. Expect more features around usability, and enhanced content management and analytics. Pricing is straightforward and on a per-user basis for either stand-alone email archiving or UEM. SharePoint and file archiving are additional per-user charges. The largest production customer is archiving 24,000 mailboxes.

### Strengths

- Mimecast focuses on the end-user experience, such as large file send and ease of use and access.
- UEM provides a well-integrated email archiving, continuity and security offering.
- Mimecast has demonstrated the ability to roll out new features requested by customers in a timely manner.

### Cautions

- The bulk of customer usage has been for Mimecast UEM, whereas Mimecast File Archive and

Mimecast Services for SharePoint have seen slow adoption since being introduced.

- Usability of the administration console, including the inability to use the browser's back button, needs improvement.
- Customers should be aware that UEM is still primarily focused on Microsoft Exchange, with other types of email support being relatively new.

## OpenText

OpenText email archiving products include OpenText Email Archiving, OpenText Email Management and OpenText Email Monitoring. The vendor offers additional products for the archiving of Windows-based files and SharePoint content. OpenText also provides SAP archiving through OpenText Archiving for SAP Solutions. OpenText recently released Application Governance & Archiving for SharePoint, with the intention of helping organizations to deploy SharePoint sites with OpenText functionality more quickly. The vendor provides support for legacy tape ingestion and restores through its InfoFusion Integration Center. OpenText partners with Actiance to support archiving for IM, SMS and social media content, and partners with Recommind for e-discovery. OpenText has automated classification for content managed in its repository with plans to release file visibility capabilities in 2014. OpenText's archiving solutions are offered predominantly on-premises; however, the vendor offers support for private and hybrid clouds, with a number of partners that offer it as a cloud service. Look for additional cloud offerings in the near future, including ease-of-use enhancements associated with a cloud application. Pricing for OpenText archiving products are on a per-seat basis, and there are volume discounts or enterprise license agreements. OpenText has a strong presence in public-sector/government organizations. Its largest customer is archiving 220,000 mailboxes.

### Strengths

- OpenText offers broad support for a wide array of unstructured and structured content types, and enterprise archiving is an integrated component of the ECM platform.
- Records management is integrated into the archiving products as part of an ECM platform.
- Content-based autoclassification, integrated with records management and archiving, is well-suited for organizations with strong information governance requirements.

### Cautions

- Customers using OpenText are able to leverage the ECM platform, but those not using OpenText will find higher costs associated with archiving as a stand-alone product.
- Customers have indicated that the customer experience, including support, account management and training, is an area that needs improvement.
- Customer communication regarding OpenText's formal road map and vision for enterprise archiving is inconsistent.

## Proofpoint

Since entering the archiving market via acquisition, Proofpoint has seen consistent growth in the high double digits for its archiving and e-discovery services. The product supports Exchange, Office 365, Zimbra, Windows file shares, SharePoint, IMs and social media. Compliance supervision is available as an add-on service. The vendor's acquisition of NextPage gives it broader information governance capabilities for files and other content within a data center, and it has recently released an integrated solution that enables collection and preservation of information that resides outside of the archive. In support of a number of U.S. government customers, Proofpoint's data centers are certified as Federal Information Security Management Act (FISMA)-compliant (see Note 2). In addition to providing comprehensive e-discovery features for archived data, Proofpoint partners with Nuix, Zapproved and Catalyst for broad-spectrum e-discovery. The vendor leverages its success in the security market to offer integrated threat protection, compliance, archiving and governance solutions to prospects and customers. Proofpoint has traditionally targeted larger enterprises but, in 2012, it expanded its target buyers to small and midsize customers through the introduction of a service called Proofpoint Essentials. The archiving service is also resold by Microsoft. The largest customer is archiving 121,000 mailboxes.

### Strengths

- Customer satisfaction with both the product and support is high. Proofpoint is in close touch with its customers, and supplied references had no negative comments.
- The service includes Proofpoint's DoubleBlind Key Architecture, providing sophisticated encryption and key management (with keys held only by the customer) for enhanced data privacy and security in the cloud.
- The vendor offers a guaranteed search performance SLA, supported by a scalable cloud architecture that is especially attractive to larger customers with high data volumes.

