Gartner.

Magic Quadrant for Enterprise Information Archiving

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▼ VIEW SUMMARY

Enterprise information archiving offers organizations solutions for compliance and discovery, while reducing overall storage costs. To aid IT leaders, Gartner evaluates vendors offering products and services that provide archiving for email, social media, files and other content types.

Market Definition/Description

Enterprise information archiving (EIA) incorporates products and solutions for archiving user messaging content (such as email, IM, and public and business social media data) and other data types (such as files, enterprise file synchronization and sharing [EFFS] and Microsoft SharePoint documents, some structured data, and website content). A vast majority of market spend for EIA is for email retention. EIA products provide features such as data reduction across content types, retention management, content indexing and at least basic tools for e-discovery. A new use case supporting analytics of secondary data also is starting to appear. Due to the complexity associated with managing multiple data types within an archive, EIA may more broadly encompass capabilities such as federated archive repository management, and common policy management for migration, retention and discovery across multiple repositories.

EIA solutions traditionally were implemented by highly regulated environments, such as financial services and healthcare, but this is changing as organizations of all sizes and all industries are starting to retain and manage email and other unstructured data for compliance, risk, governance and cost optimization. The costs of an EIA implementation can vary due to number of users or amount of content being retained, but often range from $3 to $15 per user per month for SaaS offerings, and $20 to $60 per user for on-premises solutions for messaging content, with file content being charged on a capacity basis. The price also varies by the number of content sources archived and the management modules selected, such as enhanced e-discovery and supervision. Gartner is seeing a majority of organizations selecting SaaS for new or updated messaging data archiving implementations.

It is important to remember that Gartner's 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 and support customers is equally important, as is its ability to grow product and service revenue. A vendor that offers a strong, technically elegant product, but is unable or unwilling to invest in marketing and sales to generate revenue and growth, will find itself unable to invest sufficiently in future development. In addition, a vendor's ability to understand market dynamics and adjust product roadmaps accordingly (such as offering support for cloud archiving) is important in a mature market like EIA, and establishing leadership, vision and credibility will propel some vendors to the front of the pack.

Magic Quadrant

Figure 1. Magic Quadrant for Enterprise Information Archiving

EVALUATION CRITERIA DEFINITIONS

Ability to Execute

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

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

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

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

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

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

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

Completeness of Vision

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

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

CHALLENGERS | LEADERS

- Mimecast
- Proofpoint
- Veritas
- Hewlett Packard Enterprise
- Microsoft
- Smarsh
- Bloomberg
- Global Relay
- Commvault
- EMC

- Barracuda Networks
- ZL Technologies
- IBM
- GWAVA
- Google
- Actiance

NICHE PLAYERS | VISIONARIES

ABILITY TO EXECUTE →

COMPLETENESS OF VISION →

As of October 2015

Source: Gartner (October 2015)

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.

Vendor Strengths and Cautions

Actiance

Actiance, based in Redwood City, California, provides EIA support for IM, public and business social data, and email. Its Vantage product implementations are split between on-premises and SaaS, and support includes Microsoft Office 365, Lync/Skype for Business IM and voice, and SharePoint; IBM Connections and Sametime; Jive; Salesforce Chatter; Bloomberg; Thomson Reuters; and other enterprise social applications. Offered as a SaaS offering, its Socialite product manages capture and compliance for Facebook, LinkedIn, Twitter, Google+ and YouTube. Alcatraz, an on-premises or SaaS solution, brings all sources and conversations together into a common repository for all Actiance-captured data, including Exchange and Domino email archiving. Search performance is backed by a minimum 10-second SLA. Comprehensive analytics capabilities recently have been added to the suite. Actiance products are mainly sold direct or through large partners, such as IBM and EMC, with two-thirds of its revenue generated from the financial services sector. Actiance's largest email archiving customer has 10,000 mailboxes. The vendor plans to add Alcatraz Surveillance to its suite this year, enhancing comprehensive surveillance capabilities across all content in the Alcatraz store repository. Further planned updates will be "capture on demand" for instant capture of selected data sources, and upgrades to the Socialite and Vantage user interfaces.

Strengths

- Integrated tools provide the ability to aggregate the collection of user identities across all sources, and store the data collectively in the Alcatraz repository. This enables search, discovery and supervision across all content types.
- Actiance is widely adopted in the financial services market for collection of IM and persistent chat data.
- Actiance provides a comprehensive set of compliance capabilities. These include data loss protection (DLP), ethical boundaries, classification, cross-content discovery and a full surveillance feature set.

