

Magic Quadrant for Enterprise Information Archiving

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Storage cost, e-discovery and compliance issues, met in part by archiving products, have spread beyond e-mail to encompass other data types. Gartner evaluates vendors offering enterprise information archiving products that provide management of e-mail and files.

WHAT YOU NEED TO KNOW

During the past decade, e-mail has been the predominate application targeted by enterprises for archiving. The reasons for this are clear and consistent: E-mail is an application that can consume large amounts of storage, and the associated data is largely unmanaged. In addition, the increase in legal discovery associated with e-mail has driven demand for e-mail archiving applications that offer basic e-discovery functionality. Gartner has been publishing a Magic Quadrant for E-Mail Active Archiving since 2002. These reports were designed to help enterprises identify a set of products to evaluate as part of an effort to better manage messaging data via an e-mail archiving initiative.

In the past 18 months, Gartner has seen an increase in end-user demand in addressing these same challenges for additional content types. Enterprises are experiencing rapid growth of user data (stored on file shares), Microsoft SharePoint and other unstructured content. Much of this content is infrequently accessed after a period of time. Enterprises are looking for products that can deliver policy-based retention management and disposition, as well as legal hold and early case assessment, in a cost-effective way. While records management can help address the retention of static content, it is challenged in managing the volume of content that e-mail and other office productivity tools generate, and many organizations are not mature enough in their records management programs.

Vendors have responded. At this point, many vendors that offer e-mail archiving have added support for file archiving and SharePoint archiving. Leading vendors are taking this expanded information-archiving approach a step further – they are increasingly adding support for instant messages, text messages, social networking content and, in some cases, even structured application data.

As a consequence of user demand and the availability of products to address these challenges, Gartner has discontinued the Magic Quadrant for E-Mail Active Archiving and is replacing it with the Magic Quadrant for Enterprise Information Archiving (EIA). This research evaluates vendors that offer an on-premises solution for integrated e-mail and file archiving, with optional support for SharePoint archiving and other content types.

Not all the vendors covered in this Magic Quadrant participated in the e-mail active archiving Magic Quadrant last year. There are new entrants that have now met the threshold for the number of enterprise customers that have deployed their e-mail archiving solutions along with file archiving. A few of the vendors have released new products or modules. Because the EIA Magic Quadrant specifies a requirement to archive both e-mail and files, some of the vendors that were profiled last year as part of the e-mail archiving Magic Quadrant have not been included in this research, because they offer *only* e-mail archiving.

Vendors are offering products that support multiple content types, with an increased focus on a transparent user experience, enhanced e-discovery (including more-advanced search capabilities), scalability improvements, and flexible policies for mailbox management and compliance. In addition, “cloud archiving,” or archiving offered via software as a service (SaaS), has become extremely attractive to many organizations, and EIA vendors are rearchitecting their products to support cloud storage. The e-mail archiving component of EIA products has stabilized and references report few issues, although both file archiving and SharePoint archiving are not as mature. Enterprises continue to face challenges regarding policy definition, ingestion of personal archive files and complex deployments. Vendors are highly competitive, enabling enterprises to negotiate pricing to their advantage.

Finally, as EIA products emerge that are built on new architectures, offer support for more content types and add better e-discovery features, enterprises are more frequently evaluating a move from an existing product to one of these updated or “next generation” products. Although it can be very costly and time-consuming to migrate massive amounts of archived data to a new system, enterprises are serious about information management and will swap out an older product for one that better meets their requirements.

MAGIC QUADRANT

While it is never a good idea to compare the placement of vendors in the Magic Quadrant to their position last year, due to market dynamics that occur during the course of a 12-month period,

Figure 1. Magic Quadrant for Enterprise Information Archiving



it is especially important to emphasize this point here. The EIA Magic Quadrant is a *new* document, in that it evaluates products that were not evaluated last year. E-mail archiving is only one component of the vendors’ overall solutions. Vendors that offered highly rated e-mail archiving products may have a weak file-archiving component or poor integration of the two, causing their positions to change relative to the stand-alone Magic Quadrant for E-Mail Archiving.

Placement on the Magic Quadrant (see Figure 1) is based on Gartner’s view of the vendor’s performance against the criteria listed below.

Gartner's view regarding vendor placement is heavily influenced by the more than 1,500 conversations on the topic of EIA during the past 18 months with Gartner clients. In addition, the Magic Quadrant methodology includes the solicitation of references from each vendor, and for this Magic Quadrant, Gartner conducted nearly 100 surveys and/or conversations on the vendor products. We learned how they are using the products, what they like and don't like about them, and why they decided to go with the vendors they selected. We also learned about their experiences with sales and support, and their opinions on vendor responsiveness to things like requests for enhancements. Prior to publication, each vendor has the opportunity to review its placement on the Magic Quadrant and the strengths and challenges listed, and to respond to any factual errors.

It is important to remember that the Magic Quadrant does not just rate product quality or capabilities and features. The product is an important part of the rating, but the vendor's ability to acquire customers and expand its presence in the market 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 in future development. This is particularly true in an emerging market such as EIA, where establishing leadership, vision and credibility will propel some vendors to the front of the pack.

Market Overview

The Trend Toward Management of Multiple Content Types

Gartner tracks the market for archiving as a subsegment of the storage management software market called hierarchical storage management (HSM) and archiving. This market will continue to see strong growth, experiencing a five-year compound annual growth rate (CAGR) of 22.3% through 2014. As noted above, the challenges that organizations face with respect to the management of e-mail data are increasingly being seen with file system data. Archiving products that can address both e-mail and files generally provide efficiencies across these content types, versus taking a siloed approach to management. For example, storage efficiencies can be gained via the ability to identify an attachment in an e-mail as the same as a file on a file share, and then store it only once in the archive. E-discovery efficiency can be gained as well, via the ability to search across, view and export multiple content types from one interface.

Enterprises are generally looking to start with e-mail, and add support for files at a later date. Most vendors have added support for Microsoft SharePoint content, but the end-user requirement to archive this content has not fully materialized. Vendors are beginning to report SharePoint archiving sales, however, and some vendors, such as EMC, Iron Mountain, Metalogix Software and Symantec, are investing heavily in promoting their SharePoint archiving solutions.

In January 2010, the Financial Industry Regulatory Authority (FINRA) released Regulatory Notice 10-06, which gives guidance on blogs and social networking websites for financial firms using these mediums for business and personal communication. This notice gives guidance on how firms should capture and supervise broker-dealer communications conducted via social networks. This has prompted many vendors to add support for this type of content, either natively or via integration with products from vendors like FaceTime and Socialware.

Other content types that enterprises are looking to manage, to varying degrees, include instant messages, images and documents generated by applications or scanned, and structured (database) data.

