

The Forrester Wave™: Information Archiving Cloud Providers, Q4 2016

The 13 Providers That Matter Most And How They Stack Up

by Cheryl McKinnon

October 25, 2016 | Updated: October 26, 2016

Why Read This Report

In our 28-criteria evaluation of information archiving cloud providers, we identified the 13 most significant ones — Actiance, Barracuda, Bloomberg, Erado, Global Relay, HPE, Microsoft, Mimecast, Proofpoint, Smarsh, Sonian, Veritas, and Viewpointe — and researched, analyzed, and scored them. This report shows how each provider measures up and helps enterprise architecture (EA) professionals make the right choice.

Key Takeaways

Global Relay, HPE, Actiance, Microsoft, Smarsh, Bloomberg, And Veritas Lead

Forrester's research uncovered a market in which Global Relay, HPE, Actiance, Microsoft, Smarsh, Bloomberg, and Veritas lead the pack. Sonian, Proofpoint, Mimecast, and Viewpointe offer competitive options. Erado and Barracuda lag behind.

EA Pros Seek Cloud Archiving Services That Balance Usability With Compliance

Archiving, especially for regulated industries, is shifting away from on-premises deployments to adoption of cloud services. EA professionals and their information governance stakeholders seek scalable, predictable subscription services to meet their email, message, and content archiving needs.

Cloud Architecture, Breadth Of Integration, And Investment In Analytics Are Differentiators

On-premises deployments and hosted vendor-managed services are giving way to vendors that offer multitenant software-as-a-service (SaaS) models, leverage big data architectures, and invest in analytics. Integrations beyond email and messaging apps set vendors apart as comprehensive approaches to archiving gain customer favor.

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Notes & Resources

Forrester conducted demo-based evaluations in July and August 2016 and interviewed 13 vendor and user companies: Actiance, Barracuda, Bloomberg, Erado, Global Relay, Hewlett Packard Enterprise (HPE), Microsoft, Mimecast, Proofpoint, Smarsh, Sonian, Veritas, and Viewpointe.

Related Research Documents

- [Archiving Platforms Evolve Into Sources Of Insight And Corporate Memory](#)
- [How To Archive Personalized, Contextualized Web Experiences](#)
- [Market Overview: Information Archiving, Q2 2015](#)

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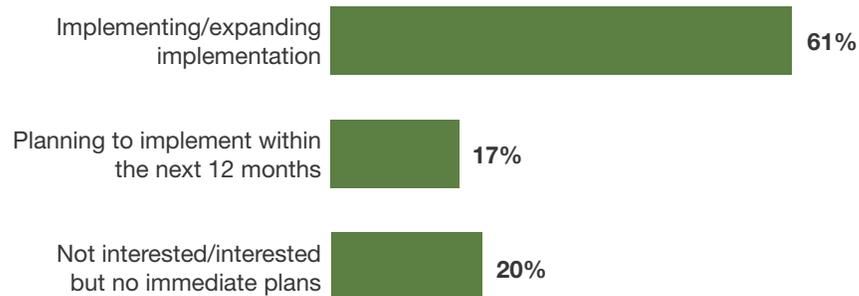
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Regulated Industries Embrace Cloud For Essential Archiving Use Cases

Technology management and security professionals are increasingly comfortable with — if not preferring — cloud services to meet their compliance-driven archiving needs. In mid-2016, 61% of client security decision-makers indicated their firms had implemented or were expanding their use of SaaS for archiving — at least to meet their message archiving needs.¹ A further 17% had plans to implement it over the next year (see Figure 1). Cloud archiving providers offer transparent, easy-to-predict pricing models, often based on an easily estimated variable — such as an inbox, a user ID, or a social media account. Contrast this to on-premises or vendor-managed services that price based on a mixture of factors including the volume of archived content. Predictability of subscription costs, ease of deployment, and the ability to shift budget from capital expenditure (capex) to operational expenditure (opex) make cloud alternatives for archiving increasingly attractive.

