Magic Quadrant
for E-Mail Active Archiving

The e-mail active archiving market has evolved, with vendors offering solutions to meet the broad range of functionality and price requirements. Emerging e-mail archiving vendors will often win on price as their products mature and gain the interest of larger organizations.

WHAT YOU NEED TO KNOW

Gartner's 2009 Magic Quadrant for E-Mail Active Archiving is designed to help enterprises identify a set of e-mail archiving products to evaluate as part of an effort to implement an e-mail archiving initiative. The Magic Quadrant focuses on enterprise-class software products (not on service offerings) that met the criteria defined below, and that were able to prove, through their references, the ability to address the needs of an organization looking to support an environment with over 1,000 users. While there are many products that can support environments with smaller numbers of users, organizations with limited requirements or a modest number of users may want to start with one of these products, knowing that they will eventually need the scalability and functionality the products provide. Products that are too new to the market to have the required number of enterprise production references, or that are geography-specific, focused on small environments, or provide only a tactical solution to an immediate problem are excluded from this Magic Quadrant.

As the vendors covered in this year's Magic Quadrant have gained more customers, they have strengthened their understanding of market requirements and have responded with new features while extending existing features. Most vendors have stable code for the basic features that allow for full capture of all messages and for mailbox management. They seek to differentiate themselves with better discovery, administrative tools, and expanded device and content support. Several have added support for archiving user files, and a few also offer SharePoint archiving. Only a few product vendors focus on the unique compliance supervision requirements of large financial institutions with hundreds of regulated dealers, but that market is relatively small and saturated, compared with the broader market that requires mailbox management and legal discovery support. Vendors must have the ability to support the broader market requirements to be included in this Magic Quadrant.

Although many vendors have made significant improvements to their products, there are still many areas of concern, not the least of which is the complexity of deploying and managing growing archives. Migrating personal e-mail stores into the archive continues to be a pain point in the quality of the available tools and in the time it takes to accomplish the archiving. As the archives grow, the indexes and metadata generated for the content also grow. The time to create those indexes for clients receiving large volumes of messages on a daily basis, plus the time it takes to search them, continues to be a key concern.

Gartner

The biggest roadblock for customers is in defining their own requirements. Waiting for legal departments and the business units to agree on a corporate messaging policy and defining detailed retention rules often delay the selection and implementation process. An effective e-mail management policy is essential for organizations in today's litigious environment. However, companies need to begin archiving now to gain the operational benefits and to centralize data, so that when the policy is finalized and the retention rules are defined, the implementation can be adjusted to quickly respond. In the absence of a formal policy, implement at least the current de facto policy or get management to set a temporary policy pending a final position.
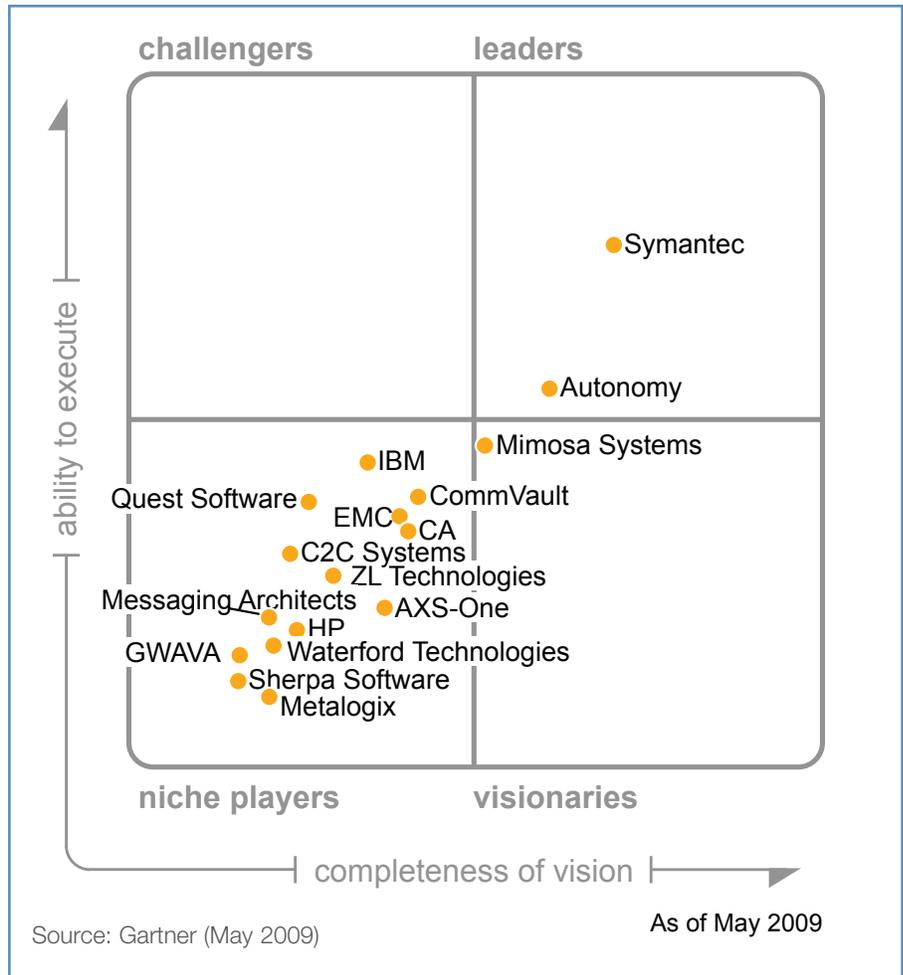
MAGIC QUADRANT