Cautions

- Actiance is facing increased competition in its legacy business for IM and social media compliance capture as legacy email archiving vendors integrate their own social and business media data capture products.
- Email archiving is still relatively new for Actiance, with a limited number of customers that have adopted to date.
- The user interfaces for Vantage and Socialite are dated, and administrative users face challenges working in the product.

Barracuda Networks

Based in Campbell, California, Barracuda Networks has progressed from its 2014 C2C acquisition, with initial integration of its portfolio. The PST Enterprise solution has been fully integrated with Barracuda Message Archiver. Legacy C2C Systems ArchiveOne is now being sold through the channel. Barracuda supports Exchange, Office 365, Domino and Gmail, files, and IM. In addition to the Message Archiver physical appliance, Barracuda has introduced a virtual appliance for Message Archiver that supports VMware, Hyper-V and Xen hypervisors, as well as Azure, vCloud Air, and Amazon Web Services (AWS) public clouds. The bulk of Barracuda customers use the products for

email retention, with few implementations as of yet for files and IM archiving. Message Archiver is sold exclusively through the reseller channel; the largest implementation is 24,000 mailboxes. Barracuda offers Instant Replacement, which provides customers with next-day replacement of defective hardware and a new replacement appliance every four years. Barracuda plans to release a SaaS solution in the near future, as well as simplified general information management tools for midmarket customers.

Strengths

- The Barracuda Message Archiver is inexpensive, simple to install and easy to manage, garnering positive comments from customers.
- ArchiveOne offers strong PST management capabilities, including policy application for in-place management of PSTs or ingestion into the archive.
- Barracuda Instant Replacement program provides an effective and efficient way to quickly replace defective equipment, and a simplified upgrade path — a new appliance is automatically provided after four years.

Cautions

- Barracuda still has no full SaaS solution in general availability; something that has been on its roadmap for an extended period.
- Barracuda Message Archiver and ArchiveOne, overall, are still not fully integrated, and users should seek a full understanding of Barracuda's ongoing roadmap to ensure archiving needs are met.
- File archiving is still very basic, and files and other content are not included when doing a search for discovery purposes.

Bloomberg

Bloomberg, headquartered in New York City, positions Bloomberg Vault as a compliance, surveillance, trade reconstruction and risk management solution. Vault supports Exchange and Domino email, IM, social media, SharePoint, Box, as well as Windows and Unix/Linux file shares. Bloomberg is heavily invested in financial services, and provides email supervision. In addition, the company provides solutions to address trade reconstruction, correlating structured, unstructured and voice data, driving compliance for financial services regulations such as the U.S. Dodd-Frank Act and the EU Markets in Financial Instruments Directive (MiFID) 2. To provide geographical data sovereignty, Bloomberg plans to introduce a hybrid deployment model for local data storage within the client's infrastructure. Vault is sold by a specialist overlay group, as well as the wider company sales force. Bloomberg's largest implementation of email archiving supports 12,000 mailboxes. Bloomberg Vault File Analytics extends compliance and analytics into the customer's unstructured dataset, which offers policy-based retention. The vendor's roadmap also includes enhanced supervision and trade reconstruction capabilities; updated user workflows; and more robust file analysis features, including improved reporting and visualization capabilities.

Strengths

- The Bloomberg Vault team has extensive experience and understanding of financial services compliance data capture requirements. This is reflected in a rich feature set for this industry.
- Bloomberg is a leader in capturing data for Dodd-Frank and MiFID2 regulation adherence.
- Bloomberg Vault is a scalable and reliable archiving solution, as noted by customers.

Cautions

- The Bloomberg Vault offering continues to be overshadowed by Bloomberg as a financial news and messaging company, creating visibility and clarity issues for the Vault platform.
- The Vault UI is still a work in progress as the Web interface and some background administration tasks may be nonintuitive.
- The search capabilities are not always intuitive, and resulting reports can be difficult to manage.

Commvault

Commvault, a publicly traded firm based in Oceanport, New Jersey, provides archiving through its Commvault solutions portfolio, which is most widely used for backup. Commvault archives Exchange, Office 365 and Domino email; Windows, Unix, Linux and Mac file shares; and SharePoint. Commvault partners for social media and IM content. One copy of the data is captured at the same time through Commvault OnePass, for backup and archival use cases. Along with compliance, storage optimization is a key use case. All data is stored in ContentStore, a single virtual repository of data that can be centrally managed and searched. Content-based retention rules can be applied through the Reference Copy feature. Commvault has good vertical support including, and t continues to build out its healthcare support, including plans to deliver vendor-neutral archive (VNA) support in the future. Commvault is currently an on-premises solution (although it is widely used by managed service providers [MSPs]), and the vendor is delivering a branded SaaS offering as part of its roadmap. Commvault's largest implementation of email archiving is a federal agency with hundreds of thousands of mailboxes, and its largest file archiving customer is currently licensed for 24PB.

