

Magic Quadrant for Enterprise Information Archiving

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On-premises and cloud enterprise information archiving are contributing to organizational needs for meeting e-discovery and compliance requirements, and reducing primary storage costs. Gartner evaluates vendors offering products that provide archiving for email, file and other content types.

What You Need to Know

During the last decade, email was the predominate application targeted by enterprises for archiving. The reasons for this are clear and consistent: Email 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 email has driven demand for email archiving applications that offer basic e-discovery functionality. Beyond the requirement for simple on-premises archiving that meets these requirements for email, other trends have emerged:

- Gartner has seen an increase in end-user demand in addressing these same challenges for additional content types, including user data stored on file shares, Microsoft SharePoint and other on-premises unstructured content.
- There has been increasing interest in archiving and managing content that originates in the cloud, including hosted email data, instant messages, text messages and social media content.
- Archiving deployment models have shifted: Organizations are more frequently considering archive as a service (or cloud archiving) as a solution for their aging data management challenges.
- File archiving for very large volumes of data is emerging as a requirement in organizations that had previously addressed their data growth issues by simply adding more storage.

In the vast majority of organizations, much of the content that needs to be managed is infrequently accessed after a period of time. Enterprises are looking for cost-effective products that can deliver policy-based retention management, as well as legal hold, as a way to manage this aging data. While records management can help address the retention of static content, the volume of content that email and other office productivity tools generate is often more than records management systems were designed for, and many organizations are not mature in their records management programs.

Vendors have responded to these customer requirements for broader management of aging data. Many vendors that have historically offered support for email archiving have added support for file and SharePoint archiving. Leading vendors are taking this expanded information archiving approach a step further — they are adding support for text messages, social media content and, in some cases, even structured application data. This Magic Quadrant profiles vendors that offer, at a minimum, integrated email and file archiving. Archiving of other content types is discussed, but is not required for participation in this research.

Year over year, 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. The email archiving component of enterprise information archiving (EIA) products has stabilized, and references report few issues; however, file and SharePoint archiving are not as mature. Enterprises continue to face challenges on policy definition, ingestion of personal archive files, scalability and complex deployments. Cloud archiving solutions address a number of these challenges. Vendors are highly competitive across cloud and on-premises solutions, enabling enterprises to negotiate pricing to their advantage.

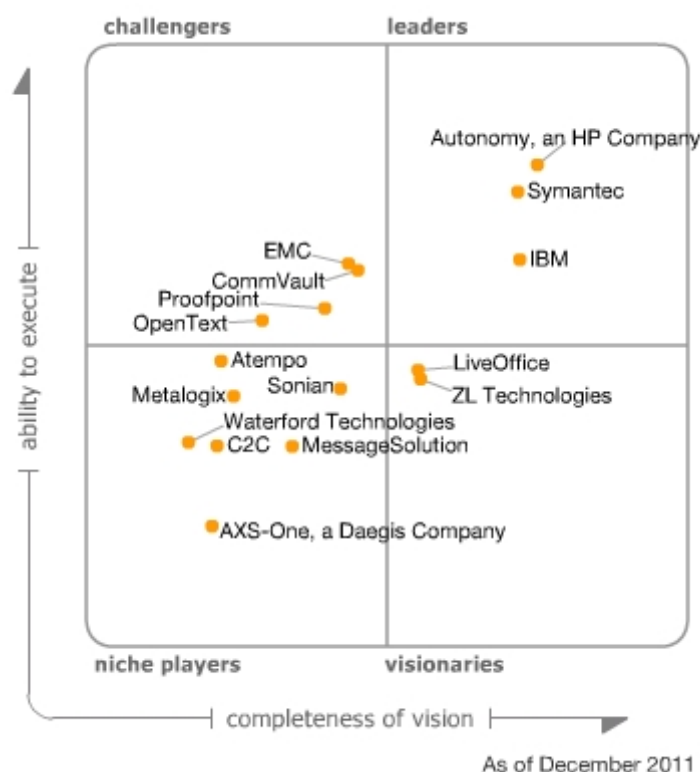
Finally, as EIA products emerge that are built on new architectures, offer support for more content types, add better e-discovery features or offer their services in the cloud, enterprises are more frequently evaluating a move from an existing product to one of these updated or "next generation" products.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

Magic Quadrant

It is never a good idea to compare the placement of vendors in the Magic Quadrant with their position in the previous year, due to market dynamics that occur over the course of a 12-month period. In this case, evolving use cases, new cloud solutions and the closely related e-discovery software market, along with evolving partnerships and acquisitions, make the EIA a fast-changing market.

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

Figure 1. Magic Quadrant for Enterprise Information Archiving



Source: Gartner (December 2011)

Gartner's view regarding vendor placement is heavily influenced by our more than 1,000 conversations over the past 12 months with Gartner 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 nearly 100 conversations with vendor references. We learn how they are using the product, what they like and don't like about it, and why they decided to go with the vendor they selected. We also learn about their experience with sales and support, and their opinions on vendor responsiveness to aspects 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 a product's quality, 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 a market like EIA, where establishing leadership, vision and credibility will propel some vendors to the front of the pack.

Market Overview

Gartner tracks the market for distributed system 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 17.5% through ¹2015. This is down somewhat due to the sluggish macroeconomic climate (last year, we reported a projected 22.3% five-year CAGR), and to a drop in performance from some leading vendors. Negative growth forces are counterbalanced by an organization's need to respond to ongoing legislative changes, and to a broader focus on information governance, including the management of social content as a corporate resource.