Structured Data as a Component of EIA

Drivers for structured data archiving (database archiving) are generally different from those for e-mail archiving and file archiving. Database archiving is more prevalent in larger organizations that have extremely large amounts of application data, and that are experiencing the high costs and performance issues associated with managing large databases. By archiving older application data, storage costs can be reduced and application performance can be improved. Most database archiving products offer modules that allow a subset of data to be extracted from an application for test or development use (again, improving efficiency). Database archiving is also being used for application retirement.

Where database archiving becomes interesting as a component of EIA is when some subset of application data needs to be retained for e-discovery or compliance purposes. In this case, database-archiving tools can identify business objects that can then be stored with the appropriate retention and deletion policies, and data can be produced as part of an e-discovery activity. Vendors that offer this capability include HP, IBM, Informatica and Solix Technologies. IBM is unique, in that its Optim database-archiving products are loosely integrated with its EIA solution. Informatica has established partnerships with Symantec and CommVault to offer joint customers the ability to store archived business objects in these EIA vendors' repositories. Informatica also partners with EMC on a solution that leverages EMC's Documentum xDB, a native XML database.

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

E-Mail Migrations

Enterprises are leveraging the introduction of an EIA product to facilitate e-mail application migrations, or, in some cases, vice versa. Most EIA solutions support Microsoft Exchange and IBM Lotus Domino; fewer offer support for Novell GroupWise. Some vendors offer the capability to manage data from multiple e-mail systems in the same repository, which can facilitate migration as older, archived messages can be accessible via the new system. Enterprises are also seeing migrations from one version of Exchange (e.g., Exchange 2003) to another (Exchange 2007, Exchange 2010) as an opportunity to implement archiving policies. The ability to apply deletion policies and PST (Microsoft Exchange personal archives) ingestion to data prior to or during an upgrade reduces the amount of data that must be migrated. A vendor's ability to support multiple messaging applications and PST ingestion is considered in this Magic Quadrant.

The Importance of 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 Electronic Discovery Reference Model (EDRM), and most organizations that are looking closely at an e-discovery solution

have also become familiar with it. EIA vendors promote their archiving tools as being aligned with the “information management” stage, 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 native format for more-extensive legal review. This functionality should be available for all supported content types, and some vendors have extended indexing and hold functionality beyond the archive, even as they offer this functionality as part of their archiving products. Gartner will be publishing an e-discovery Magic Quadrant in 2011, and some of the vendors profiled here will also be included in that research.

Although e-discovery is the most important driver for e-mail archiving, file archiving is still predominately driven by storage cost reduction and infrastructure optimization. One of the challenges associated with proactive e-discovery readiness for files is the determination of what policies to use for retention and disposition. File data can be very disparate, and developing detailed policies for retention is extremely difficult. It is much simpler to “archive all files older than x.” Even with such a general retention scheme, the data reduction capabilities across files and e-mail that are achieved when policies such as these are implemented are proving very attractive to organizations.

Archiving “in the Cloud”

The interest in archiving data using a cloud or SaaS solution has intensified. Organizations view aging data that they must retain for compliance or historical reasons as an appropriate content type to move to the cloud – this data is infrequently accessed, does not require rapid response time and is generally not core to the organizations’ day-to-day operations. While cloud archiving can be very 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 or SaaS. It is worth noting that although an organization can outsource physical data storage, it cannot outsource its responsibility to discover and produce content for legal and regulatory purposes. This deployment model is evolving rapidly, and organizations now have solid options for both on-premises and SaaS or hybrid solutions. Hybrid solutions consist of some component that resides on-premises that can provide additional processing prior to sending data to the cloud, such as bandwidth throttling, encryption or data reduction. In addition, hybrid solutions can provide tight integration with Active Directory or the e-mail system.

Cloud archiving is attractive to organizations of all sizes; however, most implementations are in organizations of a few hundred people or less. There are thousands of these deployments, however, with the more well-known cloud-archiving vendors claiming 10,000 to 20,000 customers each. Cloud archiving is also benefiting from the interest organizations are showing in hosted e-mail and Microsoft Business Productivity Online Services (BPOS), and other hosted collaboration deployments. In fact, some on-premises archiving vendors have added functionality to their products to archive data from BPOS back to an on-premises archive, where it can be managed holistically with other data.

Cloud vendors are not included in the EIA Magic Quadrant this year; however, a number of the on-premises vendors that are included, such as Autonomy, MessageSolution and CGS, offer their solutions both as an on-premises product and as a cloud service. Some vendors, such as CommVault, have products that are deployed on-premises, but have the ability to use the cloud as a storage target or as one of many storage targets. In all cases, the ability to offer cloud archiving is considered in the context of a vendor’s vision, strategy and road map, and not as a product requirement.

Integrated Backup and Archiving

Historically, some IT professionals (and vendors) have focused on archiving as a way to make backups “run better.” Organizations that deploy archiving as a way to improve backups do so by extracting old content from primary servers and storage devices, thus shrinking the amount of data that needs to be backed up. As a consequence, backups (and recoveries) are completed more quickly, and less backup storage and/or media are required. This is still a viable reason to deploy archiving, but given the importance of e-discovery and compliance, the development of integrated backup and archiving solutions has taken a back seat to the development of EIA solutions focused on index/search, retention policy management and other content-aware features applicable to information management use cases.

There are, however, some signs that these use cases (data protection and EIA) may come together, beyond the simple requirement to reduce the backup window via archiving tools. In many cases, organizations are being asked to produce electronically stored information from backup tapes as part of e-discovery. This is challenging, in that data is not generally indexed, but is stored in a backup format, and functions like advanced search, culling and tagging aren’t possible. Backups should not be used as archives when archiving is focused on e-discovery and compliance, and policies need to be developed that manage each function and retain data accordingly.

These scenarios indicate that there should be some synergy between retaining data for compliance and e-discovery, versus for data protection purposes. Today, there are only a few solutions that enable organizations to logically align backup retention with archive retention. In addition to a lack of solutions, what remains challenging is that, organizationally, the buyers for data protection solutions are different from those for archiving solutions, with different goals, objectives and mandates. Just as the legal and compliance officers have come to understand that they need to work with the IT organization to build out archiving strategies for retention, deletion and legal hold, going forward, backup administrators will need to engage with archiving professionals to understand how these solutions can work together to provide the appropriate value and risk management.

Mergers and Acquisitions

Since the last Magic Quadrant for E-Mail Active Archiving, there have been several mergers and acquisitions in the EIA space:

- In September 2009, EMC acquired Kazeon, to offer enhanced e-discovery as part of its SourceOne family of archiving and e-discovery products.
- In February 2010, Iron Mountain bought Mimosa Systems, to offer an on-premises EIA solution.
- In June 2010, Unify merged with Daegis, to offer enhanced e-discovery capabilities as part of its e-discovery and unified archiving strategy.
- In June 2010, Autonomy bought CA Technologies' information governance business, including its EIA product, CA Message Manager.
- In October 2010, IBM bought PSS Systems for policy management, including the enablement of defensible disposal.