Strengths

- Commvault is a well-integrated platform for multiple use cases including archiving and backup.
- Commvault Simpana is well suited for, and has high penetration in, healthcare.
- Commvault provides a scalable solution for file archiving in which customers see a marked improvement in storage efficiencies.

Cautions

- A general lack of awareness of Commvault as an archiving solution, coupled with integrated code that caters to backup technology first, creates adoption concerns for Commvault customers.
- Non-IT personnel find Commvault's administration and discovery interface difficult to use, often requiring additional training.
- Some components of the end-user experience — including, user-directed archiving, ability to

manipulate the archived data and mobile access — are areas that need to be improved.

EMC

SourceOne is the main product in Hopkinton, Massachusetts-based EMC's EIA portfolio. SourceOne supports archive for email (Exchange, Office 365, Domino and other messaging applications, via SMTP; Windows, Unix, CIFS and NFS on network-attached storage [NAS] devices) and SharePoint. E-discovery is provided through SourceOne Discovery Manager. EMC InfoArchive is a solution for storing many kinds of archived data, including SourceOne-supplied data and structured data for application retirement. Its Cloud Tiering Appliance and DiskXtender work in conjunction with SourceOne for File Systems for multitier file archive and migration. EMC leverages a combination of internal sales resources (namely through its Data Protection and Availability Division) and broad reseller channel for go-to-market. SourceOne is often jointly sold with EMC's data protection products, such as bundled with Data Domain. EMC also offers SourceOne as a service with a one-way encryption key held by the customer, which requires a virtual machine at the customer's site. Data for the hosted solution is captured via a journaling feed or SMTP gateway, with user access through Outlook Web App (OWA) or a Web interface. EMC's largest implementation supports 300,000 mailboxes. Expect EMC to continue to enhance SourceOne as an integrated data protection and archiving solution, cloud and hybrid offerings, and analytics capabilities.

Strengths

- SourceOne provides archive support for a broad range of data sources; with InfoArchive providing a capable centralized repository for data retention, retrieval and analytics use cases.
- Search performance and scalability makes SourceOne a viable option for large enterprises.
- New use cases, including analytics and in-place management of data, highlight EMC's awareness of current and future market needs.

Cautions

- The combination of the myriad of EMC archiving products — SourceOne, InfoArchive, DiskXtender, Cloud Tiering Appliance — in conjunction with administration functions and end-user offerings can be difficult to integrate and manage.
- SourceOne Email Supervisor functionality lags competitors for supervision/surveillance in the financial services industry.
- The company's future direction and roadmap for overall archiving strategy lacks clarity and is cited as a general concern by customers.

Global Relay

Global Relay, headquartered in Vancouver, British Columbia, Canada, along with worldwide offices, provides a compliance and information-governance-focused SaaS-based solution targeted at, but not limited to, the financial services industry. Global Relay's portfolio delivers archiving for Exchange, Office 365, Domino and Gmail; other messaging applications via SMTP; Bloomberg, Thomson Reuters, Jive, Ice, Salesforce Chatter, Yammer, Lync and other IM platforms; as well as business and social media, and mobile content. The vendor has invested heavily in compliance supervision and discovery, which are provided natively without separate modules. The U.S. Financial Industry Regulatory Authority's (FINRA's) Compliance Resource Provider Program lists Global Relay as a named messaging archiving vendor. Global Relay is making inroads into other verticals, including healthcare, public sector and telecommunications. Global Relay's largest production customer archives for 80,000 users. The Global Relay solution is offered as a secure portal architecture, with role-based access controls (RBACs), containing a suite of applications to enhance communications and collaboration among users, putting an emphasis on the active archive use cases — such as advanced legal holds, case management and self-service downloads. Looking ahead, Global Relay plans further enhancements to the end-user workspace portal and to continue building out enhanced use cases for information governance.

Strengths

- Global Relay has a deep knowledge of, and provides a rich feature set for, the financial services industry.
- Global Relay provides a rich breadth of search capabilities, with customer-confirmed performance.
- The company has a focus on not only archiving and retention features, but as a communications platform, including native IM capabilities, providing a unique offering for financial services firms.

