Vendor Landscape: Content and Email Archiving

Archiving is not just for email anymore.

INFO~TECH
RESEARCH GROUP

Introduction

Using archiving products to meet compliance needs and reducing the impact of content growth on primary storage are concerns for all organizations.

This Research Is Designed For:

✓ IT professionals involved in evaluating, selecting, and deploying archiving solutions.

✓ IT professionals responsible for email platform efficiency and supporting end-user email restoration requests.

✓ Compliance managers responsible for eDiscovery of emails and placing legal holds on email.

This Research Will Help You:

✓ Determine if you need a third-party archiving product.

✓ Build an archive program.

✓ Evaluate email archiving vendors and products for your enterprise needs.

✓ Determine which products are most appropriate for particular use cases and scenarios, and implement the selected platform.

Executive Summary

Info-Tech evaluated 11 competitors in the archiving market, including the following notable performers:

Champions:

- **OpenText** provides a robust archive platform plus a wider set of traditional ECM features.
- **Commvault** has one of most balanced products with tools for both eDiscovery and storage management.
- **Global Relay:** The holistic communication governance and archive features that Global Relay provides are key for any industry.
- **GWAVA** provides complete archiving and has an email security gateway product.
- **Smarsh** provides a flexible solution with highly granular controls

Value:

- **GWAVA:** The most complete product at its price point.

Trend Setter Award:

- **Smarsh:** The introduction of the development platform and its simple yet powerful UI put Smarsh ahead of the landscape in design.

Info-Tech Insight

1. **This is no longer about just email.**

   The market is changing to meet the greater archive needs that larger organizations require today. Most products can archive from social or file shares in addition to email and IM.

2. **Cost is a real differentiator.**

   This is a Vendor Landscape where there is a tight connection between the number of features and the cost of the product.

3. **The identification of archives as indicators of social networks.**

   Vendors are realizing the very real potential of email as a value add for knowledge management and collaboration.

Market Overview

How it got here

- The archive market has recently refocused to information governance (access control) and information management (cost control) due to Gmail and Office 365 providing table stakes level archiving.
- The high adoption of cloud email (including managed service providers) has reduced the traditional storage management use case for **email only** archiving.
- The content explosion brought about by web 2.0 tools and expanded regulatory oversight has put pressure on organizations to control and audit corporate-owned information sources.
- The increased need for sophisticated compliance tools such as search and sampling requires high quality indexed storage.

Where it's going

- As cloud productivity becomes the norm, look for archiving vendors to expand to include information rights management as a key tool.
- The "disk is cheap" mentality will require an integrated set of storage and information management tools to control content growth. This will be a key differentiator for archive products moving forward.
- As archiving moves from an Exchange control product to part of a content management strategy, it will continue to expand the features that are offered.
- Content analytics that are used to group documents and emails based on specific terms will become mainstream knowledge management tools.

Info-Tech Insight

As the market evolves, capabilities that were once cutting edge become default and new functionality becomes differentiating. Exchange archiving has become a Table Stakes capability and should no longer be used to differentiate solutions. Instead focus on hierarchical storage management and full text-based search to get the best fit for your requirements.

These vendors were included due to consideration of their market share, mind share, and platform coverage

Vendors included in this report provide a comprehensive, innovative, and functional solution for managing information through retention rules and eDiscovery.

Included in this Vendor Landscape:

Barracuda: Long-time provider of email services is expanding beyond messaging to include multiple content types.

Commvault: The Simpana products are widely used as part of the archive and storage platform.

Jatheon: Solid vendor focused on real-time information management rights management.

Global Relay: Serves as the Message Archiving Vendor in FINRA's compliance resource provider program.

GWAVA: Provides an email-focused management platform that includes email archiving as well as security.

OpenText: Global leader in enterprise information management, provides a single platform for all information sources.

MessageSolution: On-premise or cloud-based vendor that provides archive and basic eDiscovery.

Mimecast: Cloud SaaS company that provides archiving capabilities for a variety of communication types.

Sonian: Cloud SaaS provider with a wide set of content types that can be archived.