FIGURE 1 The Majority Of Firms Surveyed Are Implementing Or Expanding Their Message Archiving Offering

“What are your firm’s plans to adopt the following ‘as-a-service’ security offerings/approaches?”
(Message archiving)



Base: 1,048 global client security technology decision-makers

Note: “Don’t know” responses are not shown.

Source: Forrester’s Global Business Technographics® Security Survey, 2016

Secure Capture Of Customer Communication Drives Archiving In Regulated Businesses

In recent years, cloud providers have invested in the core life cycle, supervision, eDiscovery, and search capabilities that regulated industries with a heavy compliance burden demand. Email, message, mobile, and social media data, in particular, are being archived in large volumes so that firms can demonstrate appropriate review and retention policies for customer and internal communications. The core capabilities of cloud-based archiving providers are:

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- › **Integration with broad set of communication and content sources.** Email and message archiving still dominate requirements for this market. Regulated industries also frequently require connectors for social media, voice communications, and mobile messaging. Many cloud archiving vendors are in the early stages of supporting document source systems, such as SharePoint, collaboration and file-sharing applications, network drives, or enterprise content management (ECM) systems.
- › **Life-cycle management to execute on retention and disposal policies.** A fundamental capability of archiving is the execution of corporate retention policies. Archiving platforms may support simple date-driven policies like “automatically delete one year after item creation,” or they may allow the implementation of more complex, event-driven rules, such as “delete items seven years after a project has been closed, after authorized user sign-off.”
- › **Legal holds to preserve items with relevance to litigation or investigations.** Archived items may be subject to preservation orders during legal disputes, audits, or other investigations. Legal hold capabilities allow authorized users to preserve potentially relevant items and prevent any scheduled deletion policy from wiping them from the system. Leading vendors support a range of hold techniques — by users, keywords, date ranges, saved search results, or other criteria.
- › **Scalability to meet the needs of large enterprises.** Cloud archiving releases technology managers from the burden of never-ending storage management within their own data centers. Large enterprises with thousands of employees subject to regulations will need to archive volumes well into the terabyte, if not the petabyte, range. Cloud archiving services provide a predictable, cost-effective model for information capture and management.
- › **Elastic, modern, cloud-native services.** Technology managers should be wary of “cloudwashing” when assessing archive providers. Cloud computing covers a very broad range of externally hosted compute, platform, and application services. Managed hosting may provide cost-reduction benefits or support mature, familiar technologies architected for the on-premises world, but it won’t provide the flexible, self-service capabilities of vendors using public or private cloud infrastructures.²

Tech managers should be wary of “cloudwashing” when assessing archive providers. Cloud computing covers a very broad range of externally hosted services.

Analytics Allows Archives To Become Sources Of Insights

Innovative vendors are augmenting the essential compliance capabilities with analytics, advanced search, and machine learning to support increasingly sophisticated use cases. These include:

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- › **eDiscovery.** Basic search and legal holds are table stakes in the cloud-based archiving market, but many vendors are now investing in lightweight case management tools for complex discovery requirements. Analytics and machine learning allow authorized users to tag, code, and review large volumes of archived items as part of an investigation.
- › **Supervision and surveillance.** Banks, investment firms, and some other regulated industries such as life sciences have regulations that prohibit particular types of promises or claims in customer communication. While nearly all cloud archiving providers have basic keyword or phrase supervision capabilities for email, many vendors are extending this capability to other item types such as mobile messaging, social media, and documents. Escalation queues for inspection of possible violations (such as using language to assure a guaranteed return on a stock) can be established for specific lines of business or types of violations.
- › **Trade reconstruction.** Cloud archiving providers with deep focus on financial services have also invested in the search, analysis, and case management capabilities to track trading transactions across communication channels in order to determine any irregularities or illegal activities. Advanced capabilities include matching email, instant messages, and even archived phone conversations to a particular transaction to understand how a deal was done.
- › **Data visualization.** As archiving vendors mature their eDiscovery capabilities, innovation in data visualization allows legal or compliance users to navigate large quantities of archived information using heat maps, interactive charts, calendar widgets, etc. These navigation tools let nontechnical users make sense of hundreds — if not thousands — of messages or documents relatively quickly by presenting the data in patterns or clusters, rather than raw result sets.