Cautions

- Although it supports complex capabilities, the discovery process is not always as automated as some users require, and may require assistance from Global Relay staff.
- Extraction of data from Global Relay, including at contract termination, can come at a substantial cost, and organizations should negotiate extraction fees at the beginning of the contract to eliminate surprises.
- End-user access continues to be a work-in-progress, such as the Web link access inside of Outlook and lack of folder structure support in the archive.

Google

Google, headquartered in Mountain View, California, offers Google Vault for the archiving of Google content. Google Vault archives content from Google Gmail, Google Drive and Google Hangouts (Talk), and SMS archiving through Google Voice also is supported. Vault is sold on a per-user basis charge, and with the Google Apps for Work Unlimited package, customers effectively have unlimited data storage. Google Apps Vault provides e-discovery capabilities in the same interface. Retention policies can be set based on default categories like organization, sent data or search terms, or through custom policies. Google recently announced support for archiving and retention support — Google Drive. Higher education is a common vertical market for Google Vault. Vault is well-suited for international environments; it can handle more than 50 languages, including double and triple byte characters. The largest deployment of Google Apps Vault has more than 389,000 Gmail mailboxes. Moving forward, Google plans to offer cloud-based email continuity, including end-user access to their archived data.

Strengths

- Google has demonstrated the ability to support very high-volume environments for Gmail and Drive archiving.
- Tight integration with Gmail and overall product performance is well rated by customers.
- Google Vault has good price-to-value; for example, areas like e-discovery and retention management are included in the base price.

Cautions

- Google Vault only supports archiving and retention of content shared through, or saved in, Google services.
- Google's customer management, including areas such as training and support, needs to be improved.
- E-discovery in Google Vault lacks the ability to tag, markup or redact data.

GWAVA

GWAVA, a Montreal, Canada-based company, markets Retain as a unified archiving suite primarily focused on Microsoft Exchange and Office 365, but also has comprehensive support for Gmail and Novell GroupWise. In addition, Lync/Skype for Business, AOL, Yahoo messaging, Google Chat, Yammer, Facebook, Twittter, LinkedIn and Web content are also supported. GWAVA has a strong partner channel, with 70% of overall sales through value-added resellers (VARs). Additionally, GWAVA is continuing its focus on its BlackBerry OEM partnership, in which Retain is rebranded and sold by BlackBerry as the BlackBerry Audit and Archiving Service. In addition, iOS and Android SMS and text messaging data is collected through partnerships. Additional offerings include content filtering and URL blocking. Retain Insights, introduced in 2014, is the underlying discovery technology that allows Retain to search and take action on outside data sources and to conduct e-discovery activities across any connected dataset. That addition is receiving high marks from customers. Retain is offered as an on-premises or hybrid solution, with the largest customer archiving 68,000 mailboxes. Future roadmap items include additional Retain Insights connectors providing analytics capabilities, a Retain mobile app and improved SaaS capabilities for GWAVA cloud partners.

Strengths

- Customers repeatedly mention their happiness with the pricing structure and overall sales and support experience.
- GWAVA's ability to ingest almost any messaging data type allows for a centralized messaging data compliance experience.
- Retain Insights provides an API for third parties to insert messaging data into the archive, and also allows for easy search and e-discovery from within Retain across multiple outside data sources not held within the archive repository.

Cautions

- End-user access to email is not as user friendly as some competitors' products.
- Retain-exported reports are limited to .pst and .pdf formats today.
- GWAVA does not offer file archiving as an option.

Hewlett Packard Enterprise

Hewlett Packard Enterprise (HPE), based in Palo Alto, California, provides HPE Consolidated Archive (HPCA) for on-premises archiving, and HPE Digital Safe as a SaaS offering. The portfolio supports a wide range of archiving use cases, including support for Exchange, Office 365, Domino, Gmail, heterogeneous file systems, SharePoint, IM, voice, video and social media content. In addition, HPE provides structured data archiving through HPE Structured Data Manager. HPE sells products through a large direct sales force and VAR channel, with 80% of revenue generated by direct sales. The company has introduced a more-industry-specific marketing and sales initiative targeting key segments — financial services, government, legal, pharma, and energy. The archiving products are being engineered and marketed in conjunction with HPE's Big Data and InfoGov initiatives. In addition, there has been an emphasis on creating data centers globally to support cloud archiving and address data residency requirements internationally. HPE products are priced on a per-user basis for on-premises archiving, and on a subscription basis (price per user, per month) for the cloud. The largest production customer has 120,000 mailboxes archived. On the vendor's roadmap are plans to provide enhanced data analytics (including data in-place), improved supervision and an improved data access experience.