The Trend Toward Management of Multiple Content Types

The challenges organizations are facing with respect to the management of email data are increasingly being seen with file system data. Archiving products that can address both email 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 email is another identical instance of 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 generally start with email (email represented over 70% of archive revenue in 2010), then 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, Metalogix and OpenText 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 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 Actiance or Socialware.

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

Structured Data as a Component of EIA

The drivers for structured data archiving (database archiving) are slightly different than those for email 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 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. Database archiving vendors that offer this capability include HP, IBM, Informatica and Solix. IBM's 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.

Structured data archiving is not included in this year's EIA Magic Quadrant — 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.

Email Migrations

Enterprises are leveraging the introduction of an EIA product to facilitate email application migrations or, in some cases, vice versa. Some vendors offer the capability to manage data from multiple email systems in the same repository, which can facilitate migration as older, archived messages can be accessible via the new system. Most EIA solutions support Microsoft Exchange and IBM Lotus Notes; fewer offer support for Novell GroupWise. Enterprises are also seeing migrations from one version of Exchange (Exchange 2003 or Exchange 2007, for example) to another (Exchange 2010) as opportunities to implement archiving policies; being able to apply deletion policies 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, as well as 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 become familiar with it as well. EIA vendors promote their archiving tools as being aligned with the information management stage of this model, and in addition 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 functionality should be available for all supported content types. Note that some vendors have extended indexing and hold functionality for data beyond what is stored in the archive (in-place legal holds), but offer this functionality as a feature of their archiving product.

Although e-discovery and compliance are the most important drivers for email 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

days. Even with such a general retention scheme, the data reduction across files and email that are achieved when policies such as these are implemented are proving attractive to organizations.

Archiving in the Cloud

The interest in archiving data using cloud or software as a service (SaaS) solutions 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 organization's 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 archiving. It is worth noting at this point that while an organization can outsource physical data storage, it cannot abdicate its responsibility to discover and produce content for legal and regulatory purposes. This deployment model is rapidly evolving, and organizations now have solid options for on-premises and SaaS or hybrid solutions. Hybrid solutions consist of some component (usually an appliance) 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 email system.

Cloud archiving is attractive to organizations of all sizes; however, most implementations are with small to midsize organizations. There are thousands of these deployments, 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 Microsoft Office 365 and other hosted messaging and collaboration deployments. In fact, some on-premises archiving vendors have added functionality to their products to archive data from Office 365 back to an on-premises archive, where it can be managed holistically with other data.

Inhibitors to cloud archiving do persist, however. Concerns include privacy (particularly in Europe), physical location of the archive (organizations should ask where the cloud data centers are located) and organizational loss of control of the data. New EIA deployments in the cloud are increasing, despite concerns about privacy.

Cloud vendors that meet the criteria are included in the EIA Magic Quadrant this year for the first time. All cloud vendors included here offer some file archiving, but this support is new in all cases. Gartner chose to include these cloud vendors although their file archiving capabilities are new and, in some cases, references were light, due to the importance of cloud within the broader EIA market. 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 instant messages, social media and text messages. Gartner predicts that EIA cloud vendors will offer support for files going forward, but the method by which will be developed, purchased and deployed remains to be seen. In this area, EIA cloud vendors may see competition from cloud storage or cloud storage gateway vendors that are promoting their offerings as inexpensive alternatives to on-premises file storage. Vendors included in this research that currently offer support for file archiving as part of their services include LiveOffice, Proofpoint and Sonian. In addition, a number of on-premises vendors such as Autonomy, MessageSolution and Symantec

offer both an on-premises product and a cloud service. Gartner profiled cloud email archiving vendors in "Outsourcing Email Archiving: 2Q11 Vendor Update."

Microsoft Enters the Email Archiving Market

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

Exchange 2010 archiving gives administrators the ability to provision a secondary mailbox for each user that appears alongside his or her 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 that of PST files, and this feature should be considered a replacement for PSTs. Basic legal hold is supported, as well as more advanced legal review features like role-based multibox 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, are struggling with rapid, unmanageable growth of historical email or are looking to replace PST files with a more efficient and secure archiving capability, while preserving the user's PST experience. Organizations that need more mature, feature-rich email archiving and e-discovery solutions should continue to consider EIA products. As there is no support for files or other content types beyond email, Microsoft's archiving capabilities are not rated in this Magic Quadrant.

Mergers and Acquisitions

Since the last email active archiving Magic Quadrant, there have been a number of mergers and acquisitions in the EIA space:

- In May 2011, Autonomy bought Iron Mountain's digital business, including its archiving, e-discovery, and online backup and recovery solutions.
- In May 2011, Symantec acquired privately held Clearwell Systems, an e-discovery vendor.
- In October 2011, HP acquired control of Autonomy.

Market Definition/Description

EIA is the next step in the evolution of archiving that incorporates new products and solutions for archiving user files (email and files on file shares) and, optionally, other content types such as instant messages, SharePoint, structured data and social media content. 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 within an archive, EIA may more broadly encompass

capabilities like federated archive repository management, while delivering common policy management for migration, retention and discovery.

Inclusion and Exclusion Criteria

To be included in the 2011 EIA Magic Quadrant, a vendor must:

- Be the developer of the product and not just a reseller or value-added reseller (VAR).
- Support a growing base of customers, including at least five enterprise customers (5,000 users or more) that are using the software in a production environment for email archiving (mailbox management and compliance archiving), with at least three of those using the product for file archiving.
- Provide five references to Gartner to support compliance with the criteria:
 - At least three references using on-premises products for email archiving should be using it for file archiving as well.
 - Pure-play cloud vendors (those without an on-premises offering) should provide three file archiving references for customers of any size, as file archiving in the cloud is new functionality, and vendor services in this area are not mature.
- Have a presence in at least two geographies worldwide, and be vertical-industry-independent.
- Provide their solution as an on-premises software product, a SaaS offering or some combination thereof.