Information Archiving Cloud Providers Evaluation Overview

To assess the state of the cloud-based information archiving market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of 13 top vendors in the market: Actiance, Barracuda, Bloomberg, Erado, Global Relay, HPE, Microsoft, Mimecast, Proofpoint, Smarsh, Sonian, Veritas, and Viewpointe.

Evaluation Criteria: Current Offering, Strategy, And Market Presence

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 27 criteria, which we grouped into three high-level buckets:

- › **Current offering.** We assessed the technologies based on the breadth of the tool set, with particular emphasis on usability, as well as security, eDiscovery, and supervision capabilities. We also surveyed reference customers to gain firsthand knowledge of the strength of the vendors' product offerings as well as their professional, support, and education services.

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- › **Strategy.** Cloud-based information archiving vendors must show coherent strategies to help their customers capture, manage, analyze, and ultimately dispose of their content and communication. We assessed vendors on their technology vision as well as their go-to-market and professional services strategies.
- › **Market presence.** We evaluated each vendor based on its current customer base, the size of its cloud archiving revenue, and its geographic presence, partnerships, and vertical focus. Vendors have a minimum of \$10 million in archiving revenue or a minimum of 300 enterprise customers (defined as firms with more than \$1 billion in annual revenue).

Forrester's Information Archiving Cloud Providers Evaluation Assessed 13 Vendors

Each of the 13 evaluated vendors demonstrated core capabilities in the areas of overall archive and repository services, usability, security, and support for compliance and eDiscovery. Each vendor included in this evaluation (see Figure 2):

- › **Provides robust archiving repository services.** Vendors offer repository services in a hosted public or private cloud instance, with core capabilities such as life-cycle management, search, reporting, and integration with a range of line-of-business applications.
- › **Understands the needs of nontechnical users.** Archive services are no longer accessed only by technical managers but now act as systems of record that day-to-day information workers must use to retrieve historical business records and communication. Legal and compliance officers also rely on archive systems for their investigations and monitoring. User-friendly web, mobile, or email client access is a key feature. Leading vendors also provide the workflow, case, or tracking tools to support ongoing or repeat discovery requirements.
- › **Invests in security capabilities to protect the content it manages.** While encryption of archived content has become table stakes, vendors are also ensuring that content is protected by enabling secure, nonrecoverable deletion or destruction of obsolete items. Vendors also offer flexible user and group management and understand the data sovereignty needs of global customers.
- › **Delivers the supervision and discovery capabilities needed by regulated industries.** Supervision and surveillance of internal, incoming, or outgoing communications is essential to banking and other financial services firms to protect against rogue traders or inappropriate

Innovative vendors are augmenting essential compliance capabilities with analytics, advanced search, and machine learning to support sophisticated use cases.

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dealmaking. Specific industry regulations in banking or life sciences also require options for immutable storage. Options to set policies that restrict the distribution of personally identifiable information (PII) and other forms of confidential content are also essential capabilities.

FIGURE 2 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product
Actiance	Alcatraz
Barracuda	Barracuda Cloud Archiving Service
Bloomberg	Bloomberg Vault
Erado	Erado Compliance Platform
Global Relay	Global Relay Archive
Hewlett Packard Enterprise (HPE)	HPE Digital Safe Suite
Microsoft	Microsoft Information Archiving
Mimecast	Mimecast Archiving
Proofpoint	Proofpoint Enterprise Archive
Smash	The Archiving Platform
Sonian	View
Veritas	Enterprise Vault.cloud
Viewpointe	OnPointe

Vendor selection criteria

- Provides robust archiving repository services
- Understands the needs of nontechnical users
- Invests in security capabilities to protect the content it manages
- Delivers the supervision and discovery capabilities needed by regulated industries
- Has a minimum of \$10 million in archiving revenue or a minimum of 300 enterprise customers (defined as firms with more than \$1 billion in revenue)