Strengths

- HPE archiving offerings are used in very challenging and highly regulated environments for governance and compliance.
- It provides solid supervision capabilities for the financial services industry.
- The workflow of capturing data, ingesting into the archive, and applying policies is robust and is enhanced by strong role-based capabilities and lexicons.

Cautions

- The HPE product offering can be expensive, and the on-premises HPCA product may require a heavy technology footprint.
- HP has been known to charge heavy extraction fees for customers that leave its environment.
- The mobile access for DSmail, the user mail interface into the HPE archive, needs to be improved for end-user experience.

IBM

IBM, based in Armonk, New York, offers IBM Content Collector for archiving of Microsoft Exchange, Lotus Domino and SMTP email, files, Microsoft SharePoint, SAP and IBM Connections social content. IBM also offers Web Content Manager for archiving of Web content. In addition, IBM partners with Actiance for IM and other social media content archiving, such as LinkedIn and Facebook. IBM Content Collector is largely an on-premises offering, although Content Navigator is available in the

IBM SoftLayer Cloud. Approximately, 45% of IBM's archiving customers are using Content Collector for archiving of Lotus Notes email, because IBM is effectively working within their customer base. IBM also resells CA Email Control for email supervision and DLP, which is integrated with Content Collector. IBM's largest email archiving customer utilizes Content Collector for 50,000 mailboxes. Moving forward, IBM has plans to archive audio/video, as well as enterprise file sync and share files, because the company recently partnered with Box.

Strengths

- IBM has good archiving for file shares with capabilities for user-directed archiving and support for a wide array of environments, including Apple.
- IBM places an emphasis on retention management, an area that enterprises are increasingly focused on, and provides a variety of options that include advanced records management.
- IBM provides good product support for areas that are related to unstructured content archiving, such as enterprise content management and e-discovery.

Cautions

- Integration and usability for such areas as search interface, security and active directory can be difficult to implement and manage.
- Product pricing for Content Collector is expensive, compared to the industry in general.
- IBM's visibility for product futures and roadmaps is limited.

Microsoft

Microsoft, based in Redmond, Washington, offers Exchange Archiving through Exchange 2013, 2016, and Exchange Archiving Online through Office 365 for archiving of Microsoft Exchange email, Microsoft File Shares, Microsoft SharePoint, as well as Lync/Skype for Business for on-premises or cloud-based deployments respectively. Microsoft also has partners for the archive capture of third-party IM, public and business social, EFFS, financial services messaging platforms and SMS/text messaging. Microsoft is differentiated through its ability to manage content in place, as opposed to journaling, and can apply legal or in-place holds for retention management. Microsoft Compliance Center is used for e-discovery search across Microsoft Exchange, File Share and SharePoint content, and the recently acquired Equivio technology is being offered for early case assessment (ECA). Office 365 maintains four copies of data to protect against data loss and to provide recovery. Microsoft tracks customers that use retention based on whether the tenant has archiving enabled in Office 365. There are millions of mailboxes archived, with many customers of more than 10,000 users. Recently, Microsoft rolled out full U.S. Securities and Exchange Commission (SEC) rule 17a-4 compliance. Microsoft's roadmap includes additional enhancements to supervision, indexing, search and ECA.

Strengths

- The archive experience for the end user is familiar because it is fully integrated as part of the Microsoft Outlook client.
- Microsoft provides significant cost savings included in the Office 365 licensing plans.
- For clients using Office 365 that do not have high-volume litigation and intensive e-discovery needs, Microsoft archiving is a natural fit.

Cautions

- E-discovery capabilities including search, case management and early case assessment are still works in progress.
- Users cannot access the archive mailbox data when disconnected.
- Policies, such as legal hold, cannot be applied to files in place in the file shares, but instead, they need to be migrated into SharePoint, OneDrive or Azure.

Mimecast

Mimecast, based in London, U.K., provides the SaaS-based Unified Email Management Platform with a focus on Microsoft Exchange/Office 365 Exchange Online-based archiving. In 2015, Mimecast made noticeable headway into the North America market. Mimecast supports archiving of Microsoft Exchange/Exchange Online, Lotus Domino, Google Gmail, Windows, Unix and Linux file shares, as well as Microsoft Lync/Skype for Business IM. Social media content is supported through partners. Mimecast supports standard e-discovery functionality of search and legal hold of content in the archive, and does not charge separately for e-discovery features. The vendor offers email continuity services, providing failover capabilities with the ability to approximate the look/feel and folder structure of Outlook if Office 365 is down. Mimecast sales are primarily through VARs. Looking ahead, Mimecast is planning on offering compliance supervision capabilities, as well as hybrid cloud support. Mimecast's largest customer archives 43,500 active users with more than 290,000 mailboxes.