Do not compare the placement of vendors from last year to this year. The market has changed, and the ranking of vendors against the new requirements will impact the placement. Vendors that did not adapt will naturally move to the left on Completeness of Vision. Vendors that have not yet delivered proven solutions to the new market requirements measured per the defined criteria for this year's Magic Quadrant may also have moved to the left on Completeness of Vision. This does not imply that the products evaluated last year are now deficient. It just means that new requirements have provided new challenges that the vendor has yet to meet.

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

Figure 1. Magic Quadrant for E-Mail Active Archiving

Source: Gartner (May 2009)

As of May 2009

Shaping Gartner's view regarding proper vendor placement are more than 1,000 conversations over the past year with Gartner customers, as part of our inquiry service, survey responses and updates from the vendors in the March/April 2009 time frame, and over 70 conversations with vendor-supplied references in March and April 2009. We learn from these conversations not only why a client is choosing or has chosen a specific vendor, but why it did not choose other vendors that were on its shortlist. We also learn about experiences running the product in production environments, and how effective the vendors are in responding to client issues. Increasingly, we are learning about why a company is choosing to replace an existing vendor with a new vendor

solution. Prior to publication, each vendor has the opportunity to look at its placement on the Magic Quadrant and the strengths and challenges listed, and to respond to any factual errors.

It is important to remember that the Magic Quadrant does not just rate product quality or capabilities. While the product is an important part of the rating, the vendor's ability to capture customers and expand its presence in the market and to grow product and service revenue is also important. A vendor that builds a strong product but is unable or unwilling to also invest in marketing and sales to capture a growing base of customers will find itself unable to invest in future development.

Market Overview

The growing size of e-mail data stores, coupled with the requirement to retain e-mail records for regulatory compliance and legal discovery, has created a market for e-mail active-archiving tools. An e-mail active-archiving product provides a searchable archive of all e-mail messages for a defined period of time. It can be used independently or as part of a corporate records repository for legal and business uses. It also can be used as a way to reduce the size of production e-mail data stores to gain operational efficiencies (reduce backup time, improve recovery and eliminate the need for quotas while still keeping the active data store lean). This research focuses on the market for products. Some companies may decide to outsource their e-mail archiving requirements to a service provider, and the options available have continued to expand and have become more robust .

Vendors in this research have proved their products to be enterprise-class. Gartner is, however, tracking many new vendors entering the market or extending their solutions to better support larger enterprises or penetrate new geographies. Most will enter with solutions that provide basic capture and search. Some are focused on the e-discovery part of the market, but provide basic message archiving.

Market Definition/Description

As defined by Gartner, the e-mail active-archiving market targets vendors that not only provide for the capture of e-mail messages, but also use that archive to allow for the purging of messages from the active mail data store while giving the end user the illusion of an infinite mailbox. E-mail active-archiving products should:

- Capture and archive all or selected e-mail messages entering and leaving the company, and messages between users on an e-mail server as unique, indexed records. Single-instance storage (SIS) technology will be used to efficiently store the messages and the attachments in the archive.

