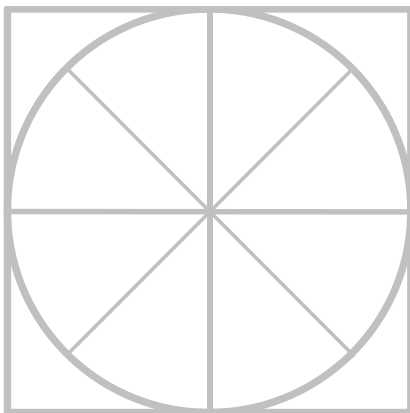




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# THE RADICATI GROUP, INC.

## On-Premises Information Archiving - Market Quadrant 2013



*An Analysis of the Market for  
Information Archiving Solutions,  
Revealing Top Players, Mature Players,  
Specialists and Trail Blazers.*

*September 2013*

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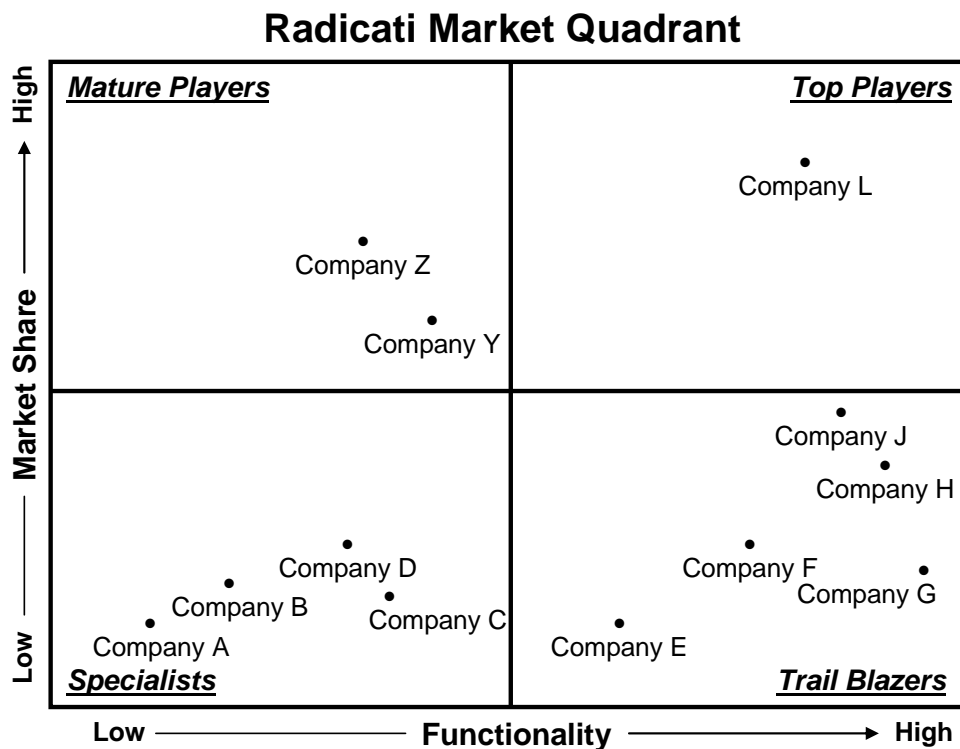
## RADICATI MARKET QUADRANTS EXPLAINED

Radicati Market Quadrants are designed to illustrate how individual vendors fit within specific technology markets at any given point in time. All Radicati Market Quadrants are composed of four sections, as shown in the example quadrant (Figure 1).

1. **Specialists** – This group is made up of two types of companies:
  - a. Emerging players that are still very new to the industry and have not yet built up much of an installed base. These companies are still developing their strategy and technology.
  - b. Established vendors that offer a niche product.
2. **Trail Blazers** – These vendors offer cutting edge technology, but have not yet built up a large customer base. With effective marketing and better awareness, these companies hold the power to dethrone the current market leaders. “Trail blazers” often shape the future of technology with their innovations and new products designs.
3. **Top Players** – These are the current leaders of the market, with products that have built up large customer bases. Vendors don’t become “top players” overnight. Most of the companies in this quadrant were first specialists or trail blazers (some were both). As companies reach this stage, they must fight complacency and continue product innovation, or else they’ll be replaced by the next generation of “trail blazers.”
4. **Mature Players** – These vendors have large, mature installed bases of customers, but no longer set the pace for the rest of the industry. These vendors are no longer considered “movers and shakers” like they once were.
  - a. In some cases, this is by design. If a vendor has made a strategic decision to move in a new direction, it may slow development on one product line and start another.
  - b. In other cases, a vendor may simply become complacent as a top vendor and be out-developed by hungrier “trail blazers” and other top players.

- c. Companies in this stage either find new life and revive their R&D, moving back into the “top players” segment, or else they slowly fade away as legacy technology.

Figure 1, below, shows a sample Radicati Market Quadrant. As a vendor continues to develop its product, it will move horizontally along the “x” axis. As market share changes, vendors move vertically along the “y” axis. It is common for vendors to move between quadrants over the life of a product, as their products improve and market requirements evolve.



**Figure 1: Sample Radicati Market Quadrant**

- **Functionality** – is rated from 1 to 10, with 10 being the highest, and 1 – the lowest.
- **Market Share** – is also rated from 1 to 10, according to the company’s ranking in our latest annual reports, based on its user Installed Base (e.g. the company with the largest installed base market share is number 1, the one with the second largest installed base market share is number 2, etc.).