Microsoft Enters the E-Mail Archiving Market

In November 2009, Microsoft released Microsoft Exchange 2010 with native support for archiving. This was a watershed event for the e-mail archiving industry, in that it both legitimized the use of archiving for Exchange data and made archiving accessible to all Exchange users who purchase the appropriate Exchange license. Additionally, it has put Microsoft in the position of competing with vendors that it had previously considered close partners in the e-mail archiving business.

Exchange 2010 archiving gives the administrator the ability to provision a secondary mailbox for each user that appears alongside the primary mailbox. This mailbox is set up as a repository for older mail and attachments, managed by data retention and deletion policies. The look and feel are similar to PST files, and, in fact, this feature should be considered a replacement for PSTs. Basic legal hold is supported, as are more-advanced legal review features, such as role-based multimapbox search, search results preview, optional deduplication of search results and annotation of reviewed items.

Exchange 2010 archiving is a good choice for organizations that have never implemented archiving and that are struggling with rapid, unmanageable growth of historical e-mail, or for organizations that are looking to replace PST files with a more efficient and secure archiving capability, while preserving the user PST experience. Organizations that need more-mature, feature-rich e-mail archiving and e-discovery solutions should continue to consider EIA products. Because there is no support for files or other content types beyond e-mail, Microsoft's archiving capabilities are not rated in this Magic Quadrant.

Market Definition/Description

EIA is the next step in the evolution of archiving that incorporates new products and solutions for archiving user files (e-mail, files

on file shares, instant messages and SharePoint documents) and, optionally, other content types, such as structured data. These products provide features such as data deduplication across content types, retention management, content indexing and at least basic tools for e-discovery, such as search and legal hold. Due to the complexity associated with managing multiple data types in an archive, EIA may more broadly encompass capabilities like federated archive repository management, while delivering common policy management for migration, retention and discovery.

EIA includes archiving of multiple content types (at least e-mail and files) into a centrally managed content archive:

- E-mail – Capture and archive all e-mail messages and attachments entering and leaving the company, and messages between users on an e-mail server, as unique, indexed records. Optionally support instant message archiving. Includes support for mailbox management (i.e., reducing capacity within the messaging application by moving messages and attachments to secondary storage, and preserving user access).
- Files – Identify and capture files based on policies for inclusion in the archive.
- SharePoint – Identify and capture all SharePoint content types (documents, lists, calendars, workflows) and associated metadata and attachments for inclusion in the archive.
- Structured data – Identify application and/or database business objects (transactions and associated business logic) for inclusion in an archive. In addition to storing information in a secondary database instance, store structured content in a format that can be accessed without the original application (such as XML).

Other criteria include:

- Support for data reduction (deduplication, single-instance storage or other) of content across e-mail, files and SharePoint (as appropriate).
- Stubbing or linking technology along with a policy engine to automatically prune active data. Remove stubs as they age, and offer users an alternative tool if access is needed.
- Access to the archive via a Web client and through the native application client (e-mail, SharePoint, etc.).
- Auditing capabilities to track access to archived records.
- Support for increasingly large archives (multiterabyte) offering multiple storage options for the archive (disk, optical and tape).
- Support for special-purpose content storage devices, such as those that offer tamper-proof storage.

- Personal data store migration tools and temporary offline local store options to eliminate the storage of content outside the control of the archive system (e-mail).
- Retention and disposition management for objects in the archive.
- Basic e-discovery capabilities, including search, legal hold and export.

Leading vendors offer:

- Sampling and management of the compliance supervision process for regulated broker-dealers.
- Products that are packaged or that integrate with tools to manage the discovery process (especially early case assessment). Includes partnerships with e-discovery vendors.
- Products that are packaged or that integrate with a records management solution.
- Support for archiving of Short Message Service (SMS)/PIN messages, including BlackBerry Enterprise Server.
- Some level of integrated structured and unstructured data archiving.

Inclusion and Exclusion Criteria

To be included in the 2010 EIA Magic Quadrant, a vendor must be the developer of the product, not just a reseller or value-added reseller (VAR). The company should have a growing base of customers and at least five enterprise customers (with 5,000 users or more) that are using the software in a production environment for e-mail archiving (mailbox management and compliance archiving), with at least three of those also using the product for file archiving, and that are able to be referenced to Gartner to support compliance with the criteria. Included vendors should have a presence in at least two geographies worldwide and should be industry-independent.

Added

No new vendors were added, as this is the initial release of the EIA Magic Quadrant.

Dropped

No vendors were dropped, as this is the initial release of the EIA Magic Quadrant.

Evaluation Criteria

Ability to Execute

The criteria for Ability to Execute are:

- **Product:** This is an evaluation of the features and functions of the vendor's EIA solution:
 - The product must support integrated e-mail and file archiving.

- Higher ratings are assigned for support for SharePoint, instant messages, SMS/PIN messages, and video/audio and structured data (applications and databases) – support for these content types is optional, but is considered favorably.

- Integration must support:

- Data reduction across multiple content types (e.g., deduplication, single-instance storage)

- Common management across content types for supported features (e.g., policy management, user definition, retention management)

- Full-text indexing and search for all content types

- The road map should support plans for continued integration of multiple content types.

- Higher ratings are assigned to solutions with strong archive architectures, policy-based archiving and mailbox management features (e-mail), 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 includes an assessment of the vendor's capabilities in all presales activities, and the structure that supports them, including pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

- **Market Responsiveness and Track Record:** This is the vendor's 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 website was effective.

- **Customer Experience:** This refers to the quality of the customer experience, based on reference calls and Gartner client teleconferences.

- **Operations:** This criterion assesses the ability of the organization to meet its goals and commitments in an efficient manner. Past performance is weighted heavily (see Table 1).

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	high
Overall Viability (Business Unit, Financial, Strategy, Organization)	standard
Sales Execution/Pricing	standard
Market Responsiveness and Track Record	standard
Marketing Execution	high
Customer Experience	high
Operations	low
Source: Gartner (October 2010)	

Completeness of Vision

A vendor's Completeness of Vision is evaluated based on its ability to convincingly articulate its future product direction and demonstrate innovation in meeting customer needs, enabling the vendor to more effectively compete in the market. The credibility of a vendor's vision is weighed against its past ability to execute against previously stated plans. Market understanding should be the guiding factor in new product development, to ensure that the engineered product meets customer needs. Managing the complexity of storage environments requires innovative approaches that will distinguish leaders and delight customers.