- Provide access to the archive via a Web client and through the e-mail client.

- Include auditing capabilities to track access to archived records.

- Support the secure storage of increasingly large archives offering multiple storage options for the archive, including disk, optical and tape. Special-purpose content storage devices are also gaining traction, initially with the financial community that requires tamper-proof storage, but increasingly for industries that store very large files, such as the medical and broadcasting sectors, as well as organizations with very large volumes of files.

- Exploit stubbing or linking technology along with a policy engine to automatically prune the active e-mail data store for more-efficient operations. They also provide a way to remove the stubs as they age, providing users an alternative tool if access is needed.

- Offer personal data store migration tools and temporary offline local store options to eliminate the storage of e-mail messages outside the control of the archive system.

- Provide or integrate with a robust records management solution to manage the life cycle of the records to ensure proper retention and deletion.

Leading vendors:

- Package tools for sampling and management of the compliance supervision process for regulated broker-dealers.

- Package or integrate with tools to manage the discovery process, narrowing the search and managing the steps needed to deliver records. Leading products offer more than just search and packaging, but also provide tools for review and case management. Discovery tools are fast becoming a requirement to play in the enterprise part of the market. Robust search, review and export features are not only required, but are the focus for most scalability concerns. Although some vendors also offer more-comprehensive solutions that include case management and smarter metadata classification capabilities, many archiving vendors are partnering with e-discovery vendors to provide multiple options.

- Leading vendors will offer an integrated archiving solution that will include the archiving of other content such as user files and historical SharePoint documents.

Inclusion and Exclusion Criteria

To be included in the 2009 Magic Quadrant, a vendor must be the developer of the product and not just a reseller or value-added reseller (VAR). The company should have a growing base of customers and at least five enterprise (1,000 mailboxes or more) customers that are using the software in a production environment for mailbox management and compliance archiving, and that are able to be referenced to Gartner to support compliance with the criteria. Included vendors are worldwide in scope and industry-independent.

Vendors will have briefed Gartner on their product, and will have provided the required references prior to the end of 2008 to be qualified for inclusion in the 2009 Magic Quadrant.

Added

GWAVA, Metalogix and Sherpa Software have been added.

Dropped

Open Text was dropped from this year's Magic Quadrant. The company continues to offer its e-mail management and archiving solutions, but mainly as an element of its Open Text ECM Suite.

Evaluation Criteria

Ability to Execute

Ability to Execute criteria are:

- **Product:** An evaluation of the features and functions of the vendor's e-mail archiving solution. Higher ratings were assigned to solutions with strong archive architectures, policy-based archiving and mailbox management features, e-discovery and retention management capabilities, integration with other e-discovery and ECM solutions and support for file and SharePoint archiving.

- **Overall Viability:** Viability includes an assessment of the vendor's overall financial health, the financial and practical success of the e-mail archiving business unit, and the likelihood of the individual business unit to continue to invest in an e-mail archiving solution.

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

- **Market Responsiveness and Track Record:** Ability to respond, change direction and be flexible as market dynamics vary. This criterion also considers the vendor's history of responsiveness.

- **Marketing Execution:** This criterion assesses the effectiveness of the vendor's marketing programs, and its ability to create awareness and "mind share" in the market. It assesses whether the messaging was clear, whether the vendor provided references that used the unique features of the product in its target environment, and whether the promotion of the product on the company Web site was effective.

- **Customer Experience:** Quality of the customer experience, based on reference calls and Gartner client teleconferences.

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

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	High
Overall Viability (Business Unit, Financial, Strategy, Organization)	Standard
Sales Execution/Pricing	Standard
Market Responsiveness and Track Record	Standard
Marketing Execution	High
Customer Experience	High
Operations	Low
Source: Gartner (May 2009)	

Completeness of Vision

Completeness of Vision criteria are:

- **Market Understanding:** Ability of the vendor to understand buyers' needs and translate these needs into the appropriate features in their e-mail archiving product. 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:** A clear set of messages that positions the product and differentiates it from competitors, consistently communicated throughout the organization and externalized through the Web site, advertising, customer programs and positioning statements.

- **Sales Strategy:** The vendor's strategy for selling to its target audience, including an analysis of the appropriate mix of direct and indirect sales channels.

- **Offering (Product) Strategy:** An evaluation of the vendor's strategic product direction, including an analysis of its road map.