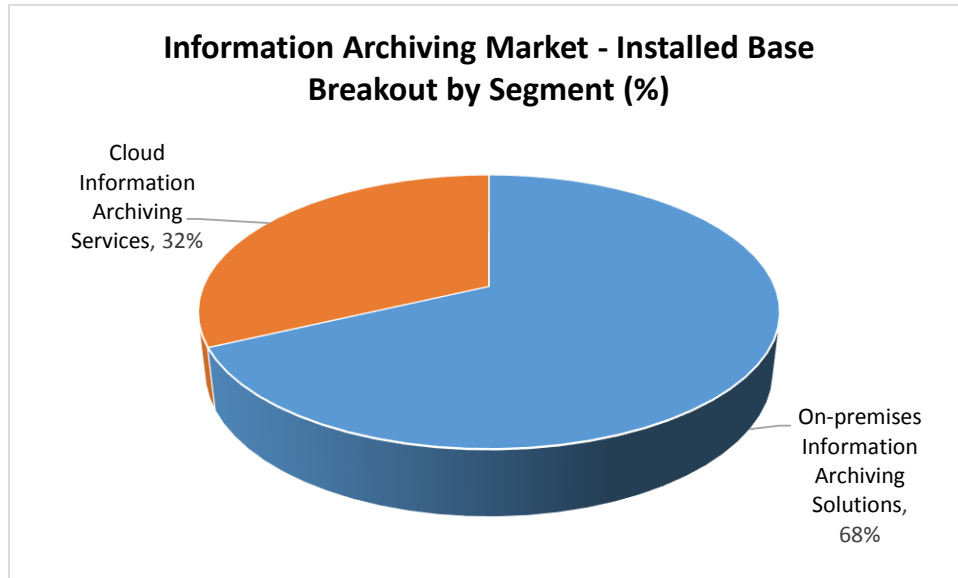
## MARKET SEGMENTATION – ON-PREMISE INFORMATION ARCHIVING SOLUTIONS

This edition of Radicati Market Quadrants covers the “**On-Premise Information Archiving Solutions**” segment of the Information Archiving market. Information archiving solutions provide interactive, secure long-term storage of electronic business content, including: email, instant messages, social media, file systems, Microsoft SharePoint content and other structured and unstructured information. In addition to providing information archiving, these solutions provide fast, easy search and retrieval of information, allow organizations to set granular retention policies and provide the foundation for eDiscovery, legal hold, and Data Loss Prevention (DLP).

A separate Radicati Market Quadrant is devoted to the “Cloud Information Archiving Services” segment of the Information Archiving market. On-Premise Information Archiving solutions are defined as follows:

- **On-Premise Information Archiving Solutions** – include information archiving solutions offered as on-premise products for enterprise deployment. Companies in this segment include: *ArcMail, Barracuda, EMC, HP Autonomy, IBM, Metalogix, Microsoft, OpenText, Symantec*, and others.
- One of the primary catalysts driving the rapid adoption of archiving solutions has been the dramatic rise in enterprise content being generated in recent years. Businesses have been forced to reevaluate their corporate storage policies due to the growing number of enterprise content sources that continue to be deployed today. Email has remained the most popular form of content that businesses are most concerned about archiving. However, the wide spread proliferation of solutions such as, Microsoft SharePoint, social media, and enterprise IM is also driving the need more archiving solutions.
- Many of the on-premise archiving vendors are large, established players that offer archiving solutions as part of a broader information governance product portfolio. These vendors typically offer their archiving solutions alongside complementary products such as eDiscovery, DLP, security, mobile device management (MDM), and more. There are few pure-play archiving vendors in the on-premise segment.

- On-premise archiving deployments continue to outnumber cloud-based deployments. While the growth rate of the on-premise archiving segment is slowing down, demand will remain strong as the benefits of cloud-based archiving services do not outweigh the benefits of on-premises archiving solutions, especially for businesses in heavily regulated industries. On-premise solutions account for 68% of information archiving users in 2013, while 32% of users are relying on a cloud information archiving service (Figure 2 below).



**Figure 2: Information Archiving Market – Breakout by Segment, 2013**

## EVALUATION CRITERIA

Vendors are positioned in the quadrant, according to two criteria: Market Share, and Functionality.

**Market Share** – is based on the installed base published in our “Information Archiving Market, 2013-2017” report. The vendor with the largest installed base has a market share of 1, the one with the second largest installed base has a market share of 2, etc. In order for a vendor to be positioned in the Top Player or Mature quadrants, they need to have a market share of 1 to 5. Vendors with smaller installed bases, are positioned either in the Trail Blazer, or Specialist quadrants.

**Functionality** – we assess each vendor’s solution based on a number of key features that they offer out of the box. These capabilities do not necessarily have to be the vendor’s own original technology, but they should be pre-integrated and available for deployment when the solution is purchased.

In order for an archiving vendor to be on the right side of the quadrant (*Top Player* or *Trail Blazer*), their solution should have the following capabilities:

- *Email Platform Support* – The range of email platforms supported (i.e. Microsoft Exchange Server, IBM Lotus Domino Server, Novell GroupWise Server, etc.).
- *Support for Multiple Content Sources* – Archiving a range of information types, including: email, file systems, Microsoft SharePoint, social media (enterprise and consumer services), IM, voice/video, etc.
- *Deployment Options* – Availability of the solution as on-premises solutions, cloud-based services, hybrid, and appliances.
- *Automated Indexing of Content* – Archived information is automatically indexed and tagged to simplify future searches.
- *Storage Reduction* – The removal of redundant data from repositories is an important capability that is necessary in order to maintain storage efficiency, reduce storage space,

and improve disaster recovery procedures. Single instance storage (SIS) or data deduplication are some of the technologies that enable this functionality.