Symantec: A major player in back-up, security, and discovery markets.

Smarsh: Provides compliance and governance across email, social, and web for highly regulated enterprises.

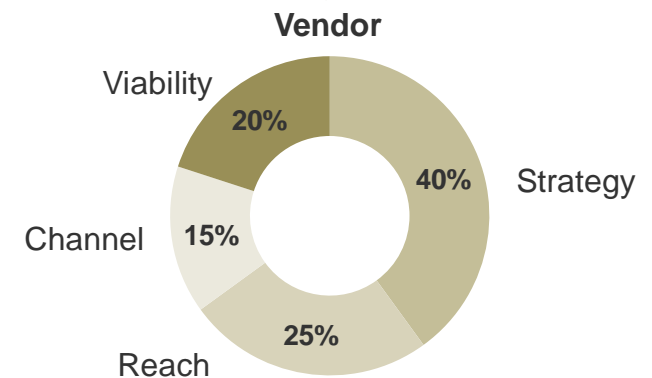# Content and email archive criteria & weighting factors

Product Evaluation Criteria

Features	The solution provides basic and advanced feature/functionality.
Usability	The end-user and administrative interfaces are intuitive and offer streamlined workflow.
Affordability	Implementing and operating the solution is affordable given the technology.
Architecture	Multiple deployment options and extensive integration capabilities are available.

Vendor Evaluation Criteria

Viability	Vendor is profitable, knowledgeable, and will be around for the long term.
Strategy	Vendor is committed to the space and has a future product and portfolio roadmap.
Reach	Vendor offers global coverage and is able to sell and provide post-sales support.
Channel	Vendor channel strategy is appropriate and the channels themselves are strong.

Criteria Weighting:

Product
- Features 40%
- Usability 25%
- Affordability 10%
- Architecture 25%

Vendor
- 60%
- 40%

- Viability 20%
- Strategy 40%
- Reach 25%
- Channel 15%
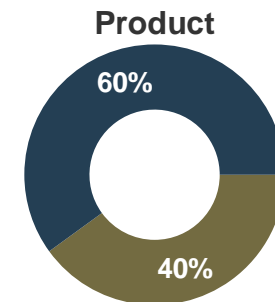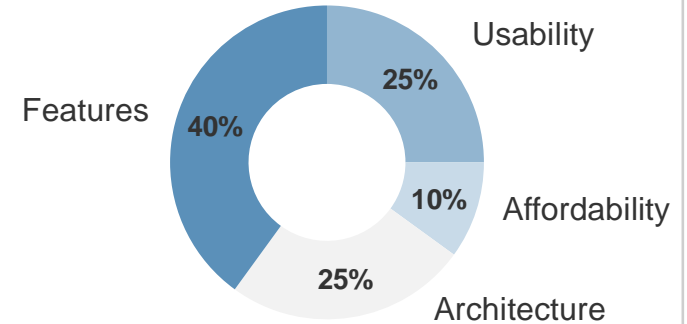
The Info-Tech Content and Email Archive Vendor Landscape

The Zones of the Landscape

Champions receive high scores for most evaluation criteria and offer excellent value. They have a strong market presence and are usually the trend setters for the industry.

Market Pillars are established players with very strong vendor credentials, but with more average product scores.

Innovators have demonstrated innovative product strengths that act as their competitive advantage in appealing to niche segments of the market.

Emerging Players are comparatively newer vendors who are starting to gain a foothold in the marketplace. They balance product and vendor attributes, though score lower relative to market Champions.