- **Vertical/Industry Strategy:** The vendor's strategy for meeting the specific needs of individual vertical markets and market segments (for example, financial industry-regulated employee supervision, or state and local government information retention and disclosure requirements).

- **Innovation:** This criterion includes product leadership and the ability to deliver archiving features and functions that distinguish the vendor from its competitors.

- **Geographic Strategy:** The vendor's strategy for penetrating geographies outside its home or native market.

A vendor's completeness of vision is evaluated based on its ability to convincingly articulate its future product direction and demonstrate innovation in meeting customer needs, enabling the vendor to more effectively compete in the market. The credibility of a vendor's vision is weighed against its past ability to execute against previously stated plans. Market understanding should be the guiding factor in new product development to ensure that the engineered product meets customer needs. Managing the complexity of storage environments requires innovative approaches that will distinguish leaders and delight customers (see Table 2).

Leaders

Leaders have the highest combined measures of an ability to execute and a completeness of vision. They have the most-comprehensive and most-scalable products. They have a proven track record of financial performance and established market presence. In terms of vision, they are perceived as thought leaders, with well-articulated plans for ease of use, how to address scalability and product breadth. For vendors to have long-term success, they must plan to address the expanded market requirements for archive management, personal store migration, ease of use and deployment, and archive recovery.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	Standard
Marketing Strategy	High
Sales Strategy	High
Offering (Product) Strategy	High
Business Model	No Rating
Vertical/Industry Strategy	Low
Innovation	Standard
Geographic Strategy	Standard
Source: Gartner (May 2009)	

Leaders must not only deliver to current market requirements, which continue to change, but they also need to anticipate and begin to deliver on future requirements. A cornerstone for leaders is the ability to articulate how these requirements will be addressed as part of their vision for expanded archive management. As a group, leaders can be expected to be considered as part of most new purchase proposals, and to have high success rates in winning new business.

Challengers

Challengers can execute today, but have a limited or evolving vision. They have capable products and can perform well for many enterprises. These vendors have the financial and market resources and capabilities to become leaders, but the important question is whether they have the understanding of market trends and market requirements needed to succeed in the future. They may not devote sufficient development resources to deliver products with broad market appeal and leadership features. There are no vendors in the Challengers quadrant this year.

Visionaries

Visionaries are forward-thinking, but their execution has not propelled them into a leadership position. These vendors are differentiated by product innovation, but they have not achieved completeness of solution or the sales and marketing success required to give them the high visibility of leaders.

Niche Players

Niche players are narrowly focused on an application, market or product mix, or they offer broad capabilities without the relative success of competitors in other quadrants. Niche players may focus on a segment of the market and do it well, or they may simply have modest horizons and lower overall capabilities compared with competitors. Others are simply too new to the market or have fallen behind and, although worth watching, they have not yet developed complete functionality or the ability to execute. The niche quadrant is the most interesting this year, as there are both emerging vendors in this quadrant that truly address market niches and also vendors that should be leaders, but are still struggling to get the right mix of product and go-to-market activities.

Vendor Strengths and Cautions

Autonomy

Autonomy targets the high end of the enterprise market that is looking to manage complex information management and discovery requirements. It is integrating the archiving solutions from its 2007 acquisition of Zantaz with the rest of its portfolio, which now covers all aspects of the discovery market: information management (Zantaz archiving and Meridio records management), identification, preservation and collection (Aungate Legal Hold), processing, review, analysis and production (Introspect and Aungate Investigator and ECA). New customer acquisition was strong, but less percentage wise than the previous year, as the company focused on larger organizations. Although this Magic Quadrant's main focus is on the product side of the market, Autonomy's archiving service is playing a more active role as more companies are starting to leverage its EAS OnDemand solution, which couples on-site archiving with outsourced services for long-term management of data.

Strengths

• Autonomy is a large, public company with a history of profitability.

• The company has a growing base of references using the archive product as part of a broader discovery management solution.

Cautions

• Autonomy is most supportive of companies looking for an overall information management and litigation solution that includes archiving.

• Customers who purchased EAS from a VAR may find reduced support as Autonomy reduces the number of resellers, resulting in some resellers shifting their expertise to other products.