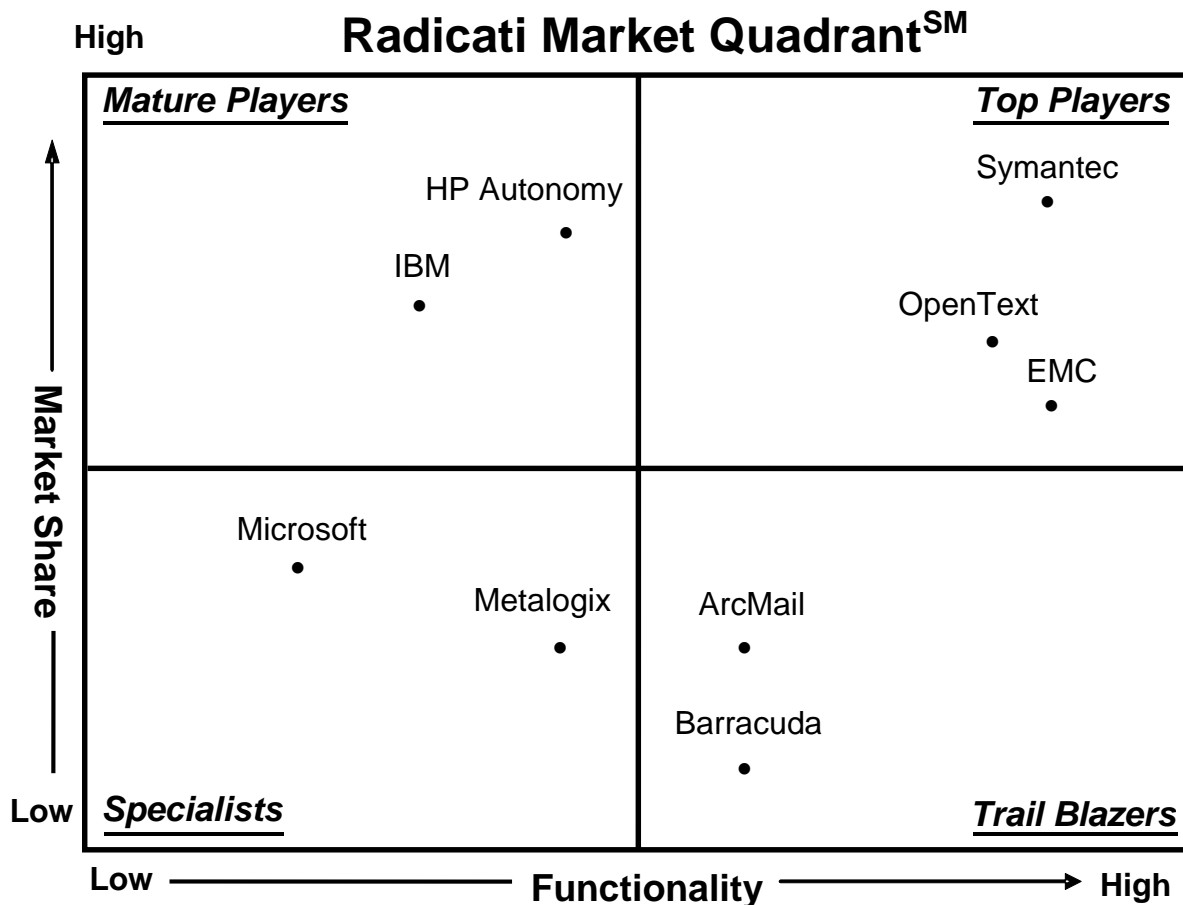
- *Search* – In addition to basic search functionality (search by sender, recipient, subject, date or contents of a message) information archiving solutions should provide a robust set of advanced search capabilities, including: concept, Boolean, proximity, and more.
- *Archive Access* – Archived information should be accessible through a web-based client. Users should also be able to access their archived email messages directly from their email client.
- *Define Retention Policies* – Businesses should be able to define retention periods for archived data depending on their own retention schedules. Disposition of archived data can occur by age, date, user, folder, sender, recipient, subject, etc.
- *Cloud Messaging Support* – Information archiving solutions may be able to support both on-premise messaging, i.e. Microsoft Exchange Server, as well as cloud-based messaging, i.e. Microsoft Office 365 or Google Apps.
- *eDiscovery Capabilities* – eDiscovery capabilities could be integrated with the archive, or offered separately. Common eDiscovery features include: legal hold, advanced search, tagging, and data export.
- *Data Migration for Legacy Systems* – Information archiving solutions may be able to provide support for the migration of data from legacy archives. Importing of legacy data in PST, NSF, and other common email formats can be offered by some archiving vendors.
- *Website Archiving* – Website archiving enables businesses to capture and preserve full websites in their original format in the event that they need to be produced for litigation and eDiscovery or to comply with regulatory requirements. Web pages, blog posts, images, videos and more can be stored in an archive in their native formats.
- *Mobile Access* – Access to archived content through a mobile web-based browser (i.e. smartphone, tablet, laptop, etc.). Downloadable mobile apps specialized for specific mobile OS's are also available from many information archiving vendors.



- *Multi-language Localization* – Vendors may offer archiving solutions that support multiple languages.
- *Other Unique Features and Capabilities.*

**Note:** *On occasion, we may put a player on the right side of the quadrant by giving them a higher than typical Functionality Score, even if they are missing one or two of the features mentioned above, if we feel that the other aspects of their solution are very unique and innovative.*

**MARKET QUADRANT – ON-PREMISE INFORMATION ARCHIVING SOLUTIONS**



**Figure 3: On-Premise Information Archiving Solutions Market Quadrant, 2013**

*Note: EMC's installed base includes EMC SourceOne and EMC EmailXtender.*

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## KEY MARKET QUADRANT TRENDS