Added

New vendors include LiveOffice, Proofpoint, Sonian and Waterford Technologies.

Dropped

Vendors dropped from the Magic Quadrant include HP, CGS and Easy Software.

Evaluation Criteria

Ability to Execute

Ability to Execute criteria are:

- **Product/Service:** An evaluation of the features and functions of the vendor's EIA solution means that:
 - The product must support integrated email and file archiving.
 - Integration must support the following:

- 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 for support for Microsoft SharePoint, instant messages, 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 assigned to solutions with strong archive architectures, policy-based archiving and mailbox management features (email), e-discovery and retention management capabilities.
- **Overall Viability (Business Unit, Financial, Strategy, Organization):** Viability 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 covers the vendor's capabilities in all presales activities and the structures that support them. This includes pricing and negotiation, presales support and the overall effectiveness of the sales channel.
- **Market Responsiveness and Track Record:** This addresses 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 has 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 covers the quality of the customer experience, based on reference calls and Gartner client teleconferences (inquiries).
- **Operations:** This is 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 (December 2011)

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 satisfy customers.

Completeness of Vision criteria are:

- **Market Understanding:** This is the ability of vendors to understand buyers' needs, and to translate these needs into the appropriate features in their EIA products. It includes 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 assesses whether there is a clear set of messages that positions the product and differentiates it from competitors, and is consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.
- **Sales Strategy:** This covers 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:** This is an evaluation of the vendor's strategic product direction, including an analysis of its road map.

- **Business Model:** This addresses the soundness and logic of a vendor's underlying business proposition.
- **Vertical/Industry Strategy:** This covers 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 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	standard
Marketing Strategy	high
Sales Strategy	high
Offering (Product) Strategy	high
Business Model	low
Vertical/Industry Strategy	standard
Innovation	standard
Geographic Strategy	standard

Source: Gartner (December 2011)

Leaders

Leaders have the highest combined measures of an ability to execute and a completeness of vision. They may have the most comprehensive and 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, 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 they 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 this Magic Quadrant — Autonomy, IBM and Symantec.

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 the important question is whether they have the understanding of market trends and the market requirements needed to succeed in the future. In the case of EIA, it may mean that they have elected to focus more heavily on one content type or one EIA use case. They may not devote sufficient development, marketing or sales resources to deliver products with broad market appeal and leadership features. The challengers in this Magic Quadrant include CommVault, EMC, OpenText and Proofpoint.

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. Visionaries in this year's Magic Quadrant are LiveOffice and ZL Technologies.

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 Atempo, AXS-One, C2C, MessageSolution, Metalogix, Sonian and Waterford Technologies.

Vendor Strengths and Cautions

Atempo

Atempo is a privately held company based in Palo Alto, California. Atempo was founded in 1992 as a provider of backup and recovery software, and began offering Atempo Digital Archive for Messaging (ADAM) and Atempo Digital Archive (ADA) in early 2008. ADA is offered specifically for file archiving. The company works closely with partners in the media and entertainment industry such as Apple and Avid, as well as a number of other digital asset and media asset management vendors to deliver solutions targeted at the management of large files. The company is one of the few vendors to offer native support for Novell GroupWise as part of its email archiving feature set. Due in large part to Atempo's French origins, a large percentage of its business is within Europe, and it currently supports over 140 VARs worldwide. The products are particularly attractive to

Atempo Time Navigator backup customers, as they are integrated at the storage layer, and can share certain data management functions such as deduplication across both backup and archive. Despite this apparent synergy, however, Atempo has seen excellent growth related specifically to ADA, and the majority of new ADA deals are not sales to existing Atempo Time Navigator customers. Atempo's sales strategy is to focus on ADA, and only offer ADAM opportunistically or as part of a holistic EIA deal.

Strengths

- Atempo file archiving works well within specific vertical industries that manage large volumes of unstructured data, including video (media and entertainment, high-performance computing and life sciences), and should be considered by organizations with creative departments managing unstructured content.
- The products are competitively priced; customers report that Atempo is very willing to negotiate, and is a pleasure to do business with. Atempo is responsive and willing to go the extra mile to work with customers and partners to address issues.
- There is excellent support for the Mac environment, in addition to support for Windows, Linux and Unix.

Cautions

- ADAM offers only minimal e-discovery functionality, and is more appropriate for organizations looking for mailbox management as their primary requirement.
- There is no support for SharePoint, IM, SMS or other content types as part of an EIA solution set.
- Some references report that while Atempo is responsive, larger development efforts (new features and large-scale bug fixes) take longer than expected.

Autonomy, an HP Company

At the time of this analysis, Autonomy was a publicly traded company with dual headquarters in the U.S. and the U.K. In October 2011, HP acquired control of Autonomy for approximately \$10 billion in cash (Autonomy's revenue was \$870 million in fiscal-year 2010). Autonomy will be operated as a separate business unit headed by Mike Lynch, the company's founder and CEO. It currently offers a full suite of products for EIA, e-discovery and information governance. It has grown its archiving businesses both organically and via acquisition, including the purchases of Zantaz in 2007, CA Technologies' information governance business in 2010 and Iron Mountain's digital business in 2011. Autonomy offers its products and services in a variety of deployment models, including appliance, on-premises and cloud. Beyond archiving, Autonomy's product suite gives it multiple points of entry to potential archiving clients. Autonomy's products are well-suited to clients in highly regulated industries, with compliance, archiving and supervision features that meet the needs of these users. The product does particularly well for visionary clients that ultimately wish to tackle longstanding enterprisewide information management and governance issues.