The criteria for Completeness of Vision are:

- **Market Understanding:** The ability of the vendor to understand buyers' needs and translate these needs into the appropriate features in their EIA products. Also included is the ability to anticipate market trends (e.g., 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:** A clear set of messages that positions the product and differentiates it from competitors, consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.
- **Sales Strategy:** The vendor's strategy for selling to its target audience, including an analysis of the appropriate mix of direct and indirect sales channels.
- **Offering (Product) Strategy:** The vendor's strategic product direction, including an analysis of its road map.
- **Business Model:** The soundness and logic of a vendor's underlying business proposition.

- **Vertical/Industry Strategy:** The vendor's strategy for meeting the specific needs of individual vertical markets and market segments (e.g., financial-industry-regulated employee supervision, or state and local government information retention and disclosure requirements).
- **Innovation:** Product leadership, and the ability to deliver archiving features and functions that distinguish the vendor from its competitors.
- **Geographic Strategy:** The vendor's strategy for penetrating geographies outside its home or native market (see Table 2).

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	high
Marketing Strategy	high
Sales Strategy	high
Offering (Product) Strategy	high
Business Model	low
Vertical/Industry Strategy	low
Innovation	standard
Geographic Strategy	standard
Source: Gartner (October 2010)	

Leaders

Leaders have the highest combined measures of an Ability to Execute and a Completeness of Vision. They have the most comprehensive and most scalable products. They have a proven track record of financial performance and established market presence. In terms of vision, they are perceived as thought leaders, with well-articulated plans for ease of use, and how to address scalability and product breadth. 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 can be expected to be considered as part of most new purchase proposals and to have high success rates in winning new business.

There are three Leaders in the EIA Magic Quadrant: Symantec, Autonomy and Iron Mountain. These vendors have the largest market footprint, and extensive features and functionality in their products. They also tend to be included in most shortlists for EIA selections.

Challengers

Challengers can execute today, but have a limited or 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 the important question is whether they have the understanding of market trends and market requirements needed to succeed in the future. In the case of EIA, it may mean that they've elected to focus more heavily on one content type or one EIA use case. They may not devote sufficient development resources to deliver products with broad market appeal and leadership features. The Challengers in this Magic Quadrant are EMC and CommVault. EMC introduced SourceOne as its new archiving platform in early 2009, and CommVault announced a new release of its Simpana platform in the second half of 2010. Gartner client inquiry on both vendors is increasing.

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 completeness of solution or the sales and marketing success required to give them the high visibility of Leaders. IBM is the sole Visionary vendor in this Magic Quadrant, with its Smart Archive Strategy that brings together a comprehensive approach and set of products for archiving.

Niche Players

Niche Players are narrowly focused on an application, market or product mix, or they offer broad capabilities without the relative success of 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 their competitors. Other Niche Players are simply too new to the market or have fallen behind, and, although worth watching, they have not yet developed complete functionality or the ability to execute.

Vendor Strengths and Cautions

Atempo

Headquartered in Palo Alto, California, Atempo is an 18-year-old company. It is best known for its distributed system backup product called Time Navigator. It entered the archiving market in 2008 with Atempo Digital Archive (ADA), its file archiving product, and Atempo Digital Archive for Messaging (ADAM), its e-mail archiving product. Both products leverage the media management layer of Time Navigator, which enables Time Navigator, ADA and ADAM to share storage devices among the three products. Archiving products represent a small portion of Atempo's overall revenue. The archiving products are available in North America and EMEA, and ADA was introduced into the Asia/Pacific region in 2010.

ADAM currently supports Exchange, GroupWise and other mail systems; however, support for Lotus Domino is on the road map. ADA has seen good growth in the media and entertainment vertical, due to strong integration with Apple Final Cut Server and other digital asset management applications, as well as its delivery of relevant key features, such as support for MXF and DPX formats, metadata management, and partial file restore of large media files. The company is leveraging its success in the media and entertainment industries to penetrate additional verticals that require support for large files, particularly large rich-media files.

In addition to selling its products stand-alone, the company offers bundled solutions targeted at different use cases: backup and archiving for the storage administrator; products for dedicated environments, such as Apple Final Cut Server; and e-mail and file archiving for compliance and e-discovery. Atempo has relatively few e-mail archiving customers, and will need to rapidly add functionality and step up its marketing and sales efforts to make progress in this area.

Strengths

- Extensive file-archiving capabilities for the media and entertainment industry, extensible to other industries that need to manage large rich-media files.
- Good partnerships with Apple and specialized network-attached storage (NAS) vendors Isilon and BlueArc. Atempo has shown a willingness to work closely with hardware and application providers in its target vertical, and customers report positive results.
- Excellent support for the Mac environment, in addition to support for Windows, Linux and Unix.

Cautions

- There is no common interface for policy management, reporting or search.
- ADAM cannot archive calendar items, tasks or contacts as part of its Exchange offering, and there is no support for SMS/PIN messages, instant messages or SharePoint.
- There is minimal e-discovery functionality; no legal hold, legal reviewer user interface, case management or tagging (these are all road map items). Role-based search and review, audits of activity on the archive, and export are supported.

Autonomy

Autonomy offers products for information management and information governance. It is one of the largest enterprise software companies, with a strong business and market position for archiving. It has grown its archiving as well as related e-discovery businesses both organically and via acquisition, including the acquisitions of Zantaz in 2007 and CA Technologies' information governance business in 2010.

Autonomy's archiving product is Autonomy Consolidated Archive. This product, announced in 2010, aggregates and consolidates the vendor's previously disparate offerings into one common platform based on its Intelligent Data Operating Layer (IDOL) technology, and is offered as an on-premises, cloud or hybrid solution. A new API enables Autonomy's on-premises product (previously known as EAS) and cloud solution (Digital Safe), along with the newly acquired CA Message Manager, to leverage common Autonomy Consolidated Archive functionality, including security, auditing, indexing and processing of data, as well as the underlying repository. Multiple content types are supported, including Exchange, Lotus Domino, GroupWise and other mail systems, as well as Windows, Unix

and Linux file systems, SharePoint, instant messages, and social networking content from sites such as LinkedIn, Twitter, Facebook and others. Autonomy can capture some structured content and store it in the consolidated archive as well.

Autonomy Consolidated Archive offers basic e-discovery functionality, and is complemented by products such as Autonomy End-to-End eDiscovery for e-discovery and Autonomy Records Manager to fully support the EDRM. Autonomy continues to grow its market share in e-mail archiving, as well as in the broader EIA market. New customer acquisitions continue to be strong as Autonomy maintains a strong focus on information governance with an extensive marketing program.