- The **Top Players** in the On-Premise Information Archiving market, today, are Symantec, OpenText, and EMC.
  - *Symantec* offers one of the most thorough product portfolios to help organizations satisfy their archiving and broader information governance needs. Symantec's Enterprise Vault offers archiving of email, Microsoft SharePoint content, IMs, BlackBerry data, file servers, social media content, and more. A key differentiator for Symantec is their portfolio of complementary products, which include eDiscovery and security solutions.
  - *OpenText* offers one of the most comprehensive Enterprise Information Management (EIM) product portfolios in the market today. Information archiving is a key piece of OpenText's platform. OpenText Archive provides a comprehensive archiving platform for businesses that need to store and access a broad range of different types of enterprise information. Email, file systems, Microsoft SharePoint, social content, and more are made available in a single, scalable repository.
  - *EMC's* SourceOne and EmailXtender portfolio of products include archiving solutions for email, Microsoft SharePoint, file systems, and more. One of EMC's key differentiators is that they offer simultaneous support of Microsoft Exchange Server and IBM Domino Server; this is key for larger sized businesses that may have distributed workforces running multiple messaging environments.
- The **Trail Blazers** quadrant includes ArcMail and Barracuda.
  - *ArcMail's* solutions support a wide range of digital assets and content types including email archiving of Google Apps email, Gmail, Microsoft Office 365 and other products; Salesforce.com Chatter, Microsoft SharePoint and other collaboration platforms; as well as enterprise social media and more. ArcMail has remained one of the more progressive vendors in the archiving market, introducing new features in a timely matter.

- **Barracuda** Message Archiver is an appliance-based archiving solution that supports email and other forms of enterprise content. Barracuda offers archiving support for popular cloud messaging platforms, including Microsoft Office 365 and Google Apps Gmail. Barracuda offers intuitive native mobile apps for Apple iOS and Google Android mobile devices.
- The **Specialists** quadrant includes Microsoft, and Metalogix. Solutions in the Specialist quadrant offer interesting features and capabilities, however, they do not offer sufficiently innovative features to be considered a Trail Blazer and also do not yet have a large enough installed base to place in the Top Player quadrant.
  - **Microsoft** has continued to improve the native archiving capabilities within their enterprise messaging platform with each new release of Microsoft Exchange Server. With Microsoft Exchange Server 2013, Microsoft has added a number of archiving enhancements including archiving support for Microsoft SharePoint and Microsoft Lync content, in addition to improved in-place legal hold and in-place discovery features.
  - **Metalogix** Archive Manager provides archiving support for Microsoft Exchange Server and Microsoft file systems. Archive Manager Exchange Edition provides archiving support and native single-instance storage functionality enabling businesses the ability to remove multiple copies of the same emails and attachments across an entire message store.
- The **Mature Players** quadrant includes HP Autonomy and IBM.
  - **HP Autonomy** supports a broad range of content sources with their Autonomy Consolidated Archive (ACA) solution, including: email, IM, Microsoft SharePoint, social media, voice recordings, and more. However, HP Autonomy has been heavily focused on integrating their disparate collection of solutions rather than emphasizing product innovation.
  - **IBM** offers IBM Content Collector (ICC), an archiving solution that captures and preserves content in a centralized repository. Organizations can capture, index, manage, audit, as well as dispose of archived content based on established rules.

While IBM provides a robust portfolio of archiving solutions, the complexity of deploying and managing these solutions has limited IBM's appeal among some customers.

## VENDOR ANALYSIS

### TOP PLAYERS

#### **SYMANTEC**

350 Ellis Street

Mountain View, CA 94043

[www.symantec.com](http://www.symantec.com)

As one of the world's largest software companies, Symantec provides a broad range of security and information management solutions and services for consumers and businesses. Symantec's product portfolio includes solutions for: archiving, eDiscovery, security and more.

The latest version of Symantec's on-premises archiving solution, **Enterprise Vault**, version 10, was released in August 2011.

Symantec's cloud-based archiving solution, Enterprise Vault.cloud, is based on technology developed by LiveOffice, a software company acquired by Symantec in 2012.

Symantec's on-premise Archiving solution, **Enterprise Vault**, offers archiving of email, Microsoft SharePoint content, IMs, BlackBerry data, file servers, social media content, and more. Enterprise Vault's product portfolio includes:

- **Enterprise Vault for Microsoft Exchange** – A stand-alone software based solution, which offers automated Microsoft Exchange Server mailbox management via active mailbox and journal archiving.
- **Enterprise Vault for Domino** – Offers a similar mailbox and journal archiving feature set to Enterprise Vault for Microsoft Exchange but for IBM Domino environments.
- **Enterprise Vault for Microsoft SharePoint**– Offers comprehensive archiving support for Microsoft SharePoint 2007, 2010 and 2013, Windows SharePoint Services 3.0, and Microsoft SharePoint Foundation.

- **Enterprise Vault Discovery Accelerator** – A search and eDiscovery solution that expedites the identification, legal hold, and review process across all content within the Enterprise Vault archive for litigation and internal investigations.

*FUNCTIONALITY: 9*

*MARKET SHARE: 1*

*KEY STRENGTHS:*

- Symantec’s archiving solutions offer one of the most thorough product portfolios to help organizations satisfy their archiving and broader information governance needs. Symantec appeals to a wide range of businesses as they provide both on-premise and cloud services.
- In addition to Microsoft Office 365 archiving capabilities, Enterprise Vault captures other cloud-based information sources. Enterprise Vault archives websites and social media including Facebook, Twitter, and LinkedIn. Enterprise Vault.cloud archives files stored in Box as well as Salesforce Chatter communications.
- Enterprise Vault archives the most commonly used electronic communication tools, including Microsoft Exchange Server, Microsoft Office 365, IBM Domino Server, Microsoft SharePoint, and BlackBerry. Enterprise Vault also archives on-premise data sources such as file systems, attachments in SAP databases, and metadata for video and audio.