### Cautions

- Compliance supervision functionality is not as strong as what is available from competitive vendors, and more advanced user functionality (for example, sophisticated search) could be improved.

- While support for other content types is available, the service and its customers tend to be very email-centric.

- Proofpoint's DoubleBlind Key Architecture requires an on-site appliance for archiving from on-premises messaging applications, which may not be attractive to organizations looking for a pure hosted archive solution with no on-premises components.

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## SilverSky

SilverSky, most notably known for hosted Exchange email solutions, offers email archiving as part of its overall Email Protection Suite, which also includes email security, advanced data loss prevention (DLP), email continuity and encryption. Mobile support through Archive Anywhere allows access from most user devices to the archive without the requirement for additional software or apps installed on the devices. SilverSky provides support for IM, such as Lync and Google Talk, stored in the email archive repository. Company review policies for compliance and supervision are set by scoring thresholds, reducing the review workload. SilverSky will continue to build out policy-based archiving for additional content types, including files, using metadata and based on conditions. In addition, SilverSky plans on delivering format-preserving encryption, which will provide the ability to search and view archived data, while leaving the data encrypted when not being accessed. Most of SilverSky's revenue is generated in North America (75% direct and 25% through the channel), including sizable business through IBM. SilverSky's pricing is straightforward and is offered at different tiers for three-, five- and seven-year retention. The vendor's largest production customer archives 50,000 mailboxes.

### Strengths

- SilverSky provides a 99.9% SLA for archiving customers and a 100% availability SLA for cloud email customers that use the Continuity Archiving service.

- The Email Protection Suite provides a well-integrated experience for security, DLP, email continuity and archiving.

- Mobile access through Archive Anywhere is easy to use and convenient for users.

### Cautions

- New corporate branding means that SilverSky continues to face awareness challenges as a mature archive vendor.

- SilverSky doesn't currently provide support for file or SharePoint archiving. Social media archiving is available through partners.

- The majority of SilverSky's archive service customers are in North America.

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## Smarsh

Smarsh archiving is offered as a hosted solution. The success of Virtual Compliance Officer (VCO), along with smarshEncrypt and smarshDLP, is key to the financial services focus. Smarsh acquired Perpetually in 2012 for Web page archiving, renaming the product Smarsh Web Archiving. In 2013, through private investors, Smarsh reacquired the 60% stake in the company that was owned by Dell. SSAE 16 (SOC 2/SOC 3) data centers are located on both the East and West Coasts of the U.S. Small and midsize organizations are the prime targets for Smarsh; 85% of its customers are from financial services, and 95% of its revenue is generated in the U.S. Smarsh supports a broad range of applications, including Exchange, Office 365, Domino, GroupWise, Bloomberg, Gmail, Chatter, Yammer, IM and Web data. Expect content support expansion to continue. Smarsh partners with Actiance to deliver capture support for SharePoint and other social media content. As a new partner for Smarsh as of May 2013, The Nasdaq OMX Group resells the Smarsh suite of products, and integration is planned into the Nasdaq OMX Smarts platform. Basic e-discovery functionality is supported, and partnerships with Catalyst and Recommind give customers more comprehensive EDRM functionality coverage. The Smarsh offering is available in English only, and the largest customer has 17,000 mailboxes.

### Strengths

- Smarsh has a strong understanding of and support for the financial services market around broad compliance needs and relevant multiple content types.

- The VCO offering for policy-driven supervision and automated classification helps to refine and manage relevant data for matter management.

- Smarsh offers robust enterprise social media capture for Yammer and Chatter, and has improved its Web archiving capabilities.

### Cautions

-

The bulk of the Smarsh customer base continues to be small or midsize organizations; larger enterprises should take appropriate steps to ensure that the Smarsh solution will meet their needs.

- Smarsh has grown quickly and has shown some growing pains within the organization, namely around the consistency of the quality of first-line support.

- Nonfinancial services organizations should request a proof of concept for the solution to ensure that it meets their needs.