AXS-One

AXS-One was founded in 1978 under the name Computron to provide financial software. An early visionary in the archiving market, the company has been able to capture some very large customers, but not enough to gain market leadership or profitability, allowing competitors time to deliver more competitive solutions. On 16 April 2009, Unify (NASDAQ: UNFY), a global provider of application development, database and migration products, announced an agreement to acquire AXS-One. The acquisition is expected to close by July 2009.

Strengths

- AXS-One is one of the few companies with production references with over 100,000 users.

- The Compliance Platform is an integrated content archiving solution with modules for retention management, legal discovery, case management/legal hold and supervision to manage not only e-mail (Lotus Notes, Exchange, Sun Java System Messaging Server and Internet mail systems), but also desktop and shared server user files and SAP documents and data.

Cautions

- The approach to e-mail stubbing results in the removal of the attachment icon for Outlook users, which has caused some user resistance to automated mailbox management.

- AXS-One experienced good revenue growth in 2008, but it captured few new customers.

C2C Systems

C2C Archive One for Exchange includes mailbox capacity management and archiving per policy, compliance capture for store of all e-mail, and e-discovery in "live" mail stores, PSTs and in the archive. The company has extended its Archive One support beyond Exchange to support Domino and SharePoint. Support for archiving Files is in limited release.

Strengths

- C2C Systems' Archive One solution often wins over competitors because of its broad range of functionality at a modest price. Further reducing the cost is that there is no requirement to license or support Microsoft SQL.

- Its discovery tool can search active e-mail messages, public folders and .pst files, and the archive product provides a single set of management tools for active and archived e-mail and files across Exchange, Domino, SharePoint and Files.

Cautions

- While the company has customers using the product with more than 5,000 users, its average customer size, and the bulk of its references, are much smaller.

- Although customers report that administrative search is good, tools for user search of the archive are slow, and the user folder structure is not visible in the archive, resulting in user resistance to stub removal after a defined period of time. C2C has a new version in limited release that addresses some of these concerns, but this new version is not yet generally available.

CA

The CA Message Manager now includes a new Discovery and Retention Manager module, which serves as a common component shared with CA Records Manager, providing a unified view and common feature set between the two product lines to help manage key aspects of the e-discovery and retention management process. The federated search capability provides enterprise-side searching across multiple content sources such as Microsoft SharePoint, CA Records Manager and CA Message Manager archives, as well as Windows- and Unix-based file systems, workstations and desktops. A SharePoint connecter is included to allow SharePoint data to be moved to the archive. CA Message Manager supports Exchange, Domino, GroupWise and SMTP-based mail platforms, such as Sun ONE Messaging Server.

Strengths

- CA Message Manager is one of the few products that supports prereview supervision.

- The acquisition of Orchestria in 2008 adds classification, supervision and data loss prevention technology to the suite.

Cautions

- While support by CA for the Message Manager product is improving, customers report that phone response can be too slow, and may require the customer to insist on escalation. Expertise for Domino installations has also been limited.

- CA File System Manager is a product CA resells from another vendor. Prospects should call references and review the product road map prior to making a purchase decision.

CommVault

CommVault's Simpana is built on a common technology engine that serves as the single platform for both data protection and archiving. The Simpana Data Archiver product supports archiving of Exchange, Lotus Domino, File and SharePoint files. CommVault Simpana Search (often referred to as Content Indexing) offers advanced indexing and search for both backup and archived data. Although this product offers legal hold capabilities, there is also another product, Content Director, which provides for more-sophisticated, policy-based content classification and automated legal hold.

Strengths

- The common technology engine across the data protection and archive functions provides a common platform that has gained the strongest adoption by CommVault Simpana backup and recovery customers.

- When both backup and archiving solutions are deployed, use of the platform's data deduplication engine allows backup datasets and archive datasets to be pooled into a single repository with only one copy of a file, an e-mail or a document.

Cautions

- Due to the multiple components of Simpana to address the needs of the data protection and archiving markets, and the way these are presented, it is often difficult to determine what is a product and what is a feature on the Web site. This complexity can make it difficult to determine if CommVault is an appropriate vendor for a given user's shortlist.

- The Simpana 8 software platform has extensive new features, few of which were being used by reference customers. Request references from customers that are similar in size and are using the software features that you plan to use, or perform a diligent pilot evaluation.