*WEAKNESSES:*

- Enterprise Vault lacks a seamless mobile experience for end users.
- With a powerful set of features, Enterprise Vault requires an adequate budget and personnel in order to fully maximize the platform’s potential.

## **OPENTEXT**

275 Frank Tompa Drive  
Waterloo, ON  
N2L 0A1  
Canada  
[www.opentext.com](http://www.opentext.com)

OpenText is an Enterprise Information Management (EIM) software company that focuses on five key EIM offering categories: Enterprise Content Management (ECM), Business Process Management (BPM), Customer Experience Management, Information Exchange, and Discovery solutions. OpenText EIM includes solutions for archiving, eDiscovery, email management, collaboration, social media, business process management and more. OpenText was founded in 1991 and is headquartered in Ontario, Canada.

In March 2013, OpenText released OpenText Archive, a single software solution that supports a broad range of enterprise content. OpenText Archive utilizes a single, scalable repository to store and access critical business information.

**OpenText Archive** provides a single solution for the storage of information that can be accessed throughout the content lifecycle. OpenText Archive supports the following types of enterprise content: email, file systems, Microsoft SharePoint, social content, rich media assets, web content, and faxes.

OpenText also offers several individual archiving software products that can be deployed together or separately. Solutions are available for Microsoft Exchange Server, IBM Lotus Server, Microsoft SharePoint, SAP and file systems.

*FUNCTIONALITY: 8*

*MARKET SHARE: 4*



*KEY STRENGTHS:*

- The OpenText Archive provides a comprehensive archiving platform for businesses that need to store and access a broad range of different types of enterprise information. Email, file systems, Microsoft SharePoint, social content, and more are made available in a single, scalable repository.
- OpenText provides a broad set of enterprise information management products that tightly integrate with their information archiving solutions. Few vendors in the market are able to match the breadth of OpenText's EIM solutions.
- Open Text Auto-classification provides content analytics and transparent auto-classification/metadata management of huge volumes of enterprise information. This ensures that the unsustainable growth of enterprise information doesn't prevent organizations from retaining and disposing of content in a responsible manner – nor adversely impact day to day business activities to accommodate governance needs.
- OpenText provides the flexibility to archive and apply various retention or records management policies to a broad range of both structured and unstructured content types – in a single managed system.

*WEAKNESSES:*

- The archiving solutions offered by OpenText are typically suited for larger sized businesses that have the necessary budgets and personnel to adequately deploy and maintain them on an ongoing basis.
- Maximum return on investment will occur for businesses utilizing OpenText's broad range of Enterprise Information Management solutions. This can become an expensive proposition as OpenText's product portfolio includes a number of different solutions.
- OpenText delivers their archiving products as on-premises solutions only; cloud-based archiving services are not currently supported by OpenText.

## EMC

176 South Street  
Hopkinton, MA 01748  
www.emc.com

EMC is a leading provider of enterprise information and virtual infrastructure technologies and solutions. EMC's product portfolio includes hardware and software for archiving, storage, backup and recovery, disaster recovery, and more. EMC was founded in 1979 and is headquartered in Hopkinton, Massachusetts.

The **EMC SourceOne** portfolio of products includes archiving solutions for email, Microsoft SharePoint, file systems, and more. The SourceOne suite includes the following products:

- **EMC SourceOne Email Management for Microsoft Exchange** – offers a centralized archive for managing emails, attachments, and IM messages.
- **EMC SourceOne Email Management for IBM Lotus Notes Domino** – offers the same capabilities for the IBM Lotus Notes Domino platform as the Microsoft Exchange Server solution.
- **EMC SourceOne for Microsoft SharePoint** – enables active content externalization and inactive content archival of all data found in Microsoft SharePoint, including wikis, blogs, contacts, etc.
- **EMC SourceOne for File Systems** – extends the EMC SourceOne platform, enabling organizations to add the management of unstructured file system content to the EMC SourceOne environment.
- **EMC SourceOne Discovery Manager** – offers discovery and management of content during a legal or regulatory investigation or during an internal policy complaint.

EMC announced end of support for its previous generation archiving solution, **EmailXtender**, in March 2012 with an extended support option to 2014. EMC is migrating EmailXtender customers to SourceOne.

*FUNCTIONALITY: 9*

*MARKET SHARE: 5*

*KEY STRENGTHS:*

- Archiving of Microsoft Office 365 services, including Microsoft Exchange and Microsoft SharePoint, are supported by EMC SourceOne.
- Simultaneous support of Microsoft Exchange Server and IBM Domino Server is a key differentiator for EMC's SourceOne solution. Many businesses utilize a dual messaging environment and find EMC's archiving support for both messaging platforms to be very important.
- Multiple Microsoft SharePoint sites and farms can be supported by EMC SourceOne for Microsoft SharePoint, and the product supports active content with Microsoft's recommended externalization API, and archives inactive content (content not in regular use and sitting idle on SharePoint's servers).
- EMC SourceOne solutions offer unified search and management of all content, including email messages and attachments, Microsoft SharePoint content, and file systems, from a centrally managed web search interface.

*WEAKNESSES:*

- Archiving of social media content is not available natively, and is only offered through EMC's partners.
- EMC does not offer dedicated mobile apps for their archiving solutions. Users that want to access content from their mobile devices must utilize the solution from their mobile web browser.

## **TRAIL BLAZERS**

### **ARCMAIL**

6300 E. Texas, Suite #255

Bossier City, LA 71111

[www.arcmail.com](http://www.arcmail.com)

ArcMail is a developer of email archiving and management solutions for businesses of all sizes, across a wide range of vertical markets. ArcMail provides archiving solutions for on-premise, in the cloud, or in hybrid or virtualized environments. Founded in 2005, ArcMail is headquartered in Bossier City, Louisiana.