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## Sonian

Sonian offers archiving as a hosted service, mostly white-labeled through partners. The vendor supports more than 11,000 customers, many of which are small or midsize companies. The service supports Exchange, Office 365, Lotus Domino, GroupWise and other mail apps through SMTP and IMAP, IBM SmartCloud for Social Business, and file shares. Social media and IM support is through partners. Sonian's archiving offering runs on Amazon Elastic Compute Cloud (EC2)/S3, Rackspace and IBM's SmartCloud, with IBM offering it under its own brand as IBM SmartCloud Archive Essentials. Feature improvements this year include improved granular legal hold, more granular retention policies and additional collection methods, including POP3 and support for larger objects. Future enhancements to the portfolio include DiscoverSTOR, an unstructured data analysis platform that gathers and enables decisions across multiple content types. Sonian is also rolling out easier and less expensive migration tools to ingest datasets from third-party archiving repositories. Sonian does have a global presence, but 85% of the revenue is generated in North America. Sonian includes simple per-user per-month pricing for mailboxes, which includes all functionality. File archiving pricing, which dropped significantly this year, is offered on a per-gigabyte per-month basis. Sonian is seen as a low-cost leader. Its largest email archiving implementation is 12,000 mailboxes.

### Strengths

- Sonian provides a solid solution for small or midsize customers; the overall archiving feature set and ease of use are well-received.

- Customer support, account management and market knowledge have been cited as very positive by customers.

- Search functionality is ranked highly by customers for ease of use, speed and accuracy.

### Cautions

- Sonian has had slow adoption of some features, including file archiving.

- The service lacks some functionality, such as mailbox management; support for calendar entries, tasks, and contacts; and friendly mobile access.

- Sonian's low-price model and reliance on external infrastructures (like Amazon EC2/S3) and MSPs may be susceptible to market turns.

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## Symantec

Symantec has more than 27,000 Enterprise Vault and Enterprise Vault.cloud customers and the largest number of customers doing SharePoint archiving among vendors in this research (over 2,000). Symantec offers Enterprise Vault for on-premises archiving, and Enterprise Vault.cloud as a hosted archiving service. The Enterprise Vault products support Exchange, Domino and other mail applications via SMTP, as well as file archiving (Windows and Unix) and IM. Social media content is supported via partners. There are some differences in file content support between Enterprise Vault and Enterprise Vault.cloud, as Enterprise Vault supports archiving files from various sources (including file shares), while Enterprise Vault.cloud only pulls files from SharePoint, salesforce.com Chatter and Box. Symantec's Data Insight leverages archive policies created in Enterprise Vault to classify content. Symantec DLP has been integrated with Enterprise Vault as the Data Classification Services module. The Clearwell eDiscovery Platform from Symantec provides end-to-end e-discovery across most content, while Discovery Accelerator is for left-hand-side EDRM (identification, collection, preservation) e-discovery in the Enterprise Vault archive only. Expect more integration with Clearwell, as well as an increased focus on information governance solutions. Symantec sells the products directly, as well as through numerous partners, and the customer base is fairly well-distributed across verticals. Symantec's largest email customer is archiving 350,000 mailboxes, and its largest journaling-only customer is capturing content from 850,000 mailboxes. Its largest cloud customer is archiving 130,000 mailboxes.

### Strengths

- As the market share leader, Symantec offers a broad range of archiving options with support for on-premises and cloud deployments.

- Enterprise Vault is scalable and appropriate for any size customer installation, including large environments.

- Symantec has invested in making information governance a focus area with integrations with Data Insight, Clearwell and DLP.

**Cautions**

- Users can be confused by Symantec's product direction and road map.
- End-user access and management can be improved.
- Gartner has spoken to customers who either are unsatisfied with account management or have indicated that product support issues have not been resolved satisfactorily.