Strengths

- Underlying IDOL technology provides Autonomy Consolidated Archive customers with sophisticated classification, analytics and search capabilities, and provides an integration point for other Autonomy information management products.
- The vendor has an extensive set of large banks and financial services customers using its products for Securities and Exchange Commission (SEC) compliance supervision and archiving.
- The next-generation access model enables access to archived data in a familiar PST-like view from any e-mail client (online or offline) or mobile device, without the need for stub files or client-side software.

Cautions

- Autonomy focuses more on large customers and opportunities, so sales and support for midsize and smaller customers may not be as responsive.
- Pricing for the archiving product is higher than for comparable products.
- Autonomy EAS is resource-intensive.

C2C

C2C is a privately held 18-year-old company headquartered in the U.K. Its North American headquarters are in Massachusetts.

C2C offers two versions of its flagship on-premises archiving product: ArchiveOne Enterprise and ArchiveOne Express. The product first shipped to customers in 2003, and supports Exchange, Lotus Domino, instant messages, Windows file systems and SharePoint. Support for cloud storage is provided via integration with APIs from Nirvanix, Microsoft Windows Azure and i365. ArchiveOne Express is targeted at organizations with fewer than 200 users. ArchiveOne Enterprise scales up to meet the requirements of larger enterprises, and C2C currently services organizations with tens of thousands of users, although most of its customers have fewer than 5,000 users.

The vendor sells its products in North America and EMEA only. C2C has established some name and brand recognition; however, its small size makes increasing visibility difficult.

Strengths

- The archiving products offer simple implementation, with minimal infrastructure required to deploy.
- Searches can go across live and archived e-mail data, as well as across public folders, PSTs and file system data, returning one result set, and policies for copy or move to an archive can be executed from a “policy search.”
- Customers cite completeness of features at a low cost as a factor in purchasing the product.

Cautions

- Support for Lotus Domino is compliance capture only, with no support for mailbox management or Domino Web Access today.
- The largest production customer for file archiving is small, managing under 5TB.
- There is limited geographical coverage.

CGS

Computer Generated Solutions (CGS) offers a broad portfolio of business solutions. The New York-based company was founded in 1984. It first shipped its archiving product, Unlimited Mailbox, to customers in 2000.

The product is currently available for Exchange, Lotus Domino, GroupWise and other mail systems, as well as for file shares (Windows, Linux and Unix). SharePoint, instant messages and social networking content archiving are also supported. The company recently improved its capabilities for e-discovery via the release of a forensic auditing tool (Unified Forensic Auditor), which offers classification, audit trails, workflow and alerting, classification, and document redaction, as a complement to the e-discovery functionality that is included in its archiving product. CGS has a strong relationship with Microsoft; Unlimited Mailbox provides support for Exchange cloud offerings, including BPOS and Live@edu. This capability enables customers to archive data from Microsoft’s cloud services to Unlimited Mailbox on-premises, or to an archive hosted by CGS.

To date, the product has seen success predominately in state and local government, and education verticals. Although the company claims to have a few large archiving customers, most of its implementations are midsize. The Unlimited Mailbox product line is essentially run as a separate business within CGS and represents a small percentage of overall company revenue. Due to its size, its visibility as an archiving vendor is limited in the EIA market.

Strengths

- Common repository for all content types facilitates cross-platform e-mail application migrations.
- Supports index in place, which CGS calls “shadow archiving.”
- File and e-mail archiving are both included as part of one competitively and simply priced product. Unlimited Mailbox is available either as on-premises software or via a subscription-based SaaS offering, and can be deployed in any combination.

Cautions

- The number of Unlimited Mailbox customers is relatively small. Be sure to check references to ensure that the features you are interested in perform as expected.
- The user interface does not have a native application look and feel.
- Nearly all the vendor’s focus and customer base is in North America.

CommVault

CommVault is a publicly traded company headquartered in New Jersey. Founded in 1996, its initial offerings were backup software solutions, and, in 1997, it launched its first set of HSM capabilities. CommVault comes at the EIA market from a storage background, and has moved into the information management space with a set of products and features that addresses the needs of legal and compliance archiving buyers.

Its current product is Simpana Archive, which is sold with Simpana Search for index, search and e-discovery. Simpana Search is based on FAST indexing technology from Microsoft. Simpana Archive supports Exchange, Lotus Domino, other mail systems via SMTP and instant messages, as well as Windows, Unix, Linux, NetWare and NAS file systems, and SharePoint. Simpana Archive is part of a comprehensive data management platform that supports backup, archiving, replication and storage resource management (SRM). Simpana customers can take advantage of integrated core platform features like deduplication, encryption, compression, indexing and media management across these data management functions. This makes Simpana Archive a logical choice for customers using Simpana Backup and Recovery. In October 2010, CommVault launched Simpana 9, which introduces additional functionality focused on information governance. Simpana Archive is marketed as part of this information governance platform, which focuses on retention life cycle management, enterprise search, information workflow, records declaration, privacy and security, e-discovery, and compliance, again leveraging the core platform features. Simpana supports cloud storage APIs from Nirvanix, Iron Mountain, Amazon, Mezeo, Microsoft Windows Azure and EMC Atmos, which enable the cloud as an archive storage tier. Content Director is an add-on process and workflow engine that provides content classification and e-discovery functionality.

CommVault goes to market via an extensive set of partners in multiple geographies, and has recently reorganized its sales teams to focus one group on enterprise and strategic accounts, and another on small or midsize businesses. Sales to small or midsize businesses are delivered almost exclusively through channel partners. CommVault also maintains a number of technology partnerships and alliances, including Microsoft, Dell, Hitachi Data Systems, Group Logic, NTP Software, TransVault Software, Informatica and others.

Strengths

- The solution for data protection and information management is tightly integrated, delivering management and infrastructure efficiencies.
- Embedded SRM provides up to 250 reports covering numerous facets of the environment.
- Simpana support for file archiving is strong due to CommVault’s experience with legacy HSM product and customer base for that product.

Cautions

- Despite CommVault’s focus on simplification, product packaging remains confusing. To a large degree, this is due to the fact that common Simpana functionality is leveraged across multiple products and, therefore, is hard to pigeonhole into one product.
- There is no e-discovery case management, and support for third-party records management systems is limited to SharePoint MOSS Records Center.

EASY Software

EASY (Elektronische Archiv SYstem) Software is a small, Germany-based company focused on archiving and document management solutions. Its EASY Enterprise product has roots in SAP archiving, but has extended its functionality into broader archiving applications, including e-mail, files and SharePoint. The largest part of the installed base is still for structured content, such as SAP applications and data.

EASY Enterprise 3.1 supports Exchange and Lotus Domino, although Exchange is the larger part of the installed base. File-archiving and SharePoint-archiving capabilities have just been made available. Archiving functionality for unstructured content is very limited and does not support instant messaging.