ArcMail's solutions support a wide range of digital assets and content types including hosted email archiving of Google Apps email, Gmail, Microsoft Office 365 and other products; Salesforce.com Chatter, Microsoft SharePoint and other collaboration platforms; as well as enterprise social media and more.

**ArcMail Defender** – is an on-premise email archiving solution that is offered as eight different appliances that range from 1TB to 32 TB of storage, depending on the needs of customers.

- **ArcMail Guardian for Cloud-Based Email Platforms including Google Apps Email, Gmail and Office 365** – An archiving solution that automatically encodes, indexes, and archives all inbound, outbound and internal email.
- **ArcMail for SharePoint** – An all-in-one archiving solution that lets users search multiple, fully-indexed data sources simultaneously, from Microsoft SharePoint to Microsoft Exchange Server, Google Apps Gmail and other messaging platforms.
- **ArcMail for Salesforce.com Chatter** – Integration with the ArcMail Defender solution enables secure storage of all Salesforce Chatter data.
- **ArcMail Social** – Designed for information governance and archiving of corporate social media data, ArcMail Social is available as an add-on module for any ArcMail Defender archiving solution – from the company's on-premise, to its cloud / storage gateway, hybrid and virtual offerings.

- **ArcMail for File Systems** – In beta, ArcMail has moved fully into the enterprise archiving space with the ability to archive Microsoft and Linux-based file systems.

*FUNCTIONALITY: 6*

*MARKET SHARE: 7*

*KEY STRENGTHS:*

- ArcMail recently launched its Defender Cloud / Storage Gateway, which offers a hybrid approach to archiving that allows organizations to designate archived files for storage in both cloud and on-premises environments.
- ArcMail's archiving appliance provides support for a wide range of enterprise information, including: enterprise social media; cloud-based email including Google Apps email, Gmail and Microsoft Office 365, virtual computing/VMware environments, Microsoft SharePoint, Salesforce.com Chatter; and 16 different server-based email platforms including Microsoft Exchange Server.
- The appliance based nature of ArcMail Defender makes it a simple archiving solutions to deploy and manage.
- ArcMail's appliances are highly scalable and can accommodate up to 30,000 users per server.

*WEAKNESSES:*

- ArcMail does not currently offer a cloud-based version of their archiving solutions, however, it is a roadmap feature that they plan to introduce by year-end 2013.
- ArcMail's Defender solution lacks optimized mobile apps for end users and administrators.
- ArcMail has a limited international presence.

## **BARRACUDA**

3175 Winchester Blvd

Campbell, California 95008

www.barracuda.com

Barracuda Networks is a computer security and data storage vendor that focuses on providing enterprise solutions for security, storage, and application delivery. Barracuda traditionally offers their products as appliance-based hardware, but also provides virtual and cloud based solutions. Founded in 2003, Barracuda has established itself as a leading security and storage company serving organizations of all sizes from SMB to large enterprises.

The **Barracuda Message Archiver** is an appliance-based archiving solution that supports email and non-email enterprise content. The key features of Barracuda Message Archiver include:

- *Comprehensive Archiving* – Live and historical emails can be captured. Support for email and non-email content archiving enables users to store and access messages, appointments, contacts, notes, and tasks.
- *Storage Management* – Stubbing allows messages to be moved to the Barracuda Message Archiver where they can be accessed through a link to the storage archives.
- *Access and Search* – Role-based administration enables different levels of access for administrators, auditors, or users. Full-text searches can be conducted based on tags, header fields, or message content. Archived content can be accessed through the Microsoft Outlook interface or through Barracuda's apps for Windows, Mac, iPhone and Android.
- *Policy Driven Alerts and Retention Policies* – Customized archiving policies can be set to comply with government regulations or to maintain company records. Policies can be defined based on message age (time), senders/recipients, content, headers, or attachments.

*FUNCTIONALITY: 6*

*MARKET SHARE: 9*

*KEY STRENGTHS:*

- The three tiered role-based administration feature enables organizations to setup and define unique access rights for administrators, auditors, and users.
- The Barracuda Message Archiver supports the archiving of popular cloud messaging services such as Microsoft Office 365 and Google Apps Gmail.
- Native mobile apps are available for Apple iOS and Android devices. Barracuda also offers support for other mobile devices via web-based access.

*WEAKNESSES:*

- Barracuda Message Archiver lacks support for archiving of Microsoft SharePoint and file systems content, however, Barracuda does expect to add this functionality in an update to their solution in 2014.
- Barracuda's archiving solutions are available as on-premises appliances only. Barracuda does not currently offer software or cloud-based versions of their archiving services, however, Barracuda expects to launch a cloud archiving service in 2014.
- Email archiving support for IBM Domino Server and Novell GroupWise server is limited to email only. PIM items cannot be archived.
- Barracuda offers limited archiving support for enterprise social media services, and IM services.

## **SPECIALISTS**

### **MICROSOFT**

One Microsoft Way  
Redmond, WA 98052-6399  
www.microsoft.com

Microsoft is the world's largest software company and provides a broad range of products and services for businesses and consumers. Microsoft has an extensive product portfolio that includes solutions for: office productivity, messaging, collaboration, and more.

**Microsoft Exchange Server** and **Microsoft Exchange Online** – offer native archiving and compliance features available as an on-premise solution, cloud service, or hybrid solution. The key archiving features include:

- *Personal Archive* – The Personal Archive feature is a specialized mailbox that integrates with a user's primary mailbox.
- *Retention Policies* – Retention policies can be defined to dispose of email messages after a certain period of time.
- *Multi-mailbox Search* – Enables searches across a broad range of mailbox items, including: mail, attachments, calendar appointments, tasks, and contacts.
- *Legal Hold* – Administrators can place specific mailboxes on litigation hold during a pending or ongoing legal investigation.
- *Importing Historical Data* – Historical email data from PSTs can be imported directly into Microsoft Exchange Server.