Strengths

- Mimecast offers a complete portfolio for email that includes archiving, security, continuity and spam filtering.
- The vendor's technical expertise and rapid support response is cited by customers as a strength.
- Mimecast search and discovery performance, as well as breadth of options, combined with ease of use, provide a strong administrative and compliance experience.

Cautions

- Mimecast is heavily focused on email, and organizations retaining files, IM, and public and business social content types are still few.
- For the time being, Mimecast has limited capabilities for the financial services industry, and as new technology is rolled out, such as surveillance features, it needs to be vetted to make sure requirements are met.
- Ingestion into, and extraction from, the Mimecast archive has been noted as difficult in some cases, and customers moving large amounts of data can work with Mimecast's professional services team to aid in the migration of data.

Proofpoint

Proofpoint, based in Sunnyvale, California, provides a SaaS archiving offering, Proofpoint Enterprise, capable of archiving Microsoft Exchange, Office 365 Exchange Online, Windows File Shares, Microsoft SharePoint, Bloomberg and Skype for Business IM. In addition, Proofpoint's Enterprise Collaboration Archiving can capture content from Twitter, LinkedIn and Facebook, and enterprise social media such as Yammer, Chatter and Jive. Proofpoint has 10.5 PB under management across its hosted data centers, and maintains a presence across North America and EMEA to meet data sovereignty requirements. The product offerings are primarily sold through direct sales, with a smaller percentage through VARs and OEM agreements. Proofpoint sells compliance supervision for FINRA and similar financial compliance requirements, and has a customer base spread across regulated industries such as financial services, public sector and healthcare. Proofpoint backs its search performance with an SLA that guarantees delivery of data in 20 seconds or less, even as data grows. The largest email archiving production customer has more than 130,000 mailboxes. Moving forward, Proofpoint plans on offering focused solutions for highly regulated verticals and more capabilities to support Office 365, including enhanced analytics for e-discovery.

Strengths

- Proofpoint offers integrated email management capabilities such as security, spam filtering and continuity that round out a complete end-to-end set of capabilities for email.
- Compliance supervision capabilities are feature-rich and on a par with industry leaders.
- Proofpoint offers strong e-discovery capabilities, such as a one-click review/classification component.

Cautions

- The required on-premises appliance can be a concern for some customers that choose to implement the DoubleBlind Key Architecture.
- Pricing and licensing needs to be simplified for additional content types, such as files.
- Proofpoint mobile access capabilities is an area cited by customers as needing to be improved to enhance the end-user experience.

Smarsh

Primarily focused on the financial services market, Smarsh, headquartered in Portland, Oregon, continues strong growth in its SaaS-based archiving solution. Smarsh supports a wide variety of content types from email (Exchange, Office 365, Domino, and Gmail), business social media (Lync, Chatter, Yammer, Jive) to public social media (LinkedIn, Facebook, Twitter, Pinterest, and Instagram), in addition to other mobile and Web content. The pricing and licensing structure scales well for small and large organizations, and from few to many content types in a modular "pay as you grow" model. Archiving offers a consistent supervision and e-discovery workflow across all content types. Still very much a North America-centric company, the inroads made last year by opening a U.K. office are beginning to pay off; traction in that region is increasing with many large-scale proof of concept (POC) deployments. Smarsh's largest email archiving deployment is 30,000 mailboxes. On-demand file archiving and enhanced support for audio/voice archiving are some of the items on the Smarsh roadmap.

Strengths

- Smarsh Archiving Platform represents a unique, unified offering for supervision and e-discovery purposes that streamlines both processes.
- By continuing to add connectors for new business and social media content, Smarsh regularly enhances the Archiving Platform.
- Its pricing structure has been simplified, bringing Smarsh in line with other best-of-breed SaaS vendors.

Cautions

- Large enterprises should employ a POC to ensure that Smarsh can meet their needs; typical users of Smarsh are small or midsize businesses.
- The administrative console, including reporting, could be more intuitive and user friendly.
- While in-roads to new geographies are taking place, the company has work to do with localization (other than English) and a broader global focus.