EASY Software focuses primarily on Europe, and is dependent on its sales channel to drive business. The company has provided localized product support and implementation since 2000 in other geographies via its subsidiary presence in both the U.S. (EASY) and the U.K. (EASY Software [UK]).

Strengths

- Support for archiving of SAP applications and data
- Scalable repository architecture that can handle multiple content types
- Low-cost and easy-to-deploy solution

Cautions

- Installed customer base is still predominately European, so sales and support may be limited in other geographies.
- File archiving and SharePoint archiving still have yet to be proven, given their limited deployments.
- E-discovery capabilities are limited to export.

EMC

EMC offers its SourceOne portfolio of products for archiving, file visibility and e-discovery. SourceOne Email Management first shipped in April 2009 as a replacement for EMC's 10-year-old EmailXtender e-mail archiving product. The product supports Exchange, Lotus Domino, other mail systems via SMTP and instant messages, as well as Windows file systems and SharePoint. Support for SharePoint was made available in the first half of 2010, and the file system product was recently released, in the second half of 2010. The products are complemented by e-discovery and supervision products that work directly with information in the archive: SourceOne Discovery Manager and SourceOne Email Supervisor.

EMC has a long history with e-mail archiving and has leveraged its knowledge of the archiving market to build SourceOne from scratch. Existing EmailXtender customers are offered either an upgrade to SourceOne or a coexistence strategy (running both products simultaneously). SourceOne is a full-featured e-mail archiving product that includes support for mailbox management, compliance capture, policy management, customizable PST ingestion and data reduction, offline access, and other functionality expected from a mature offering. The file system product is less feature-rich (e.g., no reporting or auditing). SourceOne has been architected with scalability in mind, and can take advantage of virtual environments for increased processing requirements.

EMC supports a large set of partners with comprehensive training and accreditation programs, and its direct sales teams benefit from alignment with core EMC sales teams focused on tiered storage infrastructure, virtualization and backup, as well as with the EMC Exchange and SharePoint consulting practices.

Strengths

- The vendor offers simple pricing; one price per mailbox for e-mail archiving, with all features included as part of the price. SharePoint archiving and file system archiving are priced per user.
- EMC has made a significant investment in presales and postsales training, support and quality assurance for SourceOne, to minimize customer issues and enhance EMC's recognition as a credible player.
- EMC's acquisition of Kazeon enables it to offer complementary e-discovery functionality, particularly for content residing outside of the archive, as part of the SourceOne family of products.

Cautions

- SourceOne for File Systems is new. Customers should ensure that they are comfortable with a first-generation product, and check references as they become available.
- Large referenceable SourceOne customers are hard to find. Many of EMC's larger customers are in the process of moving from EmailXtender to SourceOne, and haven't fully implemented SourceOne.

HP

HP Integrated Archive Platform (IAP) provides a complete archiving solution with bundled software, storage and services, and is sold as an appliance. Recently, the hardware and software components have been unbundled (with HP IAP 2.1) to provide greater flexibility in upgrading the older hardware.

HP IAP has two different software components to support Exchange and instant messaging. E-discovery is supported by a partnership with Clearwell. HP has products to support database archiving and its HP TRIM product supports SharePoint for records retention. HP TRIM is integrated with the back-end storage; however, these other solutions require connectors to facilitate integration with IAP.

HP IAP has a strong presence in financial services, government and life sciences/healthcare. It also provides a specialized solution for medical image archiving. HP continues to be challenged in growing its archiving business, despite its breath of capabilities and scalability.

Strengths

- Comprehensive hardware/software archiving solution that requires minimal services and configuration to deploy
- Enterprise scalability with HP's Smart Storage Cell grid architecture
- Provides automated backup and disaster recovery based on HP Data Protector

Cautions

- File archiving supported via an OEM version of a third-party solution, and a third-party solution is required to support instant message archiving
- Does not support e-mail supervision
- Limited number of installs and lack of traction

IBM

IBM introduced its Smart Archive Strategy in 2009; it brings a unified approach to archiving, and also brings together IBM's broad set of products and solutions. IBM Content Collector (ICC) provides archiving modules for Exchange, Lotus Domino, and other mail systems via SMTP, as well as instant messages and social networking content. File archiving is supported for Windows, Unix, System z/Linux, Data ONTAP (IBM NSeries or NetApp) and Novell NetWare. SharePoint and SAP data and document archiving are also supported, while Optim Data Growth solutions provide the capability to archive structured application data and structured databases. IBM is able to extend its core archiving capabilities with tightly integrated records management, e-discovery, and classification with its broader set of what it calls its Information Lifecycle Governance products. In October 2010, IBM acquired PSS Systems, which when integrated with ICC will provide for more-effective policy management, including the enablement of defensible disposal.

ICC can be used for core archiving (e.g., e-mail storage management or e-mail compliance archiving), as well as to allow customers to leverage the content that they've collected in the archive. The product presents a task-based framework that enables customers to manage the content as part of its Enterprise Content Management (ECM) platform, or to apply advanced analytics or advanced contextual classification if desired, in addition to providing more-traditional, archive-based functions, such as records management and e-discovery. Because ICC has open APIs, additional content types and tasks can be supported via custom connectors. Optim data is supported in this fashion, as is social networking content via a relationship with FaceTime. Because ICC relies on IBM's ECM platform for the archive repository, it can take advantage of the ECM platform's integration with Tivoli Storage Manager (TSM) to deliver broad support for storage devices and HSM functionality.

ICC first shipped to customers in 2009, as a replacement for CommonStore for Lotus Domino, CommonStore for Microsoft Exchange, FileNet Email Manager and FileNet Records Crawler. ICC is a superset of these products, and existing customers are entitled to a no-fee upgrade to ICC and do not have to migrate existing archives. In addition to targeting large enterprise customers, the company has put together "starter packs" for smaller organizations or departments looking for basic archiving and e-discovery, including a preconfigured, bundled hardware and software delivery model together with the IBM Information Archive appliance. Because the IBM Smart Archive Strategy crosses IBM hardware, software and services, IBM is marketing and selling products via multiple internal sales channels.

Strengths

- Provides comprehensive and scalable archiving solutions with capability to extend into structured data with Optim, and broad use case support via integration with other Information Lifecycle Governance products
- Extensive worldwide market footprint with its direct sales force and channel partners
- Multiple deployment options ranging from on-premises to preconfigured appliance and cloud (delivered by IBM Global Technology Services)

Cautions

- ICC is best-suited for organizations using IBM's broader enterprise content management products, or planning to use them in the future.
- Supervision and compliance capabilities are limited. IBM views supervision as a data loss prevention (DLP) use case, and relies on a CA Technologies-Orchestria partnership.