The Info-Tech Archiving Vendor Landscape:
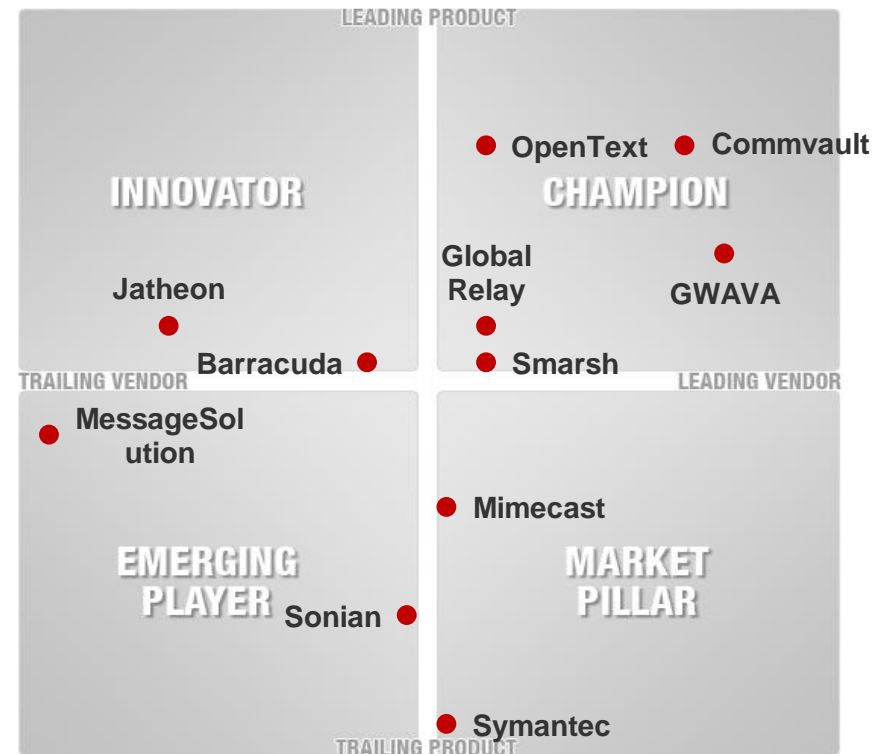
For an explanation of how the Info-Tech Vendor Landscape is created, see Information Presentation – Vendor Landscape in the Appendix.

Focus on these vendors if you require an on-premise system; balance individual strengths to find your best fit

	Product					Vendor				
	Overall	Features	Usability	Afford.	Arch.	Overall	Viability	Strategy	Reach	Channel
Barracuda	Adequate	Inadequate	Good	Good	Good	Good	Exemplary	Adequate	Good	Adequate
Commvault	Good	Good	Exemplary	Inadequate	Good	Good	Good	Good	Exemplary	Exemplary
Jatheon	Adequate	Adequate	Good	Adequate	Good	Adequate	Good	Good	Inadequate	Inadequate
Global Relay	Adequate	Adequate	Exemplary	Adequate	Good	Good	Good	Good	Exemplary	Adequate
GWAVA	Good	Adequate	Good	Exemplary	Adequate	Exemplary	Good	Good	Exemplary	Exemplary
OpenText*	Good	Exemplary	Good	Poor	Good	Good	Exemplary	Adequate	Inadequate	Adequate
Message-Solution*	Adequate	Adequate	Good	Poor	Adequate	Adequate	Inadequate	Inadequate	Good	Inadequate

Legend: ● =Exemplary ◕ =Good ◑ =Adequate ◔ =Inadequate ○ =Poor

*The vendor declined to provide pricing and publicly available pricing could not be found

For an explanation of how the Info-Tech Harvey Balls are calculated, see Information Presentation – Criteria Scores (Harvey Balls) in the Appendix.

Focus on these vendors if you are looking to off-load management

	Product					Vendor				
	Overall	Features	Usability	Afford.	Arch.	Overall	Viability	Strategy	Reach	Channel
Mimecast	Adequate	Poor	Good	Exemplary	Adequate	Good	Exemplary	Adequate	Exemplary	Good
Sonian	Adequate	Poor	Good	Good	Adequate	Good	Good	Adequate	Good	Exemplary
Symantec*	Good	Inadequate	Adequate	Poor	Adequate	Good	Good	Good	Exemplary	Good
Smarsh	Adequate	Adequate	Exemplary	Inadequate	Good	Good	Good	Good	Good	Adequate