## ZL Technologies

ZL Unified Archive is typically deployed by large enterprises, and supports integrated archiving, records management and e-discovery as part of the same platform. Archiving functionality is available for Exchange, Office 365, Domino, Gmail, heterogeneous file systems, SharePoint, IMs and other content types. The product is organically developed, and doesn't rely on third-party solutions or technical partnerships. It leverages a grid-based architecture to provide linear scalability, and files and other content can be indexed and managed in place, without requiring a copy to be sent to the archive. In the future, the vendor will continue to focus on its unified architecture managing numerous data types all at scale. Nearly 40% of ZL Technologies' customers are in financial services, and it provides compliance supervision to support this vertical's required workflows. ZL Unified Archive is available both direct from the company and through channel partners, and a number of large, specialty cloud providers (including RenewData, SunGard and Viewpointe) utilize ZL as the technology powering their cloud archiving services. Seventy percent of ZL Technologies' revenue is via North American channels, and 30% is generated from Asia, with a strong presence in Japan. The vendor's largest email archiving implementation supports over 200,000 mailboxes.

**Strengths**

- ZL Technologies offers advanced functionality, such as support for U.S. Department of Defense (DoD) 5015 compliance, native capture of cloud data sources (including social media and FSS services) and advanced search across very large volumes of data.
- The product does well in very large environments; the vendor's largest customers are managing over 200,000 mailboxes and processing millions of records per day. One environment is managing 11 billion documents, including support for rapid search.
- References are highly satisfied with the support provided by ZL Technologies. Many cite the involvement of its engineers and executives, including the CTO, and their willingness to go "above and beyond" to meet customer needs.

**Cautions**

- Unified Archive's user and administrative interfaces could be more intuitive.
- Deployment and management can be complex. Training and project management are two areas in need of improvement.
- Given the breadth of functionality and relative complexity of the solution, the product may not be appropriate for small organizations.

## Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor's appearance in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

### Added

ArcMail, Barracuda Networks, Google, Microsoft and SilverSky are new to the Magic Quadrant this year.

### Dropped

There were no vendors dropped from the Magic Quadrant this year.

## Inclusion and Exclusion Criteria

To be included in the 2013 EIA Magic Quadrant, a vendor must:

- Be the developer/originator of the product, and not just a reseller or value-added reseller (VAR).
- Support a growing base of customers including at least 10 enterprise customers (5,000 users or more) that are using the software in a production environment for email archiving, *and* at least three of those should also be using the product for file archiving or other content archiving.
- Have a presence in at least two geographies worldwide and be industry-independent.
- Provide the solution as an on-premises software product, a SaaS offering or some combination.
- Achieve greater than $5 million in new license and maintenance revenue annually.

Although it is not an inclusion criterion, vendors are strongly encouraged to brief Gartner on their products. We will also request five references to support the criteria; three of these references should be using the products for both email and other content archiving.

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# Evaluation Criteria

## Ability to Execute

**Product or Service:** This is an evaluation of the features and functions of the vendor's EIA solution. Products must support integrated email and file archiving. Integration must support the following:

- Data reduction across multiple content types (for example, deduplication and single-instance storage)
- Common management across content types for supported features (for example, policy management, user definition, retention management and basic e-discovery [legal hold, advanced search, tagging, export])
- Full-text indexing and search for all content types

Higher ratings are assessed for support of SharePoint, IM, text messages, video/audio, social media content and structured data (applications and databases) — that is, support for these content types is optional, but is considered favorably. Higher ratings are also assigned to solutions with strong archive architectures, policy-based archiving and mailbox management features (email), quality of user experience, and e-discovery and retention management capabilities.

**Overall Viability:** This includes an assessment of the vendor's overall financial health, the financial and practical success of the EIA business unit, and the likelihood of the individual business unit to continue to invest in an EIA solution.

**Sales Execution/Pricing:** This is an evaluation of the vendors' capabilities in all sales activities and the structure that supports them. This includes pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

**Market Responsiveness/Record:** This includes an assessment of the ability to respond, change direction and be flexible as market dynamics vary. This criterion also considers the vendor's history of responsiveness.

**Marketing Execution:** This criterion assesses the effectiveness of the vendor's marketing programs, and its ability to create awareness and mind share in the market. It assesses whether the messaging is clear, whether the vendor provided references that used the unique features of the product in its target environment and whether the promotion of the product on the company's website is effective.