Strengths

- Autonomy's Intelligent Data Operating Layer (IDOL) platform technology provides functionality that is integrated into all of its archiving products, and offers sophisticated search and review capabilities. It also provides an integration point for other Autonomy information management products.
- Autonomy addresses the needs of large, highly regulated and sophisticated clients very well. It is well-regarded by internal legal departments that appreciate its power and speed in searching for data in large archives.
- Autonomy continues to expand its cloud installed base and can provide large organizations that are archiving data to the cloud as references.

Cautions

- Autonomy offers one of the most expensive products on the market, although it is more competitively priced for midsize businesses.
- As Autonomy is integrated into HP (at the time of this writing), uncertainty as to the ultimate direction of the company and success of the business will remain.
- Some Autonomy customers express dissatisfaction with sales and support; Autonomy is tackling this with its Customer Liaison program.

AXS-One, a Daegis Company

AXS-One is a division of the e-discovery services company Daegis, founded in 1999 and based in Roseville, California. In 2010, Daegis merged with Unify, which had acquired AXS-One in 2009. In order to reestablish what has become for customers a somewhat confusing identity, the company is reinvesting in the AXS-One brand by going to market as AXS-One, a Daegis Company. As a result of the integration of these three companies, the portfolio of offerings not only includes archiving, but also e-discovery technology and services. AXS-One's Central Archive is a scalable archiving platform best known for its ability to handle large volumes of Lotus Domino mail, although it supports Exchange and other mail systems. AXS-One can archive content from anything that can be exposed in a standard file system, along with SharePoint and social media. 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 uCool Report Archive. Legal case management and supervision modules are available, as is support for Amazon cloud storage. AXS-One has lost market share in the past few years, resulting in a restructuring of the business in 2011. The company is currently working on better global account management, and investing in additional marketing to regain lost ground.

Strengths

- There is good support for Lotus Domino, and excellent e-discovery capabilities for early case assessment and other discovery-related tasks.

- A range of content types, including file systems, SharePoint, social media, database data and SAP content, can be archived within globally distributed common repositories supporting federated management and search.
- Having a long history in the EIA market gives the company an excellent understanding of what's required for EIA products.

Cautions

- Customers report difficulty with configuration, patching, upgrading and a dependence on Daegis professional services not only to upgrade, but also to make system changes of any significance due to the technical complexity of the system. The company has made addressing these issues a development priority in 2012.
- Some customers report that search across large archives fails in unexpected ways that often require investigation and rework to run them again.
- AXS-One has lost market traction over the past few years as a result of merger/acquisition activity, and corporate refocusing on EIA products is under way.

C2C

C2C was founded in 1993 and is a privately held company with headquarters in the U.K. C2C offers two versions of its flagship on-premises archiving product: ArchiveOne Enterprise and ArchiveOne Express. ArchiveOne supports Exchange, Lotus Domino, instant messages, Windows file systems and SharePoint. Support for cloud storage and disaster recovery is provided via integration with APIs from Amazon. C2C's ArchiveOne Express is software packaged for small implementations (fewer than 200 users). ArchiveOne Enterprise supports a broader set of functionality, including archiving, e-discovery and retention management for data within or outside the archive, and is appropriate for much larger implementations. The vendor recently released new e-discovery functionality, spanning the left side of the EDRM model, from information management through processing and export of data for review. C2C now also supports in-place litigation hold so that data can be preserved, with an optional migration to the archive. A new focus on large enterprise deployments and an increase in North American business show that C2C is executing well on its strategy, but it remains one of the smaller players in the market.

Strengths

- The archiving products offer simple implementation, with a minimal infrastructure required to deploy.
- Searches can go across live and archived email 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

- The company's small size makes growth and visibility difficult.
- Although C2C now has extensive e-discovery functionality inside and outside the archive, this occurred too late for Gartner to do reference checks with in-production customers.
- The company is focusing its sales and marketing efforts in North America, the U.K. and France. As such, there is limited coverage in other geographies.

CommVault

Based in Oceanport, New Jersey, and publicly traded, CommVault was incorporated in 1996 as an offshoot of Bell Labs AT&T Network Systems. CommVault is best known for its backup and recovery products, and its customers have historically seen the company's archiving offerings as an extension of backup, focused on data management and storage optimization. This view is slowly changing, as customers begin to understand the breadth of functionality available as part of Simpana archiving, including competitive support for e-discovery and compliance. CommVault's offerings for EIA are part of its Simpana portfolio, which it broadly markets as information management software. Simpana provides modules for email, file, SharePoint and SAP archiving, as well as support for e-discovery and compliance based on its Simpana Search module. In 2010, file archiving revenue grew faster than email archiving, and over 75% of CommVault archiving customers are using the product for both email and file archiving. All products are available from CommVault directly; however, the majority of CommVault archiving revenue is via its reseller channel and a broad set of partners, including Dell, Microsoft, Hitachi Data Systems and NetApp. To date, Simpana archiving has been deployed mostly in midsize environments, although it does have a number of large customers. The products are well-suited for midsize to large enterprises that have a focus on e-discovery and compliance, but due to CommVault's continued focus on the backup market (and its ongoing success here), it continues to struggle with the right messaging, and with obtaining an entry point for information governance, compliance and e-discovery buyers.