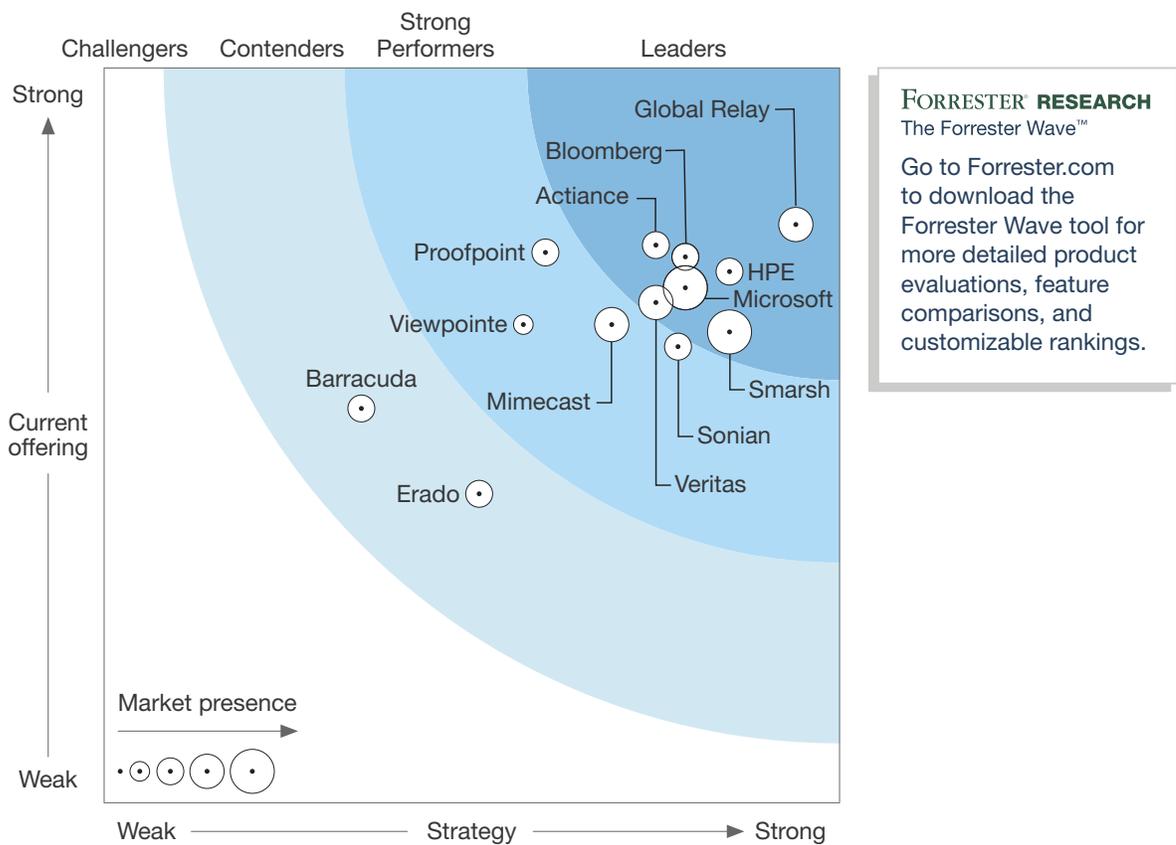
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Vendor Profiles

This evaluation of the information archiving cloud providers market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 3). Technology and compliance managers should also be aware of other archiving vendors that have an alternative approach and assess them for potential fit.

FIGURE 3 Forrester Wave™: Information Archiving Cloud Providers, Q4 '16



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FIGURE 3 Forrester Wave™: Information Archiving Cloud Providers, Q4 '16 (Cont.)