**Customer Experience:** This is an assessment of the quality of the customer experience, based on reference calls and Gartner client teleconferences (inquiry).

**Operations:** This criterion assesses the ability of the organization to meet its goals and commitments in an efficient manner. Past performance is weighted heavily.

**Table 1.** Ability to Execute Evaluation Criteria

| Evaluation Criteria | Weighting |
|---|---|
| Product or Service | High |
| Overall Viability | High |
| Sales Execution/Pricing | High |
| Market Responsiveness/Record | Medium |
| Marketing Execution | Medium |
| Customer Experience | High |

| | |
|---|---|
| Operations | Low |

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## Completeness of Vision

**Market Understanding:** This is an assessment of the ability of the vendor to understand buyers' needs and to translate these needs into the appropriate features in its EIA product. Also assessed are the ability to anticipate market trends (for example, the requirement to archive other content and to provide strong e-discovery support), and to quickly adapt via new features or partnerships and/or acquisitions.

**Marketing Strategy:** This criterion assesses whether the vendor has a clear set of messages that positions the product and differentiates it from competitors, consistently communicated throughout the organization and externalized through the vendor's website, advertising, customer programs and positioning statements.

**Sales Strategy:** This is an assessment of the vendor's strategy for selling to its target audience, including an analysis of the appropriate mix of direct and indirect sales channels.

**Business Model:** This criterion assesses the soundness and logic of a vendor's underlying business proposition.

**Offering (Product) Strategy:** This is an evaluation of the vendor's strategic product direction, including an analysis of its road map.

**Vertical/Industry Strategy:** This criterion assesses the vendor's strategy for meeting the specific needs of individual vertical markets and market segments (for example, financial industry-regulated employee supervision, or state and local government information retention and disclosure requirements).

**Innovation:** This criterion includes an assessment of product leadership, and the ability to deliver archiving features and functions that distinguish the vendor from its competitors.

**Geographic Strategy:** This is an evaluation of the vendor's strategy for penetrating geographies outside its home or native market.

**Table 2.** Completeness of Vision Evaluation Criteria

| Evaluation Criteria | Weighting |
|---|---|
| Market Understanding | High |
| Marketing Strategy | Medium |
| Sales Strategy | Medium |
| Offering (Product) Strategy | High |
| Business Model | Low |
| Vertical/Industry Strategy | Medium |
| Innovation | Medium |
| Geographic Strategy | Medium |

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## Quadrant Descriptions

### Leaders

Leaders have the highest combined measures of Ability to Execute and Completeness of Vision. They may have the most comprehensive and scalable products. They have a proven track record of financial performance and an established market presence. In terms of vision, they are perceived as thought leaders, with well-articulated plans for ease of use, product breadth and how to address scalability. For vendors to have long-term success, they must plan to address the expanded market requirements for EIA, including support for multiple content types, support for the cloud, solid relevant e-discovery functionality and a seamless user experience.

Leaders must not only deliver to current market requirements, which continue to change, but also need to anticipate and begin to deliver on future requirements. A cornerstone for Leaders is the

ability to articulate how these requirements will be addressed as part of their vision for expanded archive management. As a group, Leaders are considered as part of most new purchase proposals, and have high success rates in winning new business. There are six Leaders in this Magic Quadrant: CommVault, Global Relay, HP Autonomy, Proofpoint, Symantec and ZL Technologies.

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## Challengers

Challengers can execute today, but have a limited or an evolving vision. They have capable products and can perform well for many enterprises. These vendors have the financial and market resources and capabilities to become Leaders, but may have elected to focus more heavily on one vertical industry or one EIA use case. The Challengers in this Magic Quadrant include Bloomberg, EMC, Mimecast, Smarsh and SilverSky.

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## Visionaries

Visionaries are forward-thinking, but their execution has not propelled them into a leadership position. These vendors are differentiated by product innovation, but they have not achieved the sales and marketing success required to give them the high visibility of Leaders. In the case of this Magic Quadrant, they may be hampered by their product integration or technical support execution. Visionaries in this year's Magic Quadrant are IBM and MessageSolution.