Strengths

- Simpana is an integrated platform supporting backup, archiving and replication, as well as common data management functions such as deduplication and indexing. This enables policy alignment across these areas, as well as efficient use of server and storage resources.
- Strong file archiving — Simpana supports a broad set of file systems and features, and over 250 storage resource management (SRM) reports are included with the file archiving module.
- CommVault's vision for archiving is comprehensive, and the road map for new functionality is extensive. It includes support for cloud archiving (beyond the current support for cloud as a storage target), healthcare, media- and entertainment-specific offerings and integration of endpoint device protection into the archive story.

Cautions

- Due to the tight integration between backup and archiving and the efficiencies that can be gained, it may make the most sense for Simpana archiving to be deployed along with Simpana backup. This means that organizations interested in Simpana archiving may need to consider a change to their backup strategy to leverage the true power of the Simpana solution.
- CommVault has greatly simplified its pricing in the last 12 months. However, due to the integrated and modular nature of the Simpana platform, pricing remains more complex than that of other vendors.
- CommVault's strong go-to-market focus on backup and recovery leads to lack of visibility with legal buyers who are looking for e-discovery solutions.

EMC

EMC offers its SourceOne portfolio of products for archiving, file visibility and e-discovery. The products support Exchange, Lotus Domino other mail systems via SMTP and instant messages, as well as Windows file systems and SharePoint. 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. Two years ago, SourceOne replaced an older product, EmailXtender, and customers were offered an upgrade or a coexistence strategy, and many have done the migration. Because of its heritage with EmailXtender, EMC had an existing body of users from which it gathered requirements to build SourceOne. As such, the product has a full complement of email and content archiving features, including standard mailbox management, compliance supervision, policy management, PST ingestion, data reduction and offline access. Because EMC customers have large archives, SourceOne was built to be highly scalable, and to run in virtualized environments to optimize processing. EMC has many partners and supports them with strong training and accreditation programs. SourceOne is sold by a small overlay sales team within EMC; this sales team benefits from its relationship with the larger EMC storage sales force, and a significant percentage of deals comes through this channel.

Strengths

- EMC has long experience with large archives and a complementary suite of hardware and software products that supports all aspects of file management, including single-instance and compliant storage, back up and virtualization, allowing for the possibility of a single-vendor solution.
- The company offers simple per-user pricing for mailbox management, file and SharePoint archiving.
- EMC has a good partner ecosystem to help solve multiple storage and data management problems, with a large ecosystem of consultants and internal professional services to supplement core product offerings.

Cautions

- File archiving does not have all the functionality that clients would like to see, as these components are newer to the market.
- SourceOne Discovery Manager provides e-discovery functionality for content that resides in the archive only; broader support for discovery of content that resides outside the archive requires that customers consider supplemental solutions either from EMC (Kazeon) or from other vendors.
- EMC's strategy for offering EIA in the cloud is not as comprehensive as its competitors.

IBM

Headquartered in Armonk, New York, IBM offers a number of products as part of its IBM Smart Archive Strategy. The strategy has evolved since its 2009 introduction to provide an Information Lifecycle Governance (ILG) solution suite consisting of elements for archiving, e-discovery, records management and governance. The IBM ILG solution suite is targeted at CIOs and general counsel decision makers to support the information management needs of the enterprise. Last year's acquisition of PSS Systems provides information governance and policy management capabilities across the IBM ILG solution suite. The Smart Archive for the IT component of the suite addresses the archiving needs for unstructured content and structured data with IBM Content Collector (ICC) and Optim, respectively. ICC supports 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 N series or NetApp) and Novell NetWare. SharePoint and SAP data and document archiving are also supported. Complementary products are available for records management, e-discovery and classification. ICC can be deployed with non-IBM enterprise content management (ECM) platforms, but typically is found where customers have IBM ECM solutions such as IBM FileNet or IBM Content Manager, and can leverage them for the archive repository and utilize their integration with Tivoli Storage Manager (TSM). Customer feedback has been positive with respect to functionality and support. IBM SmartCloud Archive was launched in July 2011, with full records management and e-discovery capabilities to address the growing demand for archiving cloud services.

Strengths

- The IBM ILG solution suite provides a comprehensive and scalable solution to support archiving, extended records management, e-discovery and information governance.
- IBM supports archiving for a broad range of content types, including structured data with Optim Data Growth solutions.
- IBM has an extensive worldwide market footprint for sales and support with its direct sales force and channel partners.

Cautions

- ICC is best suited for organizations that are using IBM's ECM products to leverage the integration and archive repository.
- IBM SmartCloud Archive is relatively new, and has yet to be proved, compared with other cloud archiving solutions.
- IBM's ILG solution is comprehensive, but market messaging is complex. Solutions may get lost in the IBM sales' large portfolio of hardware, software and services.

LiveOffice

LiveOffice is a privately held company located in Torrance, California, founded in 2002. It is a cloud-only solution, offering services for EIA and e-discovery. LiveOffice supports Exchange, Domino and GroupWise email archiving, along with SharePoint and social media via partners. It is integrated with and can capture content from Office 365 and salesforce.com, along with content hosted by large file transfer vendors Box.net and Dropbox. As more companies move to cloud-based email and other off-premises solutions, LiveOffice is well-positioned to capitalize on this rapidly growing market trend. LiveOffice has a focus on strategic partnerships, with partners like Symantec and Microsoft driving a significant amount of business. LiveOffice has acquired thousands of customers, but most of these are small. For enterprises that would like to adopt cloud archiving solutions, but are concerned about security, LiveOffice manages its facility and customer data according to stringent, documented security procedures, including physical data center certifications (SAS 70-II and International Organization for Standardization [ISO] 27001-2005), technical data security and administrative security.