Legend ● =Exemplary ◕ =Good ◑ =Adequate ◔ =Inadequate ○ =Poor

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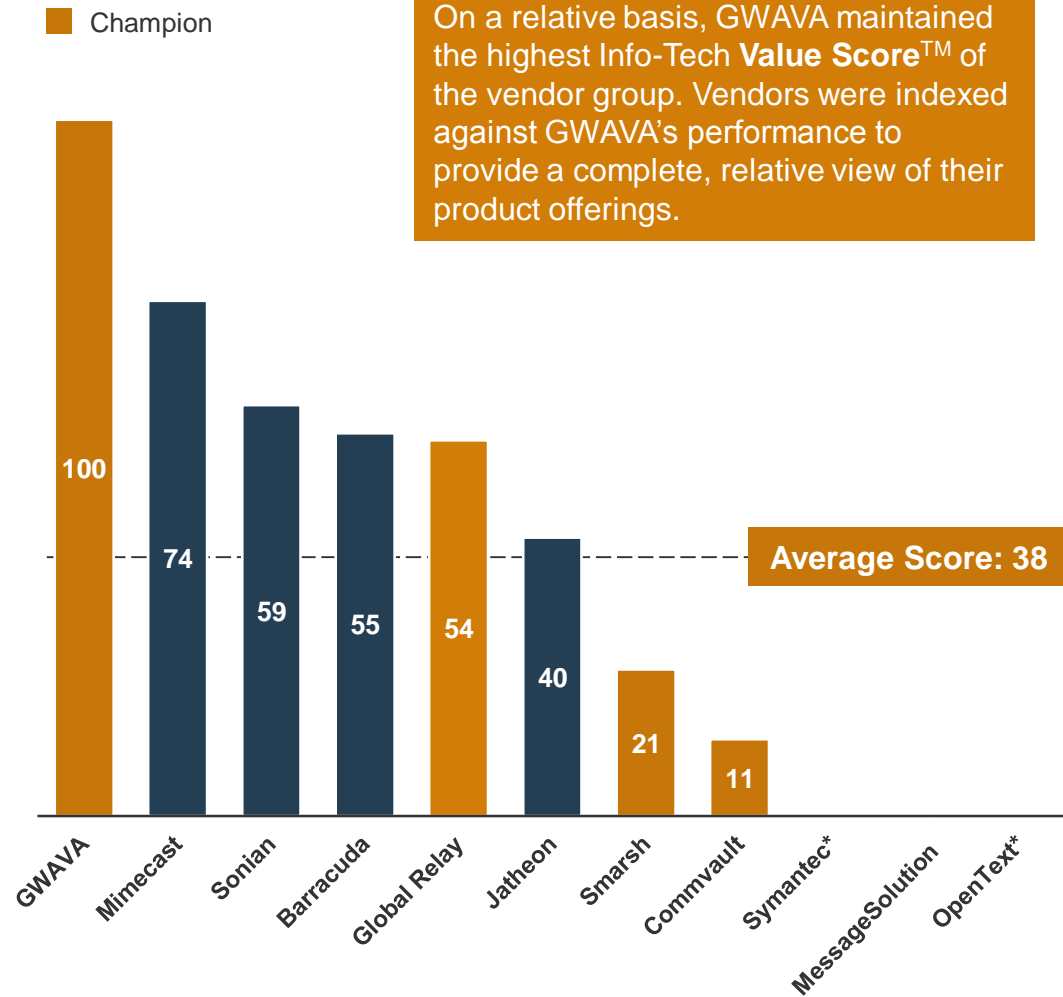# The Info-Tech Content and Email Archiving Value Index

What is a Value Score?

The Value Score indexes each vendor's product offering and business strength **relative to their price point.** It **does not** indicate vendor ranking.

Vendors that score high offer more **bang-for-the-buck** (e.g. features, usability, stability, etc.) than the average vendor, while the inverse is true for those that score lower.

Price-conscious enterprises may wish to give the Value Score more consideration than those who are more focused on specific vendor/product attributes.

*The vendor declined to provide pricing and publicly available pricing could not be found

■ Champion

On a relative basis, GWAVA maintained the highest Info-Tech **Value Score**™ of the vendor group. Vendors were indexed against GWAVA's performance to provide a complete, relative view of their product offerings.