EMC

At the beginning of April 2009, EMC announced EMC SourceOne, a suite of products that includes a new e-mail archiving offering, EMC SourceOne Email Management, that should be viewed as the next generation of its EmailXtender product. EMC plans to evolve the SourceOne Suite to include more content types and additional management capabilities. Today, the portfolio consists of SourceOne Email Management for Exchange and IBM Lotus Notes Domino for journal or policy-based e-mail and instant-message archiving, SourceOne Discovery Manager for discovery and legal hold of SourceOne Email Management archive data, and SourceOne Discovery Collector, which leverages indexing appliances to automate collection of live data. EMC SourceOne Email Management and Discovery Manager can search both SourceOne Email Management and EmailXtender archives.

Strengths

- The SourceOne product suite was designed for a worldwide market (full Unicode support, localized into seven languages), and to address the scalability and usability issues identified by EmailXtender customers.

- EMC has worldwide sales and support, and the ability to deliver software and storage as part of an overall solution.

Cautions

- The EMC SourceOne products are version one products with extensive new code that will need some time in production environments to be fully tested.

- Organizations will need to buy the e-discovery module to export search results.

GWAVA

GWAVA entered into the e-mail archiving market at the end of 2007 when it released the Retain solution for GroupWise archiving. Other related solutions available from GWAVA include Reveal, a desktop tool for accessing other user mailboxes for management review, Redline for GroupWise reporting and monitoring, and Reload for GroupWise backup. Retain for BlackBerry Enterprise Server provides for the archiving of Short Message Service (SMS), PIN messages and phone usage data.

Strengths

- The archiving software can run on a Linux server which is appealing to customers using Novell Open Enterprise Server (OES) or other Linux platforms and don't want to use Windows (the product also runs on Windows).

- GWAVA has a large base of customers for its other GroupWise products. The promotion of its new archiving solution to its existing customer base is why it was able report such a fast start in 2008.

Cautions

- GWAVA Retain for GroupWise has only been in the market for a short period of time, and few references were using much more than the capture and store capabilities of the product at this point.

- Most installations are for 5,000 and fewer users, so larger users should test scalability to understand the infrastructure required to support the application.

HP

HP Email Archiving is specifically designed as an application connector for and runs exclusively on the HP Integrated Archive Platform (IAP) archiving appliance. There are connectors for Exchange, IBM Domino and Files. With the July 2008 release of the IAP software, access to the full 2.1 terabyte (TB) capacity of the Universal Smart Storage Cells, the storage and compute building blocks for the appliance, is now available. Updates to the Exchange support include archiving of calendar items, folder preservation within the archive and support of use of quotas as an archive policy tool.

Strengths

- The appliance approach that integrates servers, storage and software provides for a tightly integrated solution that is easy to deploy.

- Search response is fast, and considered a product strength by customers.

Cautions

- The software provides limited discovery capability beyond search and legal hold without requiring the purchase of a third-party e-discovery solution.

- Files can be archived into the same repository as e-mail, but there is no single instancing across e-mail and files.

- Product support often requires escalation to the engineering team because of limited expertise in HP's support group.

IBM

In October 2008, IBM released a new e-mail archiving solution, IBM Content Collector (ICC) for Email. The ICC platform consists of a core engine surrounded by source connectors which support multiple content sources (such as e-mail, SharePoint and files) and target connectors, which support multiple content repositories (such as IBM Content Manager or IBM FileNet P8), and Task Connectors, which support a wide variety of tasks and integration capabilities. Other modules include IBM Records Manager, IBM Classification Module, and eDiscovery Manager and Analyzer. ICC for Email will eventually replace IBM CommonStore for Exchange and Domino, and the IBM FileNet Email Manager products, though none of these products has been retired at this point.

Strengths

- For organizations looking to manage active and historical content by leveraging a common set of tools that integrates active and historical data under a common content management architecture, the IBM approach will be appealing.

- IBM has an installed base of over 14,000 content management customers who, along with new content management prospects, will be the first target for this new offering.

Cautions

- Customers with large CommonStore archives may need to stay with that solution until scalability is confirmed, and until all functionality, device and platform support is available in ICC.

- ICC for Email is newly released, and early adopters have not deployed and tested all the commonly required functionality, especially around mailbox management and user access tools.