Strengths

- LiveOffice's e-discovery and compliance capabilities are highly rated among its users.
- As a pure-play EIA and e-discovery SaaS vendor, LiveOffice is in a position to offer very aggressive, per-mailbox pricing.
- LiveOffice is available via numerous partners, and continues to work to establish integration points between its solution and other solutions (particularly e-discovery solutions) a customer may have in house.

Cautions

- Clients have reported unscheduled downtime with LiveOffice as recently as March 2011.
- Although most clients have had good experiences with LiveOffice customer support, some have reported long response times and a general lack of attention to their issues.
- File archiving is currently limited to support for file content stored via cloud services like Box.net or Dropbox.

MessageSolution

Based in Milpitas, California, MessageSolution is a privately held company that offers hosted and on-premises archiving via its Enterprise Archive and eDiscovery Platform for Email, File Systems and SharePoint. The product supports Exchange, Lotus Domino, GroupWise and other mail systems, as well as Windows, Unix and Linux file systems, SharePoint and IBM Quickr.

MessageSolution has a global presence, with a particular focus in the Asia/Pacific region (China accounts for 30% of the company's revenue). The product is built using a component-based design and a distributed computing architecture to facilitate scalability. Various content types are stored in the same archive repository, enabling single-instance storage across different mail applications and file systems. Basic e-discovery capabilities are available as part of the Enterprise eDiscovery Suite, including search results review for legal personnel, saved search results and collection folder support and litigation hold. The company continues to focus on growing its worldwide network of resellers, and has expanded its target buyer to include managed service providers (MSPs) willing to offer MessageSolution technology as their hosted archiving solution.

Strengths

- MessageSolution archiving is offered via a number of MSPs that report it is easy to use and administer.
- Deployments can be done via the Web by the MessageSolution system deployment team.
- MessageSolution offers email server migration products that enable customers to archive before migrating from one messaging application, such as GroupWise or Domino, to another, such as Exchange.

Cautions

- With a maturing archiving market, MessageSolution is limited by its visibility and marketing capabilities. It will need to increase its investment in marketing, while expanding its sales channels.
- A limited number of customers is using file archiving (no Linux or Unix customers to date).
- Customers cite minimal documentation and first-level support response as areas for improvement.

Metalogix

Privately held Metalogix was founded in 2001 and is headquartered in Washington, D.C. The company launched its first archiving products as a result of the acquisition of H&S Software in 2008, and currently provides support for Microsoft Exchange and SharePoint, as well as Windows and Unix file shares. Metalogix has made a name for itself as a vendor of SharePoint data management solutions (including migration, archiving, storage management and data protection), bolstered by its acquisition of SharePoint vendor BlueThread Technologies in 2010. Also in 2010, new executive leadership resulted in more focus on go to market, product branding and channel expansion. As a result, Metalogix's archiving and SharePoint businesses have experienced

significant growth, and the company currently claims nearly 4,500 customers for its archiving solutions. Most customers are small to midsize, and have implemented Metalogix's Archive Manager primarily for storage management. Metalogix sells about 55% of its software via the channel. In 2010, GFI Software acquired Sunbelt Software, which had been selling Archive Manager as Sunbelt Exchange Archiver. As an outcome of this transaction, Metalogix has established a direct relationship with the Sunbelt Exchange Archiver user base, assuming responsibility for support contracts and transitioning them to the latest release of the product under the Metalogix Archive Manager name.

Strengths

- Archive Manager is reasonably priced — among the lowest priced offerings for EIA.
- Metalogix's focus on SharePoint appeals to organizations looking for SharePoint archiving, particularly as part of an overall SharePoint data storage strategy.
- Search capabilities include the ability to search archived and production email, as well as PST files.

Cautions

- Archive Manager's limited e-discovery functionality may not be enough for organizations that are implementing archiving in support of moderate to heavy e-discovery and compliance workloads.
- There is no support for content beyond Exchange, SharePoint and files.
- While simplicity and ease of installation is a competitive strength in single-archive server environments, customers report that setup, configuration and management of larger environments can be difficult, particularly in enterprise environments supporting high availability and clustering for multiple archive servers.

OpenText

OpenText is a publicly traded company based in Ontario, Canada. The company offers OpenText ECM Suite as its flagship product. In the archiving world, OpenText is particularly well-known for the management and archiving of SAP content. OpenText 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 supported. Email Archiving for Microsoft Exchange is tightly tied to another OpenText product called Email Management, which provides capture, classification and deletion of email. Records management is a key capability that is provided for the archiving products as part of OpenText Enterprise Library. OpenText also provides basic e-discovery functionality, including search, collection and legal hold with its archiving products, with identification, preservation, collection and Early Case Assessment (ECA) functionality outside the archive provided through a partner. Cloud storage is supported via integration with APIs from Microsoft Windows Azure and Amazon. OpenText 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 OpenText Records Management engine with File System Archiving. OpenText is broadening its current target customer scope, but is still predominantly focused on selling into its installed ECM customer base.

Strengths

- The newly consolidated email archiving solution includes mailbox management and journaling functionality, support for mobile access and integration with classification technology from OpenText's 2010 Nstein acquisition.
- Tight integration of archiving functionality with the ECM Suite allows leveraging of features like records management.
- SAP is a reseller of OpenText SAP archiving solutions; OpenText is a leader in the SAP archiving market.