Microsoft Exchange Server 2013 includes a number of new archiving and compliance enhancements. The key features that Microsoft includes with the latest version of Microsoft Exchange Server include in-place legal holds and in-place discovery.



*FUNCTIONALITY: 3*

*MARKET SHARE: 6*

*KEY STRENGTHS:*

- With Microsoft Exchange Server 2013, Microsoft has added archiving support for Microsoft SharePoint and Microsoft Lync content.
- The tight integration between the new in-place legal holds and in-place discovery features allows users to simultaneously search and place holds on content within the same interface and query.
- The multi-mailbox feature is a convenient feature, especially for businesses running multiple Microsoft Exchange servers in different geographic locations.
- For basic eDiscovery, Microsoft Exchange Server's legal hold feature prevents emails from being deleted or edited during an internal or external investigation. The length of time for a litigation hold can also be specified.

*WEAKNESSES:*

- Businesses that are not Microsoft-centric may have issues with Microsoft's lack of archiving support for non-Microsoft content. Add-on solutions or third-party archiving software would need to be deployed to satisfy these needs.
- Message archiving is considered a premium feature and requires an Enterprise CAL for customers that want to enable this functionality.
- Microsoft Exchange Server does not offer single instance storage, instead it keeps multiple copies of email messages and attachments. This requires an increase in storage capacity and can also affect Microsoft Exchange Server's backup and restore capabilities.

## **METALOGIX**

5335 Wisconsin Ave NW

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Washington DC, 20015

www.metalogix.com

Metalogix is a content infrastructure vendor that provides enterprise solutions for: archiving, content management, migration, storage, and protection. Metalogix focuses on providing software for Microsoft Exchange Server, Microsoft SharePoint, and cloud computing platforms. Founded in 2001, Metalogix is headquartered in Washington, DC.

Metalogix's **Archive Manager** solution provides archiving support for Microsoft Exchange Server and file systems. The key features of these two products include:

- *Archive Manager Exchange Edition* – Utilizing a hybrid deployment architecture, Archive Manager Exchange Edition provides archiving support for Microsoft Exchange Server customers both on-premise or in the cloud.
- *Archive Manager Files Edition* – A software-based file archiving system, Files Edition utilizes its Hierarchical Storage Management (HSM) and continuous single-instance storage (SIS) for file server archiving and migration, for Windows-based filers as well as NetApp and EMC filers.
- *StoragePoint* – A software based storage optimization and archiving solution for Microsoft SharePoint. StoragePoint utilizes both External BLOB Storage (RBS) and Remote BLOB Storage (RBS) to provide support for Microsoft SharePoint 2007, 2010, and 2013.

*FUNCTIONALITY: 5*

*MARKET SHARE: 7*

*KEY STRENGTHS:*

- Customers using multiple Metalogix Archive Manager products can conduct federated searches and single-instance storage across all Microsoft Exchange Server, file systems, and Microsoft SharePoint environments.
- Searches of archived content via the Microsoft Outlook interface, Outlook Web Access, or the secure web console provide users with anywhere access regardless of the type of device they are using.
- Metalogix's supplementary migration solutions provide organizations with a number of options for both legacy archiving migrations and Microsoft Exchange Server migrations.

*WEAKNESSES:*

- Metalogix is suitable for Microsoft-centric organizations, however, their lack of support for other leading messaging platforms, such as IBM Domino and Novell GroupWise Server, limit Metalogix's reach in the Information Archiving market. However, their new offering, "Email Migrator", shows promise of bridging this gap to help organizations move to other platforms.
- Metalogix focuses primarily on delivering their archiving products as on-premises solutions. Limited support for cloud-based archiving services is currently available.
- Metalogix's solutions lack support for social media and website archiving.

## **MATURE PLAYERS**

### **HP AUTONOMY**

3000 Hanover Street  
Palo Alto, CA 94304  
www.hp.com

HP provides software and hardware solutions for consumers and enterprises. HP's products include storage, software, laptops and desktops, mobile devices, networking solutions, and more.

**Autonomy Consolidated Archive (ACA)** offers an integrated end-to-end information archiving solution to enable intelligent control and management of data, support litigation preparedness, and ensure business, industry and regulatory compliance. The key features of ACA include:

- *Archiving* – automatically archives data from multiple channels and within a broad range of repositories including email, IM, social media, video, audio, and other structured/unstructured data.
- *Supported Content Sources* – supports Microsoft Exchange Server, IBM Lotus Domino Server, and Microsoft SharePoint, as well as over 400 target repositories, including IM, audio, video, social network and website content, and structured data sources.
- *Anywhere Access* – users can access their archived content from their mobile devices, including smartphones, tablets, and desktop computers.
- *Cloud Connect* – for businesses looking to migrate their data into a hosted environment, ACA and Digital Safe include a feature that enables a hybrid archiving solution, allowing businesses to move data from on-premise servers to a secure, private cloud at their own pace.
- *Integration with HP Autonomy's information governance suite* – streamlined integration with the HP Autonomy's information governance framework expands the solution to include supervision, records management, enterprise eDiscovery, and automated records classification capabilities.

*FUNCTIONALITY: 5*

*MARKET SHARE: 2*

*KEY STRENGTHS:*

- ACA supports a broad range of content sources, including: email, IM, Microsoft SharePoint, social media, voice recordings, and more.
- Supported email platforms include: Microsoft Exchange Server, IBM Lotus Domino Server, Novell GroupWise Server, Gmail, Office 365 and other email systems.
- ACA provides intelligent understanding and rich visibility across all forms of information to support business critical functions including search, eDiscovery, preservation, and regulatory compliance within all repositories.
- HP Autonomy's archiving and eDiscovery products offer enterprise-grade scalability and flexibility as on-premise, hosted, or hybrid solutions.