Messaging Architects

Messaging Architects M+Archive supports the Novell GroupWise e-mail market, but rearchitected its archive platform to allow for the addition of new content types, with the first being message capture for Exchange. Basic discovery capabilities are included with the product, and an export facility is provided to copy data for presentation to an external party. The solution is integrated with Novell eDirectory to support centralized identity management. Archive data can be moved to different tiers of storage, including tape, as the data ages. SIS is available for Exchange and GroupWise 8 attachments.

Strengths

- Messaging Architects has strong knowledge and support for the GroupWise environment, and its archiving solution has been in production at customer sites for over seven years, giving it time to mature.

- The company's products are easy to install and use, and have a strong presence in state and local government, and education.

Cautions

- Acquisition of new customers and, thus, revenue growth slowed in 2008, as more competitors entered the market and as GroupWise users continued to migrate to Exchange where competition is even greater.

- The archive software runs on Windows, which requires users who may only have NetWare or Linux running in their computer centers to bring in a Windows server and all the supporting management software.

Metalogix

Metalogix acquired the archiving software from H&S Software in September 2008. H&S AG is now a reseller for Metalogix solutions in Europe, and Sunbelt Software is a major reseller in the U.S. Professional Archive Manager (PAM) for Exchange (formerly known as exchange@PAM). Supports policy-based archiving, as well as full capture. Data managed by the company's other offerings, PAM for files and PAM for SharePoint, can be stored in the same repository as e-mail, leveraging the SIS capability across all content types. The number of customer using all three products is still very small at this point.

Strengths

- Metadata is stored in a database, with e-mails stored in the company's own hierarchical storage management (HSM) system, which can write to two stores at once to create not only the archive, but also a backup copy.

- The product has a large number of mostly smaller customers in Europe, but was gaining traction in the U.S. at the time of the Metalogix acquisition.

Cautions

- The new company has been slow to establish its new brand, and appears to still be in organizational mode. Gain assurance from reselling partners as to their ability to support the product long term.

- The largest part of the customer base supports under 500 mailboxes, and larger references are still only using basic product features.

Mimosa Systems

Mimosa Systems' NearPoint for Exchange combines e-mail archiving and continuous data protection. The NearPoint eDiscovery Option is an add-on option to provide a search capability, legal hold, and support for litigation and internal investigations. The NearPoint File System Archive (FSA) option provides for the collection of active files located on file shares, desktops and laptops that meet preservation requirements as part of a legal matter. A new Retention and Classification Option

provides for automatic classification and tagging of messages to mark messages of special interest or those that need to be retained. Through newer modules, user files and SharePoint documents can also be added to the archive, and a content monitoring module provides for supervising for inappropriate content or violations of corporate policies.

Strengths

• Organizations that do not want to turn on Microsoft journaling but still want to capture all messages have found Mimosa's NearPoint Email Archiving product an effective option.

• The near-continuous data protection and recovery features integral to the product are a bonus that users who bought it only for archiving find that they also can use.

Cautions

• Installations with over 5,000 users may require multiple archive servers to better handle the large index that results from the amount of metadata collected by the capture approach.

• Sales and support resources outside North America are expanding, but all channels need to deliver aggressively in 2009 if Mimosa is to grow market share against the expanding list of worldwide competitors.

Quest Software

Quest Archive Manager supports Microsoft Exchange and Novell GroupWise for compliance capture and mailbox management archiving. The solution is complemented by other Quest management tools, including its Recovery Manager for Exchange, a tool for extracting messages from backup tapes, and its GroupWise and Lotus to Exchange migration tools. In addition, Quest Policy Authority for Unified Communication (from the August 2008 Akonix acquisition) adds archiving of instant messages, SMS and BlackBerry PIN to PIN messages. In May 2009, Quest announced e-Discovery Manager, its new solution for scoping, collecting, reviewing and exporting electronically stored information. The product adds review, processing and analysis capabilities for production Exchange systems, messages in backup copies of the Exchange database and messages in the Archive Manager repository.

Strengths

• Customers report that Quest Software's Archive Manager is easy to deploy and use, and that they particularly like the user Web interface.

• The product can support GroupWise users before, during and after the move to Exchange.

• The company has worldwide sales and support, and a particularly strong reseller channel. The user interface has been localized into French, German and Japanese.

Cautions

• The company is late with discovery and file archiving support.

• Prospects looking to support more than 15,000 users should seek references or thoroughly test for scalability and multiple archive support before committing to the product.