Cautions

- OpenText archiving is best suited for those with an existing investment in OpenText's full ECM Suite, or those that consider archiving an element of their overall ECM strategy.
- OpenText's focus on information governance and records management may make it inappropriate as a solution for simple file archiving or simple EIA use cases focused predominately on storage optimization and mailbox management.
- Due to the underlying ECM approach to archiving that incorporates a focus on business rules and granular retention, implementation can be complex, and some customers report that implementation costs can be high.

Proofpoint

Based in Sunnyvale, California, privately held Proofpoint was founded in 2002 as an email management service company focused on security and compliance. In 2008, Proofpoint acquired Toronto-based Fortiva to provide cloud archiving, e-discovery, compliance and mailbox management for Microsoft Exchange. Proofpoint has expanded these capabilities to offer support for multiple content types, including Bloomberg Mail, instant messages, files and social media. Data is hosted in multiple data centers in North America, Europe and Canada according to customer requirements for privacy and regulatory requirements. An on-premises appliance enables tight integration with Active Directory, advanced encryption of customer data prior to leaving a customer's premises and mailbox management via stubbing (as an option). Proofpoint customers are large and generally have sophisticated e-discovery, compliance and supervision requirements. The company partners with Microsoft to offer archiving to its Office 365 customers that need advanced functionality. In addition, Proofpoint has achieved Federal Information Security Management Act (FISMA) certification, which enables it to meet strict security requirements mandated by federal agencies. Interest in cloud archiving deployments continues to grow at a rapid pace, and Proofpoint is well-positioned to take advantage of enterprise interest in this model by virtue of its highly scalable and secure infrastructure. Reference customers report that issues are

minor, Proofpoint's responses are fast, and that they feel extremely comfortable with Proofpoint as a vendor.

Strengths

- SLAs guarantee a 20-second response time for any search, regardless of the complexity or amount of data. Proofpoint facilitates this via leading-edge cloud infrastructure within its data centers.
- Patented DoubleBlind Encryption guarantees that Proofpoint does not have access to customer data at any point; data is protected while in transit and at rest.
- Proofpoint's service is used extensively by legal and compliance officers, as well as business users, who cite the product's advanced search capabilities and ease of use as strengths.

Cautions

- Support for file archiving is new, and is currently only appropriate for e-discovery and supervision use cases. Archived files are accessible via the email archive interface, and are displayed as an attachment to a message
- Proofpoint is not as well-known for its archiving solutions as it is for its security services; consequently, it is not always included in customer shortlists.
- Partnerships with Microsoft are subject to change based on Microsoft's product investments.

Sonian

Based in Newton, Massachusetts, Sonian is a privately funded cloud services provider focused exclusively on archiving. The company received its first round of funding in March 2007 and released its first archiving service in March 2008. From a handful of individuals, the company has grown rapidly, and today supports over 8,000 customers (managing over 3.5 billion objects) via its service. The service provides support for numerous messaging applications and related content, including the most common (Exchange, Google and Domino) and undersupported GroupWise. Sonian is one of the first cloud email archiving vendors to add support for files. The company goes to market almost exclusively through partners (its goal is 85%), and the solution is white-labeled by numerous service providers, including IBM (with support for LotusLive), Rackspace, Webroot and mindSHIFT. Sonian's road map favors partners as well, including, for example, an extended API that will enable partners to integrate archiving directly into their applications. The service provides support for basic e-discovery features such as legal hold, advanced search and export, and some compliance supervision features (random sampling and postreview). Sonian's archiving installed base predominately comprises small organizations, but the majority of the company's recent growth has come from organizations with over 1,000 users, and 25% of the customer base has more than 4,000 users. The service is appropriate for service provider partners and companies looking for highly available, scalable archives hosted in the public cloud.

Strengths

- Since Sonian hosts its platform on the Amazon cloud, the solution is highly scalable, and performance is excellent (indexing at speeds of up to 7.2 million objects per hour and high-volume, sophisticated search results in seconds).
- Pricing is extremely competitive — almost disruptively so — due to Sonian's cost model.
- All references cited Sonian's responsiveness, vision and rapid execution as strengths.

Cautions

- Support for files is new — organizations should check references and work with Sonian to understand how to best implement file archiving within the context of the service.
- Despite an excellent website and collateral marketing resources, Sonian remains unknown. It relies largely on partners for outbound marketing, which means it may not be considered in deals due to lack of awareness.
- As a new vendor in this market, Sonian offers a solution that lacks some functionality and is in "catch-up" mode.

Symantec

Symantec is a publicly traded company headquartered in Mountain View, California. It offers Enterprise Vault (EV) for EIA, a product that has a long and solid presence in the archiving market. Symantec's vision for EIA encompasses a focus on scalability, intelligence (the company recently integrated its Data Loss Prevention [DLP] technology into EV, packaged as a classification feature) and support for multiple content types (a broad range of content types is supported). The company added a cloud service, Enterprise Vault.cloud, in 2010 to address cloud demand, and is putting equal marketing and sales focus on on-premises and cloud solutions. In 2010, the company leapfrogged over many of its competitors in the e-discovery space via its acquisition of Clearwell Systems. With market share now inclusive of cloud solutions, Symantec has seen its market share erode, and it lost its No. 1 position in the market to Autonomy. Although the company had established a presence in financial services as an early provider of compliance supervision, Gartner is witnessing an archiving product turnover in this vertical market as customers move to cloud archiving solutions (Autonomy and Bloomberg). However, new EV functionality, the new cloud offering and the Clearwell acquisition should ensure that Symantec remains a leading and visionary player. Inquiries to Gartner on EV remain high, and the product is well-suited for clients looking for a mature product with strong mailbox management coupled with e-discovery.