	Forrester's weighting	Actiance	Barracuda	Bloomberg	Erado	Global Relay	HPE	Microsoft	Mimecast	Proofpoint	Smash	Sonian	Veritas	Viewpointe
Current offering	50%	3.79	2.68	3.71	2.10	3.93	3.61	3.50	3.25	3.74	3.20	3.10	3.40	3.25
Architecture and repository services	25%	4.35	3.35	3.85	2.50	4.40	3.35	3.90	4.50	4.05	4.20	3.90	4.00	3.10
Usability	25%	1.90	2.05	3.80	1.00	3.50	2.00	3.10	2.60	3.50	2.50	1.00	2.50	3.40
Security capabilities	25%	4.40	4.30	2.40	3.10	3.20	4.70	4.00	3.70	4.10	3.20	3.70	4.00	3.20
Compliance and eDiscovery	25%	4.50	1.00	4.80	1.80	4.60	4.40	3.00	2.20	3.30	2.90	3.80	3.10	3.30
Strategy	50%	3.75	1.75	3.95	2.55	4.70	4.25	3.95	3.45	3.00	4.25	3.90	3.75	2.85
Go-to-market strategy	25%	3.00	1.00	5.00	3.00	5.00	5.00	5.00	3.00	3.00	5.00	3.00	3.00	3.00
Professional services strategy	30%	4.00	2.00	3.00	3.00	4.00	4.00	3.00	3.00	3.00	4.00	3.00	4.00	4.00
Technology strategy	45%	4.00	2.00	4.00	2.00	5.00	4.00	4.00	4.00	3.00	4.00	5.00	4.00	2.00
Market presence	0%	2.30	2.40	2.40	2.80	3.50	2.40	4.60	3.40	3.00	4.10	3.20	3.50	1.10
Customer base	20%	1.00	1.00	3.00	4.00	5.00	3.00	4.00	4.00	2.00	5.00	5.00	5.00	0.00
Revenue and pricing	40%	2.25	3.00	3.50	2.50	3.25	3.50	4.50	3.50	3.50	2.75	2.50	3.25	1.75
Partners	40%	3.00	2.50	1.00	2.50	3.00	1.00	5.00	3.00	3.00	5.00	3.00	3.00	1.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Leaders: Global Relay, HPE, Actiance, Microsoft, Smarsh, Bloomberg, And Veritas

- › **Global Relay delivers a highly scalable archive to meet the needs of large enterprises.** Global Relay continues to invest in its platform, including a major modernization effort in recent years. Taking advantage of innovations in NoSQL databases and big data technologies, Global Relay serves regulated industries with high volumes of archived information. Data centers are located in Canada, a jurisdiction with strong privacy laws, with European data centers on its road map. Connectors support a broad range of email, messaging, social media, and enterprise collaboration tools.

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Global Relay provides rich metadata capabilities, automatically categorizing incoming content across diverse sources or domains (for example, acquired companies operating their own email systems). Rich analytic dashboards help authorized users understand and navigate large volumes of information as part of discovery or investigations. eDiscovery capabilities include case management, allowing legal teams to hold relevant information in sharable folder structures (based on queries) that reflect the discovery activity. For example, a different case structure can be used for a human resource complaint versus a contract dispute. Customers report particularly high satisfaction levels with Global Relay's customer service and responsiveness.

- › **HPE at last demonstrates innovation in its archive portfolio.** HPE's established archive product, Digital Safe, continues to be a workhorse. Digital Safe is a hosted, vendor-managed service. Key capabilities include retention and disposition management, legal holds, metadata enrichment of archived items, scalability, security, and integrations with a broad range of communication, collaboration, and messaging systems. Additional modules from HPE provide extended capabilities for surveillance, advanced investigative analytics, early case assessment, and technology-assisted review.

Support services from HPE manage the technical environment, reducing the administrative burden on customers. Digital Safe customers report satisfaction with many core archiving capabilities but have expressed concern over solution costs and the slow pace of product enhancements. In mid-2016, HPE announced its next-generation information governance platform, Verity, which is architected to take advantage of elastic, modern cloud services, with archiving as its first shipping application. Digital Safe benefits from some of these new architectural elements, such as a common application framework, including migration tools.