Sherpa Software

Sherpa Software Archive Attender for Exchange supports the typical approach to archiving based on journal capture or policy-based archiving. Through integrations with Sherpa's Mail Attender product, organizations can define more-advanced archive policies based on the message content. Attachments and messages are stored together in the archive in zipped MSG file format. SIS support was added in March 2008. Legal hold is accomplished by copying the message to a separate location for each case. The company plans to integrate its archiving product with its Discovery Attender file investigation offering, which will then enable search of active and archive data together, and will eliminate duplicates.

Strengths

• Sherpa's product offers ease of installation and deployment at a low cost.

• An OEM agreement with Azaleos has provided a sales boost and valuable product feedback.

Cautions

• To move more solidly into the enterprise space, Sherpa will need to improve product performance and continue to enrich the feature set.

• The company is small and has limited resources, which could be a problem for larger companies with special support or product requirements.

Symantec

Symantec Enterprise Vault has evolved into an integrated content archiving platform with the largest worldwide base of e-mail archiving customers and a large, fast-growing base for its file and SharePoint archiving solutions. It also archives instant messaging, and integrates with other archiving products and leading records management and discovery products. Symantec has a balanced approach to the market, with strong marketing, sales and customer service, and a product that has continued to evolve. Version 8.0, released at the beginning of 2009, addressed some of the design issues that were threatening to slow its growth. The new features strengthened its ability to sell into the small or midsize business (SMB) market by adding ease of use features, while its improved discovery and archive architecture addresses the needs of larger, more complex environments.

Strengths

- Symantec's Enterprise Vault e-mail archiving solution continues to benefit from the large development and quality assurance team to deliver enhancements for archiving, e-discovery and compliance supervision.

- A strong partner and application programming interface (API) program has nurtured an ecosystem of solutions that integrates with the offering to extend Enterprise Vault in the areas of management, content collection and e-discovery.

Cautions

- Compliance Accelerator should be carefully reviewed to see that it meets the organization's requirements as delivered.

- The breadth of Enterprise Vault e-mail archiving product can overwhelm smaller organizations that need only a subset of the features.

Waterford Technologies

Waterford Technologies MailMeter Archive provides archiving for Exchange, Domino, Ipswitch and SLMail Pro e-mail systems. The company targets midmarket customers (50 to 5,000 mailboxes) looking for an easy-to-deploy solution that can provide e-mail reporting and legal investigation capabilities. A compliance module, MailMeter Compliance Review, provides for message review. The company also offers MailMeter Investigate, its legal discovery tool. MailMeter File Archiver was first released in Ireland, but became generally available at the end of 2008. The newest version, released in 2009, is targeted to improve performance and scalability to support larger archiving environments.

Strengths

- Waterford Technologies' MailMeter references support the company's claims of ease of deployment and management for both e-mail and file archiving.

- The company has predefined reports that meet target customer requirements.

Cautions

- Scalability beyond 5,000 users still needs improvement, and larger prospects should carefully test the products as part of the evaluation process.

- Auditing of access to the archive is limited, and prospects should review MailMeter to ensure that it is enough to meet their requirements.

ZL Technologies

ZL Technologies targets its ZL Unified Archive solution at companies with over 10,000 employees. The product can archive e-mail and files, supporting Exchange, Lotus Notes, Sun Java Message Server and Internet mail systems, and is being sold directly and through channel partners, including Oracle, which sells it under the name Oracle E-mail Archive Service. ZL Unified Archive offers add-on modules for message supervision and to support e-discovery. The partitioned search supports fast access to data in very large archive repositories. In 2008, the Case Management module was expanded and renamed ZL UA zDiscovery Manager. The ability to allow end users to access the journal created archive without exposing blind copy recipients was also added.

Strengths

- Although the company has a small number of clients, it has large deployments with customers that are happy with product features, scalability and efficient use of infrastructure resources.

- The archive stores e-mail and files in the same repository, taking advantage of SIS and allowing its e-discovery module to manage both types of content.

Cautions

- For ZL to become more successful in the market, the company needs to invest more in marketing, and to aggressively expand its sales channels to capture more customers.

- The bulk of the company sales are in North America and Japan.

Vendors Added or Dropped

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

Evaluation Criteria Definitions

Ability to Execute

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

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

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

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

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

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

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

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen 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 Web site, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services, and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.