Iron Mountain

Iron Mountain acquired Mimosa Systems in February 2010, which gave it a solution for on-premises e-mail, file and SharePoint archiving, as well as archive-related e-discovery. The acquired product, NearPoint, first shipped to customers in 2005, and is exclusively targeted at the Microsoft Windows environment (Exchange, Windows file shares, SharePoint). Functionality for native capture of instant messages and some social networking content (Twitter, Facebook) is available. With the Mimosa acquisition, Iron Mountain now offers solutions for on-premises, as well as cloud-based archiving for e-mail and files. Iron Mountain also offers separate cloud-based archiving solutions targeted at the financial services industry (SEC compliance, FINRA guidelines) and the medical community (medical image archiving, image hosting). Only the NearPoint on-premises solutions are evaluated in this Magic Quadrant.

NearPoint does not rely on journal capture for e-mail (although this is an option); rather, it uses log shipping to capture all changes made to the Exchange database. The product also offers Volume Shadow Copy Service/Extensible Storage Engine (VSS/ESE)-based capture, and support for shadowless archiving through NetApp SnapManager for Microsoft Exchange. During the course of the past 12 months, additional e-discovery capabilities related to case management and early case assessment, as well as usability improvements, have been a focus.

Iron Mountain has an overlay sales team focused on NearPoint, but has also enabled its extensive physical and digital sales team to sell the product. Customers should expect to see bundled solutions for e-discovery that include NearPoint with Iron Mountain's Stratify and Connected e-discovery products, which should make it easier to evaluate and purchase them. Nearly 80% of NearPoint revenue was derived from North America in 2009, and although the company has a few very large customers, the majority of its deployments are in midsize enterprises.

Strengths

- NearPoint's log-shipping capture methodology enables recovery and replication of the Exchange database in addition to archiving. NearPoint offers a Self-Service Retrieve application for granular object recovery.
- There is a deep focus on support for Exchange, including the capture of hosted Exchange data from BPOS and early support for Exchange 2010.
- There is strong support for SharePoint archiving, including capture of farm and site-level components, and the ability to perform both coarse- and fine-grain recovery.

Cautions

- Digital archiving remains a very small piece of Iron Mountain's overall revenue. Companies should assess the vendor's ability to be responsive to their requests for enhancements, the frequency of new releases and the competitive focus going forward by checking with references.
- Iron Mountain's portfolio of archiving and e-discovery products is extensive and may be confusing to some buyers.
- References report that file system archiving is less feature-rich and robust than e-mail archiving.

MessageSolution

MessageSolution is a privately held company that offers hosted and on-premises archiving via its Enterprise Archive Solution (EAS) for e-mail (Exchange, Lotus Domino, GroupWise and other mail systems), file systems (Windows, Unix and Linux), SharePoint, Quickr and instant messaging. The company has a global presence, with a particular focus in the Asia/Pacific region (China accounts for 20% of the company's revenue). MessageSolution was founded in 2002 and is headquartered in California.

The product is built using a component-based design and a distributed computing architecture to facilitate scalability. Archived data from various content types is stored in the same repository, enabling single-instance storage across different mail applications and file systems. Basic e-discovery capabilities are available as part of the Enterprise Archive Solution e-discovery product, including search results review for legal personnel, saved search results, collection folder support and litigation hold. Enterprise Email Archive Supervisor provides search and real-time monitoring of the e-mail archive, including activity tracking.

The company continues to focus on growing its worldwide network of resellers, and recently expanded its target buyer to include managed service providers willing to offer MessageSolution technology as their hosted archiving solution. As a small, young company, MessageSolution needs to continue to invest in marketing and sales to raise visibility and capture enterprise customers that can exercise all product functionality.

Strengths

- MessageSolution offers e-mail server migration products that enable customers to archive before migrating from one messaging application, such as GroupWise or Domino, to another, such as Exchange.
- Its products can be deployed as on-premises, SaaS or a combination of both.
- Deployment can be done via the Web by the MessageSolution system deployment team.

Cautions

- As a new-to-market company, MessageSolution is trying to compete with well-established players. It will need to continue to increase visibility via expanded marketing.
- References provided to Gartner were not using all the features promoted by MessageSolution.
- There are no file-archiving customers using the product in non-Windows environments.

Metalogix Software

Metalogix Software entered the archiving market in 2008, when it acquired archiving technology from H&S Software. Professional Archive Manager for Exchange (PAM for Exchange) was first released in 2004, and the company has grown its installed base to more than 3,000 customers. The majority of those customers are small or midsize businesses, although a few have 10,000-plus mailboxes and multiple terabytes of data under management. Metalogix Software also sells the product via an OEM relationship with a number of partners that have customers of all sizes. PAM for Exchange only supports Exchange for e-mail archiving, but also provides file system archiving support for Windows, Unix, Linux and NAS platforms (NetApp and EMC Celerra), and SharePoint archiving.

The vendor's focus is on comprehensive support for Microsoft platforms. The product supports a number of somewhat unique features, including integration with multiple search engines and preprocessing and postprocessing support for archive jobs.

Metalogix Software has focused much of its attention on growing its Microsoft content and data management business, including SharePoint archiving. It was one of the first to offer storage products for SharePoint that enable storage of BLOBs external to the SharePoint database. The vendor has been working on growing its North American presence, and increasing its channel presence and sales. Recently, it hired a new, experienced software management team that will be looking to balance the portfolio across products and geographies.

Strengths

- Comprehensive support for Exchange, SharePoint and file data management, including archiving
- Common HSM functionality and single-instance storage across all content types, including support for multiple copies of archived objects across a wide variety of media types, migration to alternate media and multitier support
- Basic e-discovery functionality (delegate search, tagging, legal hold, export) included as part of PAM for Exchange

Cautions

- Small base of file-archiving customers; prospects should ensure that they talk to reference customers that have deployed integrated file archiving and e-mail archiving in a similar configuration.
- Some dissatisfaction with product usability and quality, as well as with timeliness of new releases.

Open Text

Open Text is a publicly traded company based in Ontario, Canada, that offers Open Text ECM Suite as its flagship product. In the archiving world, the company is particularly well-known for the management and archiving of SAP content, in addition to its content management solutions. Open Text offers EIA as part of its ECM Suite. Its first EIA products were released in 1999 (Email Archiving) and 2004 (File System Archiving). Exchange, Lotus Domino, instant messages and social network content, as well as Windows file systems, SharePoint, and SAP data and document archiving are currently offered.

Email Archiving for Microsoft Exchange is tightly tied to another Open Text product called Email Management, which provides capture, classification and deletion of e-mail. Records management is a key capability that is provided for the archiving products as part of Open Text Enterprise Library Services. Open Text also provides e-discovery early case assessment through a partner. Cloud storage is supported via integration with APIs from Microsoft Windows Azure and Amazon.