- › **Actiance harnesses domain expertise to address the cloud archiving market directly.** After years of successful social media capture partnerships with other archiving providers, Actiance launched its own Alcatraz archiving platform in early 2014. While a relatively new offering, key partners, such as IBM, are driving market interest. Alcatraz provides a rich set of connectors to many communication channels, including email, messaging, collaboration sites, social media, and Office 365.

Businesses with compliance requirements can analyze communications by mapping different user identities from various source systems, helping follow a conversation even across channels. Investments into analytics allow clients to use the archive platform for supervision and investigations, as well as to discover patterns of communication and insights into user behavior. Customers report overall satisfaction with current archiving capabilities but seek improved capabilities to archive documents and PST files from network drives.

- › **Microsoft takes an unconventional approach with its "in-place" archive for Office 365.** Unlike other evaluated vendors, Microsoft's cloud archiving services do not move or copy files or messages to another repository system. As both the source application and the archiving system, emails, messages, calendars, or files stored in Exchange or SharePoint Online remain accessible

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to users, without any duplication or stubbing. A central portal for governance or compliance roles allows simple or complex queries to be run for eDiscovery or investigations. Legal holds can be placed on relevant items to override default disposition policies.

Third-party partners, such as Globanet, provide connectors to allow external social media or messaging systems to be archived into Office 365. While specific features, such as supervision or event-driven retention, may be less advanced compared with other evaluated vendors, the one-stop shop approach will appeal to firms that are streamlining their vendor portfolios and don't require extensive eDiscovery on non-Microsoft data.

- › **Smarsh continues to evolve to support large enterprises and global businesses.** Smarsh continues to show innovation in its focus on social media, actively building a connector portfolio to keep up with emerging content sources. Smarsh anticipates the new channels of communication used in its customer base and focuses on these integrations. For example, new connectors for Slack and Symphony were launched in 2016. Smarsh uses native APIs for each connector, archiving information in its native form; it does not convert incoming content into an email standard format as many other evaluated products do.

Smarsh supplements its supervision product capabilities with a professional services package to help smaller firms perform their supervision activities. Innovative supervision is a focus for Smarsh, with ongoing investment in analytics to go beyond traditional keyword or lexicon approaches. Customers report high satisfaction levels with search and tagging capabilities. Responsiveness and customer support services, however, are areas of notable dissatisfaction.

- › **Bloomberg uses big data technologies to power its archiving platform.** Well-known in financial services for its market intelligence, messaging, and terminals, Bloomberg has made significant investments in archiving over recent years. Investment and banking firms that need to do complex trade reconstruction — combining structured and unstructured data, including voice communications — can benefit from the Bloomberg Vault's extensive surveillance/supervision capabilities. Recent acquisitions, including social media compliance provider Netbox Blue, demonstrate Bloomberg's commitment to delivering a comprehensive archiving platform that captures the range of content, messaging, and social media sources used by regulated businesses.

A modern architecture, leveraging many cutting-edge open source tools including Apache Spark, Storm, and Hadoop, will appeal to firms with large archive volumes and a desire to leverage analytics for investigations, discovery, and supervision. Bloomberg expects to launch options for a hybrid archive in late 2016 to accommodate local item storage to meet data sovereignty needs.

- › **Veritas balances user productivity tools with compliance capabilities.** The Enterprise Vault. cloud solution provides a user-friendly “personal archive” capability for information workers to easily access their historical email. Users can access this information via a web interface or through their email inbox with an Outlook plug-in. Retention rules can be simple date-driven policies (such

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as “delete one year after receipt”) or based on metadata with the archive’s “managed tag” feature. For example, items tagged as “customer communication” can be kept for five years, even if the default rule is one year.

In addition to Microsoft Office 365 and Exchange messages, Enterprise Vault.cloud can archive documents from sources such as on-premises SharePoint sites or cloud-based Box. Additional modules extend the core archiving capabilities, such as the Veritas AdvisorMail product for supervision capabilities, and document review is supported via Veritas eDiscovery (formerly Clearwell). Customers report good satisfaction levels across key archiving capabilities but report some concern over timeliness of issue resolution.