Average Score: 38

Vendor	Score
GWAVA	100
Mimecast	74
Sonian	59
Barracuda	55
Global Relay	54
Jatheon	40
Smarsh	21
Commvault	11
Symantec*	
MessageSolution	
OpenText*	

For an explanation of how Price is determined, see Information Presentation – Price Evaluation in the Appendix.

For an explanation of how the Info-Tech Value Index is calculated, see Information Presentation – Value Index in the Appendix.

Table Stakes represent the minimum standard; without these, a product doesn't even get reviewed

The Table Stakes

Feature	What it is:
Exchange archiving	Journaling and the option to delete email from the database for Exchange on-premise.
Full email search	The ability to search email content, based on using full text search as well as MIME fields.
Additional content types	All products in this landscape have current or near-term products for at least social content.

What Does This Mean?

The products assessed in this Vendor Landscape™ meet, at the very least, the requirements outlined as Table Stakes.

Many of the vendors go above and beyond the outlined Table Stakes, some even do so in multiple categories. This section aims to highlight the products' capabilities **in excess** of the criteria listed here.

Info-Tech Insight

If Table Stakes are all you need from your content and email archive solution, focus on the email archive use-case scenario.

Advanced Features are the capabilities that allow for granular market differentiation

Scoring Methodology

Info-Tech scored each vendor's features offering as a summation of its individual scores across the listed advanced features. Vendors were given one point for each feature the product inherently provided.

All categories were scored based on the additive score of partial features that when combined present the complete advanced feature.

Advanced Features

Feature	What we looked for:
Complete file archiving	The ability to intelligently archive additional file types such as fileshares, social, and SharePoint.
Storage Management	Ability to manage additional off-site storage locations as part of the archive storage.
eDiscovery management	A portal that can be used by Compliance team to own and perform all aspects of eDiscovery.
Auto-classification	Granular control of email and content to control duplicates and access during eDiscovery.
File classification inheritance	The ability to take advantage of pre-existing metadata from standard metadata types.
Advanced search	The ability to perform full text search as part of a larger search-based ranking.
Application integration	The ability to enable a consolidated archive for typical applications (CRM, ECM, ERP, WCM).
Storage location control	The ability to tie the physical storage media to the age/value of the archive materials.
Content analytics	The incorporation of analytics of the archived content.
Structured data	The ability archive structured databases. The index-able data search using database fields.

For an explanation of how Advanced Features are determined, see Information Presentation – Feature Ranks (Stoplights) in the Appendix.

Focus on these vendors if you require an on-premise system; balance individual strengths to find your best fit

	Evaluated Features									
	Complete archiving	Storage mgmt.	eDiscovery	Auto-class.	Class. inheritance	Advanced search	Application integration	Storage location control	Content analytics	Structured data
Barracuda	🟡	🟢	🔴	🟡	🔴	🟢	🔴	🟢	🟡	🔴
Commvault	🟢	🟢	🟢	🟢	🟡	🟢	🟢	🟡	🟡	🟡
Jatheon	🟡	🟢	🟢	🟢	🔴	🟢	🟡	🟡	🟢	🔴
Global Relay	🟢	🔴	🟢	🟢	🔴	🟢	🔴	🟡	🟢	🔴
GWAVA	🟡	🟡	🟢	🟢	🔴	🟢	🟢	🟡	🟢	🔴
OpenText	🟢	🟡	🟢	🟢	🟢	🟢	🟢	🟡	🟢	🟢
Message-Solution	🟡	🟡	🟢	🟡	🟡	🟢	🟡	🟢	🟢	🔴

Legend 🟢 =Feature fully present 🟡 =Feature partially present/pending 🔴 =Feature absent

For an explanation of how Advanced Features are determined, see Information Presentation – Feature Ranks (Stoplights) in the Appendix.