Veritas

Veritas, headquartered in Mountain View, California, was formerly a part of Symantec. In August 2015, it was announced that Veritas was to be acquired by The Carlyle Group, a private equity firm. Veritas sells Enterprise Vault, the market-share-leading EIA on-premises platform. In addition to Enterprise Vault, Veritas offers Enterprise Vault.cloud as a SaaS offering and AdvisorMail for Enterprise Vault.cloud clients requiring write once, read many (WORM) storage. Enterprise Vault and Enterprise Vault.cloud support archiving Exchange, Domino and other mail applications via SMTP. Enterprise Vault.cloud supports archiving Microsoft Lync/Skype for Business on-premises and provides cloud file archiving for Box, SharePoint and Salesforce Chatter, although not for on-premises file systems. Enterprise Vault supports archiving files from various sources in addition to Windows File Shares. Enterprise Vault's largest customer has 240,000 mailboxes, while Enterprise Vault.cloud has 139,000. Enterprise Vault offers a separate module for e-discovery — Discovery Accelerator — while Enterprise Vault.cloud has recently added upgraded capabilities for e-discovery including search, tagging, legal hold, export and review. In 2015, Enterprise Vault enhanced SMTP Archiving, which allows for archiving any content sent via the SMTP protocol. This improvement was originally designed to streamline journal archiving by removing the need to maintain journal mailboxes on dedicated Exchange servers. Moving forward, Veritas plans to add support to Enterprise Vault for Lync/Skype for Business support.

Strengths

- Veritas has a good blend of compliance, e-discovery and retention management across a variety of content types.
- Enterprise Vault is a leading product for capturing all email content.

- Customer account management and relationships have improved in 2015, to the point that they are now a positive for Veritas.

Cautions

- It is not clear what the impact of the acquisition by The Carlyle Group means for all product futures and roadmaps. Prospects and customers should get clarification on these topics.
- Supervision capabilities are not as easy to use and not as robust as other competitors that support this functionality for financial services.
- Veritas Enterprise Vault.cloud has fallen behind competitors for ease of use, end-user access and e-discovery.

ZL Technologies

ZL Technologies is a privately held company, based in Milpitas, California. ZL Unified Archive is a scalable solution, often deployed by large enterprises, that enables unified archiving, supervision, records management, e-discovery and support for analytics as part of the same platform. Archiving functionality is available for Exchange, Office 365, Domino, Gmail, heterogeneous file systems, SharePoint, IM, social media and Web pages. ZL provides users the option to index and manage data in-place, which does not require it to be copied to the archive repository. Nearly half of ZL Technologies' customers are in financial services, for which it provides compliance supervision. ZL Unified Archive is available direct from the vendor and through channel partners. A number of large, specialty cloud providers (including RenewData and Viewpointe) utilize ZL as the technology powering their cloud archiving services. About two-thirds of ZL's revenue is generated in North America, but there is a strong presence in Asia, primarily in Japan. The vendor's largest email archiving implementation supports more than 200,000 mailboxes. ZL's planned product enhancements center around analytics for complex use cases, including fraud detection, and also on the roadmap are information governance initiatives to better manage the overall dataset across the organization.

Strengths

- ZL provides a scalable platform for large, complex and highly regulated environments.
- The support, engineering and management of ZL are highly involved with, and receive high praise from, customers.
- ZL's workflow of data capture, ingestion, policy assignment, case management and discovery works well, even in complex environments.

Cautions

- ZL's EIA offering is complex and can, therefore, be challenging to implement.
- The administrator user interface for the Unified Archive offering needs to be refreshed to make it more productive, user friendly and modern.
- Product releases have periodically been delivered behind schedule.

Vendors Added and Dropped

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

Added

No new vendors were added to this year's Magic Quadrant.

Dropped

Artec IT Solutions, MessageSolution, Metalogix, and OpenText were dropped from the Magic Quadrant this year because they did not meet the revenue criteria.

Inclusion and Exclusion Criteria

To be included in the 2015 EIA Magic Quadrant, a vendor must:

- Be the developer of the product, and not just a reseller or VAR.
- Support a growing base of customers, including at least 10 enterprise customers (5,000 users or more) that are using the software in a production environment for email archiving, and at least three of those are additionally using the product for other content archiving.
- Have a presence in at least two geographies worldwide and be industry-independent.
- Provide its solution as an on-premises software product, a SaaS offering, or some combination of the two. In 2014, achieve greater than $20 million for new license or maintenance revenue annually for its archiving solution, or must be close to this threshold, but also have deep capabilities for regulated environments. To verify this criterion is met, vendors must: (1) be included in the Gartner Market Share report for 2014, showing $20 million in EIA revenue, (2) be validated by Gartner analysts through independent industry sources, or (3) must provide audited financials signed by an outside auditor, and the CFO and/or CEO that this threshold is met.
- Have the ability to provide at least five references to support the criteria; three of these references should be using the product for email and other content archiving.

Although it is not an inclusion criterion, a vendor is strongly encouraged to brief Gartner on its product.