*WEAKNESSES:*

- HP Autonomy's solutions are able to meet the most rigorous compliance requirements of large global enterprises; smaller sized businesses may find the solutions to be complex and difficult to manage, but have the ability to utilize Digital Safe as a scalable hosted solution to better meet their specific business needs.
- HP Autonomy does not offer a native DLP solution, however, they do deliver some DLP functionality through their information governance framework.
- HP Autonomy does not offer optimized apps for mobile platforms, such as Apple iOS and Google Android.
- HP Autonomy continues to be vague about its roadmap and remains heavily focused on integrating its messy portfolio of solutions, rather than providing innovation in line with changing customer requirements.

## **IBM**

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www.ibm.com

IBM entered the email archiving market in 2001 with its CommonStore product, and has had other archiving offerings including storage and SAP archiving offerings since before 2001. Today, IBM offers its Content Collector archiving solution which is based on technology acquired from FileNet, as well as its own CommonStore solution.

**IBM Content Collector (ICC)** is an archiving solution that captures and preserves content in a centralized repository. The key features of ICC include:

- *Supported Content* – ICC supports IBM Lotus Domino Server, Microsoft Exchange Server, Microsoft SharePoint sites, IBM Connections, SAP application, and file systems. ICC is extensible with an open API for other sources.
- *Automatic and Interactive Archiving* – Administrators can setup automated archiving schedules and select the source to be archived such as email clients, applications, user groups, servers, or storage systems.
- *Accessing Content* – Users can search, preview, and restore archived content from the central repository.
- *Email Management* – New email management features include several enhancements, including: greater control over IBM Lotus Domino messages, support for the ribbon style of ICC in Microsoft Outlook 2010, enhanced stubbing options, and more.
- *Integration with IBM Connections and Microsoft SharePoint* – IBM Connections and Microsoft SharePoint Server.
- *Supplementary Solutions* – IBM Content Collector also integrates with IBM Content Analytics and IBM eDiscovery products to provide a complete information lifecycle governance platform.

*FUNCTIONALITY: 4*

*MARKET SHARE: 3*

*KEY STRENGTHS:*

- IBM offers a robust collection of Information Lifecycle Governance solutions, with Content Collector being one of the primary products under this umbrella. For businesses interested in satisfying a broad Information Governance strategy, IBM provides all the necessary solutions to accomplish this task.
- IBM's SmartCloud services provide affordable, low-maintenance archiving options for smaller sized businesses with limited budgets and personnel resources.
- IBM Content Collector supports popular enterprise messaging platforms, including IBM Lotus Domino Server, Microsoft Exchange Server, and Novell GroupWise Server.
- Several content sources can be archived and managed, including: email messages and attachments, IBM Connections, SAP applications, Microsoft SharePoint content, and file systems.

*WEAKNESSES:*

- IBM's portfolio of Information Lifecycle Governance solutions include many different products and capabilities, however the complexity of these products can be overwhelming for some potential customers.
- To fully realize IBM Content Collector's potential, businesses will need to be operating within an IBM-centric environment. Without IBM's complementary solutions, IBM Content Collector may be underutilized.
- IBM Content Collector does not offer archiving support for popular cloud messaging platforms, such as Microsoft Office 365 or Google Apps.
- IBM Content Collector does not offer native archiving support of social media.

**THE RADICATI GROUP, INC.**  
**<http://www.radicati.com>**

The Radicati Group, Inc. is a leading Market Research Firm specializing in emerging IT technologies. The company provides detailed market size, installed base and forecast information on a worldwide basis, as well as detailed country breakouts, in all areas of:

- **Email**
- **Security**
- **Instant Messaging**
- **Unified Communications**
- **Identity Management**
- **Web Technologies**

The company assists vendors to define their strategic product and business direction. It also assists corporate organizations in selecting the right products and technologies to support their business needs.

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### Currently Released:

Title	Released	Price*
Instant Messaging Market, 2013-2017	Sept. 2013	\$3,000.00
Information Archiving Market, 2013-2017	Aug. 2013	\$3,000.00
Business User Survey 2013	Aug. 2013	\$3,000.00
Cloud Business and Consumer Email Market, 2013-2017	July 2013	\$3,000.00
Enterprise Content Management, 2013-2017	May 2013	\$3,000.00
Corporate Web Security Market, 2013-2017	May 2013	\$3,000.00
Email Statistics Report, 2013-2017	Apr. 2013	\$3,000.00
Microsoft SharePoint Market Analysis, 2013-2017	Mar. 2013	\$3,000.00
Microsoft Exchange, Office 365, and Outlook Market Analysis, 2013-2017	Mar. 2013	\$3,000.00
Content-Aware Data Loss Prevention Market, 2013-2017	Mar. 2013	\$3,000.00
Mobile OS and Messaging Market Analysis, 2012-2016	Dec. 2012	\$3,000.00
Instant Messaging Market, 2012-2016	Dec. 2012	\$3,000.00
Mobile Device Management Market, 2012-2016	Nov. 2012	\$3,000.00
Email Market, 2012-2016	Oct. 2012	\$3,000.00
eDiscovery Market, 2012-2016	Oct. 2012	\$3,000.00
Hosted Email and Collaboration Market, 2012-2016	Aug. 2012	\$3,000.00

**\* Discounted by \$500 if purchased by credit card.**

### Upcoming Publications:

Title	To Be Released	Price*
Mobile Device Management Market, 2013-2013	Oct. 2013	\$3,000.00
Messaging Platforms Market, 2013-2017	Oct. 2013	\$3,000.00

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