Focus on these vendors if you are looking to off-load management

Evaluated Features									
Complete archiving	Storage mgmt.	eDiscovery	Auto-class.	Class. inheritance	Advanced search	Application integration	Storage location control	Content analytics	Structured data

Mimecast — partially present (Complete archiving), absent (Storage mgmt.), partially present (eDiscovery), partially present (Auto-class.), absent (Class. inheritance), partially present (Advanced search), absent (Application integration), absent (Storage location control), absent (Content analytics), absent (Structured data)

Sonian — partially present (Complete archiving), absent (Storage mgmt.), fully present (eDiscovery), absent (Auto-class.), absent (Class. inheritance), fully present (Advanced search), absent (Application integration), absent (Storage location control), absent (Content analytics), absent (Structured data)

Symantec — fully present (Complete archiving), partially present (Storage mgmt.), partially present (eDiscovery), absent (Auto-class.), absent (Class. inheritance), absent (Advanced search), absent (Application integration), absent (Storage location control), partially present (Content analytics), absent (Structured data)

Smarsh — fully present (Complete archiving), absent (Storage mgmt.), fully present (eDiscovery), partially present (Auto-class.), absent (Class. inheritance), fully present (Advanced search), partially present (Application integration), absent (Storage location control), fully present (Content analytics), absent (Structured data)

Legend — 🟢 =Feature fully present   🟡 =Feature partially present/pending   🔴 =Feature absent

For an explanation of how Advanced Features are determined, see Information Presentation – Feature Ranks (Stoplights) in the Appendix.

Email is still the dominant information source. These products focus on email and are priced appropriately

Organizations using Lotus or Groupwise have less options for full archiving. See vendors' second slide for those that have journaling capabilities.

1 **Email archiving**

2

3

4

Why Scenarios?

In reviewing the products included in each Vendor Landscape™, certain use cases come to the forefront. Whether those use cases are defined by applicability in certain locations, relevance for certain industries, or as strengths in delivering a specific capability, Info-Tech recognizes those use cases as Scenarios, and calls attention to them where they exist.

Lotus Notes

OPENTEXT smarsh globalRELAY

JATHEON GUARANTEE

Groupwise

GWAVA MessageSolution — Enterprise Archiving, eDiscovery, Migration smarsh

globalRELAY JATHEON GUARANTEE

For an explanation of how Scenarios are determined, see Information Presentation – Scenarios in the Appendix.

High growth rate industries need tools that are focused on separating and disposing of low value content

The value of these products is their ability to automate disposition.

1

2 Storage control

3

4

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The starting point

COMMVAULT

Commvault provides a wide set of tools focused on storage management. These allow clients to appropriately store information based on its use and value to the organization.

Symantec

Symantec provides one of the most robust platforms for control of storage across on-premise systems.

Barracuda

The de-duplication and single instance storage provide very good tools for controlling the growth of attachments.

For an explanation of how Scenarios are determined, see Information Presentation – Scenarios in the Appendix.

If you perform transactions through email, websites, or ECM, you need to manage the change from communication to record

Information can quickly change from file to record; these products handle those situations.

1

2

3 **Records management**

4

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Email disposition

smarsh   GWAVA.   globalRELAY.

OPENTEXT

SharePoint and file share cleaning

OPENTEXT   COMMVAULT

Website archiving

smarsh   JATHEON GUARANTEE

For an explanation of how Scenarios are determined, see Information Presentation – Scenarios in the Appendix.

The fit of compliance tools needs to meet the key concerns

Discovery comes in many different flavors; pick the product that best meets your discovery needs.

1
2
3

4 eDiscovery

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Regular or high volume requests

globalRELAY.   smarsh   JATHEON GUARANTEE

File and email aggregation

OPENTEXT   Symantec™

Control of attachment versioning

COMMVAULT

For an explanation of how Scenarios are determined, see Information Presentation – Scenarios in the Appendix.