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## Niche Players

Niche Players are narrowly focused on an application, a market or a product mix, or they offer broad capabilities without the relative success of their competitors in other quadrants. Niche Players may focus on a segment of the market and do it well, or they may simply have modest horizons and lower overall capabilities, compared with competitors. Others are simply too new to the market or have fallen behind, and, although they're worth watching, they have not yet developed complete functionality or the ability to execute. Niche Players in this Magic Quadrant include ArcMail, Barracuda Networks, C2C, dataglobal, Google, Metalogix, Microsoft, OpenText and Sonian.

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## Context

The EIA market is healthy and growing rapidly. EIA is emerging as a commonly used technology underpinning for higher-level use cases supporting information governance, e-discovery, historical preservation of data and application retirement. Originating as a technology solution targeted specifically at email applications, the EIA market has expanded to include broad support for multiple content types. Basic functionality (including the ability to define retention policies, support advanced search, provide transparent access to data and export data for legal review) has become standard, and we see vendors differentiating their solutions based on a number of other emerging trends:

- Broader information governance concerns (regulatory compliance, business-focused retention and deletion of data, and managing aging data based on a clear understanding of its value) are beginning to surpass e-discovery as the primary driver for deploying EIA.

- Organizations are looking to archive and manage multiple content types, including (but not limited to) email, files, collaboration applications (such as Microsoft SharePoint), IMs, social media and Web page content.

- Archiving as a service (aka cloud archiving) has rapidly surpassed on-premises archiving as the preferred deployment model for most organizations. Gartner sees 60% to 70% of new or replacement email archiving implementations as being cloud-based.

- Aging on-premises archiving platforms are being replaced by more modern solutions, and migration from one archive to another, although difficult, is becoming commonplace.

- Storage capacity management, although less of a driver for EIA than information governance, is still a concern for many organizations.

This Magic Quadrant profiles vendors that offer, at a minimum, integrated email and some other content archiving utilized predominantly for information governance and e-discovery, with storage capacity management as a secondary benefit. Archiving of other content types, including structured application data, is discussed, but is not required for inclusion in this research. This research does *not* include the following:

- Pure HSM products
- Products designed to address storage growth via archiving, HSM or storage virtualization in very large-scale file environments
- Vertically focused archiving solutions that are tightly integrated with specific applications (for example, vendor-neutral archives within the healthcare vertical)

## Market Overview

Gartner tracks the market for distributed system archiving as a subsegment of the storage management software market called archiving. This market will continue to see strong growth, experiencing a five-year compound annual growth rate (CAGR) of 14.1% through 2017, from a baseline of $1.61 billion in 2012.

## The Trend Toward Management of Multiple Content Types

Historically, organizations initially deploy EIA solutions to address email content, and that trend continues. However, there are a number of factors that are causing many organizations to look beyond email.

The requirement for good retention, deletion and legal hold policy management goes beyond email content. Organizations that have successfully implemented email archiving have seen associated benefits in their ability to better organize their data, eliminate PC-based storage, find information when they need it, produce it in response to a discovery request, and, as a side benefit, reduce the size of their primary and secondary storage environments. These organizations have come to realize that these benefits are extensible to content beyond email, and are looking to implement policies and technologies that can do the same for social media, files, and Microsoft SharePoint and other content.

In some industries, such as financial services and the public sector, it has become important to be able to capture social media content (such as that generated via Facebook, LinkedIn and Twitter), as well as text messages, IM, Web pages, and even content residing in SaaS applications or cloud file-sharing services. This requirement for financial services is becoming mainstream and is highly dependent on an organization's requirements for regulatory compliance. Most vendors have responded and now offer the ability to support archiving of this content, either natively or via partners, such as Actiance or Socialware. Dodd-Frank compliance for swap trade reporting compliance and trade reconstruction has also brought voice data archiving into the picture. In addition, website archiving is a nascent technology that some vendors are beginning to offer.