Strong Performers: Sonian, Proofpoint, Mimecast, and Viewpointe

- › **Sonian seeks to redefine information archiving by leveraging public cloud services.** Founded in 2007, Sonian chose to use public cloud services to tackle archiving in the era of big data and compliance obligations across new social and messaging channels. Amazon’s cloud allows Sonian to take advantage of highly elastic, scalable services. Sonian envisions its archive as a business insights platform, using analytics to extract trends and patterns from archived information. ElasticSearch powers the search and discovery capabilities, and Sonian is a major project contributor. Sonian’s go-to-market strategy is cross-industry, with the majority of its revenue coming through partners and OEM relationships.

Customers are able to self-provision much of the service, making Sonian an attractive option for small and mid-sized businesses that don’t have dedicated technical or compliance manager roles. Currently email and messaging are supported as content sources, with archiving from network drives, SharePoint, or file shares on the road map. Customers report high satisfaction with search and ease of applying legal holds at an item level, though customers want more flexibility to apply holds at a case level.

- › **Proofpoint delivers archiving and compliance capabilities in the context of security.** Along with its SaaS Enterprise Archive solution, Proofpoint also offers a range of cybersecurity and threat detection services. Proofpoint has invested in archive connectors not only for email but also for collaboration and messaging content. File archiving is an area of road map investment, including SharePoint, Box, and OneDrive. Recent acquisitions, such as SocialWare to fast-track its social media governance capabilities and OrcaTec for technology-assisted review and data visualization, demonstrate Proofpoint’s focus on delivering end-to-end information governance capabilities.

Proofpoint has augmented the archiving platform with REST APIs for better integration with other enterprise applications, such as legal hold management or workflow tools. Supervision capabilities allow authorized users to monitor communication for policy violations, and Proofpoint allows firms to predefine approved content (for example, sales brochures or disclaimer statements) to reduce the volume of false-positive hits.

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› Mimecast delivers archiving and continuity services, focusing on the Microsoft stack.

Mimecast continues to benefit from the shift to cloud services for email, with strong year-over-year growth and customer retention. Customers with retention, eDiscovery, and business continuity requirements across multiple industries use Mimecast for email, file, and message archiving. Mimecast's cloud storage platform powers the archive, offering rich APIs to customers and partners. The archive has been architected for high availability, and search response times are written into the service-level agreement. Custom metadata is supported with the "Smart Tag" capability, enabling enhanced search, discovery, or sharing.

Granular retention rules can be created if different rules need to be applied to specific item types, groups, office locations, or other attributes. Legal holds can also be granular, applying to specific items or to batches of items resulting from a search. Regulated businesses can use supervision capabilities to assess incoming or outgoing communication, and authorized users can tag items for review. Administrative activities can be monitored as well; for example, broad searches across the archive are logged, with reasons for the search required. Customers report particular satisfaction with Mimecast's support services.

› Viewpointe focuses on regulated industries, with a managed-service cloud model. The OnPointe hosted archiving, eDiscovery, and supervision platform uses Viewpointe's own technologies as well as best-of-breed tools from partners IBM and ZL Technologies. With its track record in financial services, Viewpointe will appeal to regulated businesses seeking to outsource not just archiving storage and services but much of the technical administration of the system. OnPointe archives a broad set of information sources, including print stream, documents, and email, and supports application decommissioning use cases. User interfaces have an outdated look and feel relative to other evaluated vendors.

The vendor provides a range of professional services to integrate and implement the product, including subject matter expertise for guidance on governance, such as establishing retention policies. Currently the product is available only in US data centers. Customers report high satisfaction with OnPointe's search and its packaged integrations for enterprise applications. Customers are less satisfied with professional services, particularly training and documentation.