Open Text products can be sold separately or as part of the ECM suite. In keeping with its focus on management of archived data as records, in 2009, the company bundled the Open Text Records Management engine with File System Archiving. Open Text is broadening its target customer, but is still predominantly focused on selling into its installed ECM customer base. Its installed base includes some financial services customers with large archiving applications (both in terms of number of users and amount of data stored).

Strengths

- Offers tight integration of archiving functionality with ECM Suite, which allows leveraging of features like records management
- Provides archiving across a broad range of content, including e-mail, files, documents, SharePoint and SAP
- Has a strong SAP relationship for reselling archiving solutions; it is the market leader for SAP archiving

Cautions

- Archiving solutions are best-suited for customers using ECM Suite, or those that consider archiving an element of their overall ECM strategy.
- Software license pricing for archiving is high, particularly for small or midsize businesses.
- Some Open Text customers have had issues with support and responsiveness in addressing their problems.

Symantec

Symantec offers Enterprise Vault for archiving of e-mail, files, SharePoint and instant messages. Enterprise Vault is a mature product, with the largest worldwide base of enterprise customers. The product is available for Exchange, Lotus Domino and other mail systems via SMTP, as well as instant messages and Windows file systems. E-discovery support is provided via Enterprise Vault Discovery Accelerator and Discovery Collector, and SEC compliance supervision is provided via Enterprise Vault Compliance Accelerator.

Enterprise Vault offers a number of features that further the level of usability that enterprises are demanding of their archiving products. For example, Virtual Vault is a new feature that enables users to manage and view their archived data using a familiar Outlook PST experience, whether online or disconnected from the network. Symantec is also moving forward with tighter integration between its backup and archiving products, and, in early 2010, the company released a version of Backup Exec that included an archiving option for small or midsize business customers based on Enterprise Vault code. The latest product releases provide further integration between Enterprise Vault and NetBackup. Support for Nirvanix storage as an archiving target is expected in late 2010/early 2011. Symantec takes a market-driven approach to offering support for multiple content types, adding support as customers demand it. Support for e-mail was followed by support for files; both have a large installed base. Symantec enhanced its SharePoint capabilities significantly in 2009, and has recently added support for Microsoft BPOS.

Symantec's size and market presence enable it to dedicate numerous engineering, support and sales resources to the support of Enterprise Vault. In addition, the company supports a global channel partner program that ensures that its partners are well-trained and motivated to succeed.

Strengths

- Symantec's large installed base gives it the ability to solicit usability feedback from a vast number of customers, which influences its development teams to build new features that are in lock-step with market requirements.
- There is broad support for hundreds of global partners, including training and accreditation.
- There are numerous technology integrations with third-party products.

Cautions

- While Enterprise Vault has been offered via partners as a hosted service for some time, this is not necessarily clear to Enterprise Vault prospects. Symantec needs to reconcile its on-premises Enterprise Vault strategy with its Symantec Hosted Services e-mail archiving offerings.
- The company has lost some market share to archiving vendors with more-comprehensive e-discovery stories. The release of Enterprise Vault Discovery Collector in the third quarter of 2010 enables Symantec to fill some existing gaps.

Unify

In June 2009, Unify acquired AXS-One. A year later, Daegis and Unify merged. Based in San Francisco, and with major offices in New York, Boston and Chicago, Daegis is an e-discovery services company founded in 1999. The new, merged companies bring together information management and archiving from Unify as a complement to the e-discovery and litigation support solutions from Daegis.

Unify Central Archive is a scalable archiving platform with good references. The product supports Exchange, Lotus Domino and other mail systems, as well as any platform that can be exposed as a standard file system, SharePoint and social networking content. Legacy data in the form of print files, reports and transactional files can be archived, as can transactional and database information in the form of reports via a module called Report Archive. E-discovery modules providing integrated search, review and legal hold, along with case management and other e-discovery capabilities, are available, as are modules for retention management and supervision. Support for Amazon cloud storage is available.

Unify's focus is on large customer opportunities ranging from 1,000 to 10,000 users. The company also has a strong base of customers in financial services because of its compliance capabilities.

Strengths

- Good support for Lotus Domino
- Supports archiving for a broad set of content types beyond e-mail, files and SharePoint, including social media, database and SAP
- Extensive e-discovery capabilities as a result of the integration of Daegis DocHunter for early case review and other legal requirements

Cautions

- Customer acquisition is challenging, given Unify's market footprint and sales channels.
- Administrative functions, such as logging and reporting capabilities, are weak.
- Upgrades require multiple steps, and decentralized configuration is difficult.

ZL Technologies

ZL Technologies offers its ZL Unified Archive product to meet the requirements of larger enterprises for integrated archiving of e-mail, files, SharePoint and instant messages. The product is available for Exchange, Lotus Domino and other mail systems via SMTP, as well as instant messages and social networking content. File system archiving is supported for Windows and Unix. ZL was founded in 1999, and the latest version 7.03 of its Unified Archive product was released in October 2010.

The product is built using a grid architecture that seamlessly directs processing power to activities that need it, such as indexing or PST ingestion. On-premises software deployments and cloud storage are supported as targets, and ZL has partnered with RenewData, i365 and Iron Mountain to provide this service. Migration between disparate mail systems is supported, as are AES and public-key infrastructure (PKI) encryption and key management. E-discovery functionality is provided by a separate, but integrated module, and a full-featured compliance supervision module is also available.

ZL maintains a number of strategic partnerships, including a partnership with Oracle (which resells the product under the name Oracle Universal Online Archive), as well as Renew Data and others. The product is available worldwide, and has done well in Japan; ZL generates 15% of its archiving revenue from this geography.

Strengths

- Scalable architecture that is fully functional on virtual servers. Current customers are managing billions of messages and/or documents within one repository, and reporting fast search times leveraging multiple, complex advanced search criteria.
- Defensible and comprehensive e-discovery capabilities, including analytics, data visualization, redaction and production, as well as tracking and monitoring of IT assets to facilitate the identification and preservation of these assets for legal purposes.
- Ability to support in-place archiving with data ingested into the archive as needed (i.e., generating a content index, but leaving data in place, with no migration to the consolidated archive).

Cautions

- ZL's approach to archiving and e-discovery is to provide all the components itself. This approach may leave organizations that are integrating ZL into an environment that utilizes other e-discovery tools with redundant functionality.
- Despite comprehensive functionality and excellent references, customer acquisition remains relatively low. We believe that ZL needs to continue to invest in promoting its products and technology to see additional growth.

Vendors Added or 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 appearing 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. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets and skills, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability (Business Unit, Financial, Strategy, Organization): 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 pre-sales activities and the structure that supports them. This includes deal management, pricing and negotiation, pre-sales support and the overall effectiveness of the sales channel.

Market Responsiveness and Track Record: Ability to respond, change direction, be flexible and achieve 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.