Another trend that is emerging as an offshoot of an organization's desire to better manage its archiving and e-discovery processes is in-place management. This functionality offers the ability to identify data wherever it resides and either apply holds to the data without moving it to an archive or move it to a temporary archive at that point. This functionality is particularly useful for organizations that have large amounts of file data and do not want to move it to a central archive, but that have the requirement for policy-based retention and deletion. Some vendors have added this functionality directly to their archiving products (such as C2C), offering complementary products (such as Proofpoint Enterprise Governance) or partnering with third parties to deliver in-place hold. In addition, Microsoft and Google's governance for Exchange and Gmail centers around in-place hold. The primary mail repository resides within the same environment and is natively managed through the same tools as the primary mail.

Structured data archiving is not included in this year's EIA Magic Quadrant — there is no evaluation of the vendors' products or capabilities in this area. However, a strategy to support structured data archiving as part of a vendor's vision is considered favorably.

Overall, email is still the predominant content type being archived by EIA products (including content from cloud messaging applications like Office 365 and Gmail), with well more than half of overall archiving revenue in 2012 resulting from email archiving product sales. The advent of very large mail stores in the cloud — 50GB with Microsoft and 25GB with Google — has eliminated the need to archive hosted email for storage capacity reasons, therefore raising the importance of compliance and e-discovery.

## The Importance of Compliance and E-Discovery

Often, the customer's most important requirement is to facilitate and simplify e-discovery. All vendors describe their e-discovery functionality as it aligns with the EDRM (see Note 3), and most organizations that are looking closely at an e-discovery solution have become familiar with it as well. EIA vendors promote their archiving tools as being aligned with the information management stage of this model, and also offer varying degrees of functionality for identification, preservation, collection, review and analysis. At a minimum, e-discovery features should:

- Include the ability to set legal holds.
- Provide multiuser search capability with an interface that is targeted toward legal reviewers.
- Allow user tagging and export in one of several formats, including a native format for more extensive legal review.

This level of e-discovery functionality should be available for all supported content types.

Gartner continues to see the trend of more organizations becoming comfortable with bringing some of their e-discovery processes in-house (see "Magic Quadrant for E-Discovery Software"). E-discovery has become slightly more mainstream, and organizations are seeing it as a business process supported by policies and tools. Forward-thinking organizations have realized that, along with regulatory compliance mandates, it is part of a broader information governance strategy.

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## Archiving in the Cloud

The interest in archiving data using a cloud or SaaS solution has intensified. While cloud archiving can be cost-effective, the prevailing sentiment to simply give the problem of managing this data to someone else seems to be one of the most common reasons organizations cite for selecting cloud archiving. Cloud archiving is attractive to organizations of all sizes. There are thousands of these deployments, with the more well-known cloud archiving vendors each claiming 10,000 or more customers. Cloud archiving is also benefiting from the interest that organizations are showing in Office 365, Google Apps, and other cloud messaging and collaboration deployments. However, inhibitors to cloud archiving persist. Concerns include privacy (particularly in Europe), physical location of the archive, the location of the archive and organizational loss of control of the data. Despite these concerns about privacy and location, new EIA deployments in the cloud are increasing rapidly (see "Five Factors to Consider When Choosing Between Cloud and On-Premises Email Archiving Solutions").

Cloud vendors that meet the criteria are included in this EIA Magic Quadrant. In 2013, the inclusion criteria changed from requiring both email and file archiving functionality in order to qualify to requiring email and at least one other form of archiving, be it file content, social media content or IM content. Note, however, that most of the cloud vendors included here offer some file archiving, but this support is new in most cases. Cloud and on-premises solutions also are evolving differently, and archiving on-premises file content using a cloud-based EIA service may not materialize as a common use case. Most cloud archiving vendors offer support for multiple content types; however, these comprise things like IM, social media content, text messages and Web pages. Gartner predicts that EIA cloud vendors will offer support for files going forward, but the method by which it will be developed, purchased and deployed remains to be seen. In this area, EIA cloud vendors will see competition from cloud storage or cloud storage gateway vendors that are promoting their offerings as zero capital expense alternatives to on-premises file storage. It is interesting to note that, as a group, the cloud vendors ranked higher in this Magic Quadrant than did their on-premises-only competitors. This can be attributed to the high levels of customer satisfaction (customer satisfaction ratings are near perfect for all the cloud vendors evaluated), simple pricing, ease of deployment and use, and the remarkable growth rates of these vendors overall. Vendors that do not offer cloud-based archiving as an option are seeing their market share erode.