Contenders: Erado And Barracuda**› Erado targets small and midsized firms that must cope with compliance burdens.** Erado delivers archiving services optimized for content and communication from the web, including cloud-based email, messaging, social media, voice-over-IP (VoIP), and websites (including video sites such as YouTube or Vimeo). Erado focuses on regulated industries as well as the public sector. Erado is appropriate for companies with simple retention requirements — the archive has limited ability to set retention policies via metadata or policies other than dates. Supervision, however, can be tailored for specific communication channels, allowing unique keyword

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lexicons to be applied to different content sources. For example, reviewers can assess customer correspondence via a message platform with different supervision rules than communication done in email.

- › **Barracuda shifts its focus from on-premises appliances to cloud archive services.** Launched in late 2015, the Barracuda Cloud Archiving Service (BCAS) is packaged in simple, transparent per-user/per-month subscriptions, including a bundle specific to Microsoft Office 365 (for email, calendars, and messages). Currently, support for file/document archiving is limited. BCAS is delivered as multitenant in Barracuda-run data centers in the US, the UK, and Canada. Barracuda supports retention and disposition policies, legal holds, and complex searches for discovery purposes. End users can use an Outlook interface to access email or use native apps for iOS or Android. Mac and Windows desktop search of the archive is also supported. Enterprises with old PST files can use Barracuda's collection tool to ingest older email messages as part of a file share cleanup or migration program. Customers report overall satisfaction with core archiving capabilities but express concern over the pace of product innovation.

Other Noteworthy Vendors And Approaches

Some vendors that did not meet one or more of the inclusion criteria are still strong candidates for shortlist consideration when looking at cloud delivery models for archiving services. EA pros should also assess:

- › **Established on-premises vendors launching new cloud platforms.** Vendors such as OpenText have very recently launched cloud-native archiving platforms designed for cloud email applications. Technology managers desiring cloud services for archiving should investigate if their current providers have launched a cloud service or plan to do so as part of their short-term road map.
- › **Alternative architectures that include cloud services.** Vendors such as CommVault with its Simpana offering support cloud services such as Amazon Web Services, Microsoft Azure, Google, and others as storage locations as part of their archiving and backup offerings. Enterprises using on-premises archiving providers that want to offload storage to cloud services should understand if their current provider can use this type of cloud storage model.
- › **Private cloud or vendor- or partner-managed services.** Many on-premises archiving platforms, including IBM, Dell EMC's InfoArchive, and ZL Technologies Unified Archive, can be hosted by the vendor or its partner ecosystem. Customers may also deploy these technologies in their own private cloud infrastructure.

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Supplemental Material

Online Resource

The online version of Figure 3 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by September 30, 2016:

- › **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

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- › **Product demos.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- › **Customer reference surveys.** To validate product and vendor qualifications, Forrester also conducted reference surveys with three of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to <http://www.forrester.com/marketing/policies/forrester-wave-methodology.html>.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with our Integrity Policy. For more information, go to <http://www.forrester.com/marketing/policies/integrity-policy.html>.

Survey Methodology

Forrester's Global Business Technographics® Security Survey, 2016 was fielded from March to May, 2016. This online survey included 3,588 respondents in Australia, Brazil, Canada, China, France, Germany, India, New Zealand, the UK, and the US from companies with two or more employees.

Forrester's Business Technographics ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of business and technology products and services.

The Forrester Wave™: Information Archiving Cloud Providers, Q4 2016

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ResearchNow fielded this survey on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates.

Please note that the brand questions included in this survey should not be used to measure market share. The purpose of Forrester's Business Technographics brand questions is to show usage of a brand by a specific target audience at one point in time.

Endnotes

¹ Source: Forrester's Global Business Technographics Security Survey, 2016.

² We introduce a new set of definitions to describe cloud-based services — managed clouds and managed hosting — and how they relate to infrastructure-as-a-service (IaaS), platform-as-a-service (PaaS), and software-as-a-service (SaaS) services. For more information, please see the "[Cloud Service Provider Categories Are Shifting: Here's Your Guide](#)" Forrester report.

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