OpenText brings a complete information management platform to the archive landscape
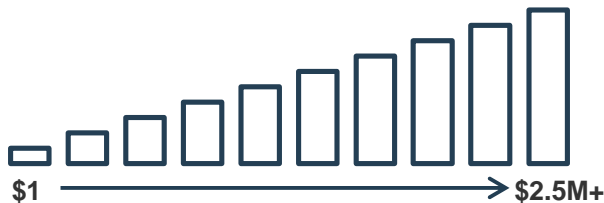
Champion

Product: Content Suite Platform
Employees: 8,500
Headquarters: Waterloo, ON
Website: opentext.com
Founded: 1991
Presence: NASDAQ: OTEX; TSX: OTC

OPENTEXT

The vendor declined to provide pricing, and publicly available pricing could not be found

$1 ———————→ $2.5M+

Overview

- OpenText is a premium enterprise information management platform.
- Content Server has long contained archive functionality, and this archive module is now a standalone archive product.

Strengths

- Most comprehensive solution in the landscape due largely to the traditional content management strengths of the vendor.
- Content Server provides a wide set of archive and compliance tools to reduce the storage and risk profile of information.
- A wide set of deployment and management settings to deal with complex data sovereignty and compliance issues.
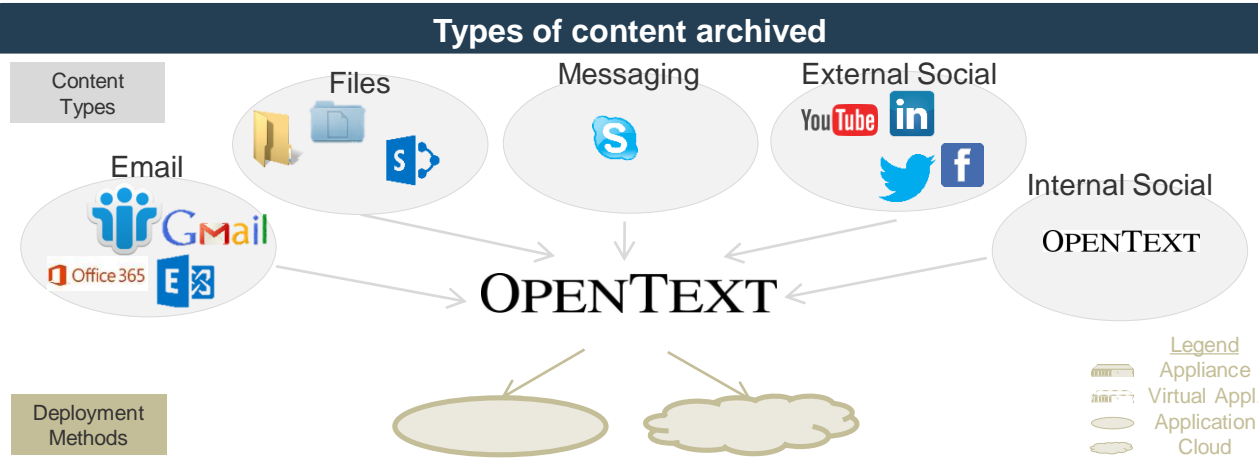
Challenges

- The biggest challenge will be for mid-size organizations with a lean IT structure to learn and maintain the on-premise archive.
- Full value of the OpenText platform requires a mature information governance strategy.

OpenText provides holistic archive and records management

Vendor Landscape

INNOVATOR CHAMPION

EMERGING PLAYER MARKET PILLAR

LEADING PRODUCT

TRAILING VENDOR LEADING VENDOR

TRAILING PRODUCT

Value Index

N/A

The vendor declined to provide pricing, and publicly available pricing could not be found

Product

Overall	Features	Usability	Afford.	Arch.
◔	●	◑	○	◑

Vendor

Overall	Viability	Strategy	Reach	Channel
◔	●	◑	◔	◑

Types of content archived

Content Types

Files

Messaging

External Social

Email

Internal Social

OPENTEXT

OPENTEXT

Deployment Methods

Legend
- Appliance
- Virtual Appl.
- Application
- Cloud

Features

Complete file archiving	Storage management	eDiscovery management	Auto-classification	Classification inheritance	Advanced search	Application integration	Storage loc. control	Content analytics	Structured data
🟢	🟡	🟢	🟢	🟢	🟢	🟢	🟡	🟢	🟢

Info-Tech Recommends:

Large enterprises should include OpenText and evaluate their need for a single EIM platform.