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## Upgrades and Migrations

Email archiving solutions first came to market in the 1990s and, due to SEC regulatory requirements, were broadly deployed in financial services. Other vertical industries followed suit, mostly to address storage growth issues, and, as a result, there are a large number of legacy on-premises systems deployed across organizations of all sizes. Skip forward 15 to 20 years, and we see that some of these systems are pushing the limits with respect to scalability (number of objects, size of the archive, indexing and search speed, infrastructure). As a result, most vendors have rearchitected their products, and, consequently, their customers are faced with the challenge of upgrading or migrating to a new solution. A significant number of organizations are opting to migrate to a cloud archive.

Migration has become not only a challenge, but also a bona fide business, and there are a number of vendors (including Akaibu, Globanet, TransVault Software and Trusted Data Solutions) that offer software and services to migrate customers from one archive repository to another. Archiving vendors partner with these specialty software providers, and charge accordingly. Customers should expect the process of migration to be lengthy and potentially expensive, depending on the amount of data to be migrated. The alternative is to leave previously archived data in the original system; most organizations elect not to do this, as the costs and risks to maintain the original system over the life of the archived data are high. All the vendors evaluated in this Magic Quadrant have done migrations for their customers.

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## Mergers and Acquisitions

Since the last EIA Magic Quadrant, the number of mergers and acquisitions in this space has dramatically decreased from prior years:

- In January 2013, IBM acquired StoredIQ.

## Vendors to Watch

Note that there are numerous vendors that offer archiving products specifically for messaging applications. The following list includes selected vendors that provide, or have plans to provide, support for integrated email and file archiving:

- **AXS-One, a Daegis company:** AXS-One offers AXS-One Central Archive for email, IMs, files, social media, SharePoint and SAP data. The product is part of a broader records management and e-discovery portfolio. It has a long history in the EIA market and is particularly strong in its support for Lotus Notes/Domino. AXS-One did not meet the minimum revenue requirements for this Magic Quadrant.

- **Gwava:** Gwava offers Retain Unified Archiving for email, mobile content and social media. Retain has a strong offering for GroupWise and also offers support for Gmail, Exchange and Office 365. Retain Mobile archives SMS, Multimedia Messaging Service (MMS) and call logs for BlackBerry and Android, while Retain Social supports Facebook and Twitter content, and e-discovery features are provided through Gwava eDiscovery Management. The vendor did not meet the minimum thresholds for inclusion in the Magic Quadrant.

- **Index Engines:** Index Engines offers Octane Archive an archiving appliance that supports files and email, and provides a unique capability to capture legacy content from backup tapes. The product is delivered as an appliance and was announced in January 2012 as an extension to the vendor's compliance and e-discovery product line. At the time of this Magic Quadrant analysis, Index Engines did not meet the minimum revenue requirements for its archiving product.

- **Sonasoft:** SonaVault is Sonasoft's email archiving software solution for Microsoft Exchange. Designed for SMBs, SonaVault Email Archiving & eDiscovery Appliance is available as a software purchase or as an appliance for a plug-and-play, all-in-one email archiving and e-discovery solution. Sonasoft also offers an Exchange migration and backup solution, along with an SQL Server backup tool. Data from multiple domains can be stored and searched within a single email archive. Sonasoft did not meet the minimum revenue or additional content types requirement for this year's Magic Quadrant.

- **Viewpointe:** The Viewpointe OnPointe private cloud-based offering centers around information governance for large organizations, namely in banking. The OnPointe platform utilizes proven industry technologies from vendors such as IBM, NetApp and ZL Technologies to create a scalable offering for information life cycle management of data with archiving and supervision as components. Viewpointe did not meet the criteria for the Magic Quadrant due to using third-party technology for the archive.

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