Strengths

- Symantec focuses heavily on customer feedback and input to the EV road map, and the current product is feature-rich. The company has an excellent understanding of what is required of EIA and e-discovery solutions, and adjusts its road map according to market dynamics.

- Symantec has increased the number of worldwide technical specialists supporting EV, and its staff now includes more than 100 e-discovery specialists as a result of the Clearwell acquisition. The company does an excellent job of partner-enablement, and customer support is rated highly.
- The Virtual Vault feature (released in version 8.0, SP3) that enables access to archived email via a seamless Outlook experience has won praise from Symantec customers.

Cautions

- The most recent version of EV (EV10) is a significant upgrade, and Symantec has done much to hide the complexities from users and administrators. Initial upgrades have gone smoothly, but larger upgrades have not yet begun.
- Some customers report dissatisfaction with EV's PST ingestion.
- For organizations using advanced functionality, EV requires more maintenance than some competitive solutions, and references report that file archiving is not as mature as email archiving.

Waterford Technologies

Waterford Technologies is a privately held company located in Irvine, California. The company offers MailMeter and related products specifically for email and file archiving. MailMeter supports Microsoft Exchange, Lotus Domino and Ipswitch IMail, with options for e-discovery and investigation, regulatory and policy compliance, email storage management and email usage monitoring. File Analyzer and Archiver are the company's offerings for file archiving for Windows. As a low-cost product focused on basic archiving and e-discovery, some features and capabilities lack functionality and maturity such as its search, security and results viewing. Waterford introduced its MailMeter Cloud Archive solution in February 2011, a Linux-based solution that supports Microsoft Exchange, Lotus Domino, Novell GroupWise, Google Apps and Zimbra. This solution is offered to hosting providers that want to deliver email archiving solutions. The company's revenue is split nearly 50/50 between North America and Europe, although they do support a small number of customers in Asia.

Strengths

- Waterford Technologies' email and file archiving solutions are competitively priced. File archiving is priced per server, with no charge for storage capacity.
- MailMeter provides numerous reports detailing message usage according to various criteria with drill-down capability to the message content. File Analyzer offers similar capabilities for file system data.
- References cite ease of management and the "hands-off" nature of the products, meaning the product can be deployed and largely runs itself.

Cautions

- Waterford sells mostly through its direct channel. In order to expand its market position, it will need to further develop its indirect channel.
- Most customers indicate that MailMeter is easy to implement, but references for file archiving cite issues and difficulty with file archiving implementations.
- The cloud archiving solution is still in early development, with few hosting providers.

ZL Technologies

A privately held company based in San Jose, California, ZL Technologies offers ZL Unified Archive for archiving of multiple email applications, files (Unix and Linux), SharePoint, instant messages and other content types. The product is built using a unified platform on a grid architecture that supports large repositories, and seamlessly directs processing power to activities that need it, such as search indexing or PST ingestion. ZL maintains total control of its source code, and promotes its unified platform approach for all archiving applications, content types, delivery options (on-premises and cloud), storage, OSs and indexing options as a differentiated vision for large-scale information management. Migration among disparate mail systems is supported, as are Advanced Encryption Standard (AES) and public-key infrastructure (PKI) encryption and key management. E-discovery functionality is provided by an integrated module; full-featured compliance supervision and records management modules are also available. Most customers are using the archiving product for email, with an increasing percentage using the product for file and other content. The product is particularly appropriate for large-scale environments with varied content and/or more complex e-discovery requirements. In 2011, ZL introduced a cloud archiving solution, and signed on partner SunGard as an infrastructure provider. ZL also OEMs its solution to RenewData to provide hosted e-discovery services. ZL's business is largely North American, with 20% of its revenue coming from Asia (predominately Japan). The product is available worldwide.

Strengths

- ZL Unified Archive provides a highly scalable architecture for archiving, e-discovery and records management that can support billions of messages and/or documents within one repository, with fast ingestion and search.
- The e-discovery capabilities of ZL Unified Archive provide enterprise-capable functionality, including preservation, collection, processing, review, analytics, data visualization, redaction and production.
- The product provides the ability to support in-place archiving with data ingested into the archive as needed.

Cautions

- Customers have highlighted that ZL Unified Archive is a complex product to implement; although this can be expected due to the complex nature of ZL's large enterprise customers,

references note that this and the product's user and administrative interfaces could be improved.

- ZL Technologies' customer acquisitions continue, albeit at a slower pace than larger competitors, despite a solid product platform and good references. ZL plans to address this with more promotions at industry conferences and additional marketing activities, particularly in the areas of e-discovery and records management.
- The product is more expensive than EIA products aimed at the midmarket, but it is priced to compete with more complex EIA solutions.

Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

"Magic Quadrants and MarketScopes: How Gartner Evaluates Vendors Within a Market"

"Outsourcing Email Archiving: 2Q11 Vendor Update"

"Outsourcing Email Archiving: 2Q11 Market Update"

"Enterprise Information Archiving Transforms the Strategy and Approach for Archiving"

"Vendors Expand Enterprise Information Archiving With Support for Files: How to Select the Right Solution"

"Recommendations for an Enterprise Information Archiving Dashboard"

"Microsoft Introduces Simple Email Archiving With Exchange Server 2010"

"First Service Pack for Microsoft Exchange 2010: Finishing the Job"

Evidence

¹"Forecast: Storage Management Software Market, Worldwide, 2008-2015, 2Q11 Update" and supporting Gartner research.

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, 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 (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 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 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 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.

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