Evaluation Criteria

Ability to Execute

- **Product:** An evaluation of the features and functions of the vendor's EIA solution:

- Product must support integrated email and one other archiving content type, such as file.
- Integration must support:
  - Data reduction across multiple content types (e.g., deduplication, single-instance storage).
  - Common management across content types, for supported features (e.g., policy management, user definition, retention management, e-discovery features).
  - Full-text indexing and search for all content types.
- Its roadmap should support plans for continued integration of multiple content types.
- Higher ratings are assessed for support for Microsoft SharePoint, IMs, text messages, video/audio, social media content and structured data (applications and databases). That is, support for these content types is optional, but considered favorably.
- Higher ratings are assigned to solutions with strong archive architectures, policy-based archiving and mailbox management features (email), quality of user experience, e-discovery, and retention management capabilities.

- **Overall Viability:** Viability includes an assessment of the organization's overall financial health, as well as the financial and practical success of the business unit. This criterion takes into consideration the likelihood of the organization to continue to offer and invest in the product as well as the product position in the current portfolio.
- **Sales Execution/Pricing:** The organization'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:** This includes the 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 to changing market demands.
- **Marketing Execution:** This criterion assesses the clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand, increase awareness of products and establish a positive identification in the minds of customers. This "mind share" can be driven by a combination of publicity, promotional, thought leadership, social media, referrals and sales activities.
- **Customer Experience:** This measures the products and services and/or programs that enable customers to achieve anticipated results with the products evaluated. Specifically, this includes quality supplier/buyer interactions technical support, or account support. This may also include ancillary tools, customer support programs, availability of user groups, SLAs, etc.Vendors that charge reasonable extraction and ingestion fees for data will get higher marks (i.e., only charge professional services [PS] fees) than vendors that charge on a high per-TB basis.
- **Operations:** This includes the ability of the organization to meet goals and commitments. Factors include quality of the organizational structure, skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently.

Table 1. Ability to Execute Evaluation Criteria

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

Source: Gartner (October 2015)

Completeness of Vision

- **Market Understanding:** This assesses the vendor's ability to understand customer needs and translate them into products and services. Vendors that show a clear vision of their market listen, understand customer demands, and can shape or enhance market changes with their added vision.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:** Vendors are rated on clear, differentiated messaging consistently communicated internally, and externalized through social media, advertising, customer programs and positioning statements.
- **Business Model:** This is a measurement of the design, logic and execution of the organization's business proposition to achieve continued success.
- **Sales Strategy:** Participants are rated on a sound strategy for selling that uses the appropriate networks including direct and indirect sales, marketing, service, and communication; and partners that extend the scope and depth of market reach, expertise, technologies, services, and the customer base.
- **Offering (Product) Strategy:** This includes an approach to product development and delivery that emphasizes market differentiation, functionality, methodology, and features as they map to current and future requirements.
- **Vertical/Industry Strategy:** This encompasses the vendor's strategy to direct resources (sales, product, development), skills and products to meet the specific needs of individual market segments, including verticals.
- **Innovation:** This criterion includes an assessment of product leadership, and the ability to

deliver archiving features and functions that distinguish the vendor from its competitors. This includes 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 is gauged on directing resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, directly or through partners, channels and subsidiaries, as appropriate for that geography and market.

Table 2. Completeness of Vision Evaluation Criteria

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

Source: Gartner (October 2015)

Quadrant Descriptions

Leaders

Leaders have the highest combined measures of Ability to Execute and Completeness of Vision. They may have the most comprehensive and scalable products. They have a proven track record of financial performance and an established market presence. In terms of vision, they are perceived as thought leaders, with well-articulated plans for ease of use, product breadth and how to address scalability. For vendors to have long-term success, they must plan to address the expanded market requirements for EIA, including support for multiple content types, support for the cloud, solid relevant e-discovery functionality and a seamless user experience. Leaders not only must deliver to current market requirements, which continue to change, but also need to anticipate and begin to deliver on future requirements. A cornerstone for Leaders is the ability to articulate how these requirements will be addressed as part of their vision for expanded archive management. As a group, Leaders are considered as part of most new purchase proposals, and have high success rates in winning new business. There are six Leaders in this Magic Quadrant: Global Relay, HP, Mimecast, Proofpoint, Smarsh and Veritas.

Challengers

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

Visionaries

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

Context

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

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

Market Overview

The overall archiving market was $1.92 billion in 2014, and is expected to grow at a 9.1% compound annual growth rate (CAGR) through 2019. EIA has emerged as a commonly used technology

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

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

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

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

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

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