Magic Quadrant for Enterprise Information Archiving

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By Analyst(s): Michael Hoeck, Jeff Vogel, Chandra Mukhyala

Initiatives: Data Center Infrastructure; Legal and Compliance Technology and Analytics

> The rapid adoption and growth of digital communication tools and application data requires a reassessment of corporate and regulatory compliance capabilities. I&O leaders should use this research to evaluate enterprise information archiving vendors and their ability to address these requirements.

This Magic Quadrant is related to other research:

Critical Capabilities for Enterprise Information Archiving

View All Magic Quadrants and Critical Capabilities

Strategic Planning Assumptions

By 2025, 45% of regulated enterprise customers will conduct supervision of audio/video content to meet compliance requirements, up from less than 10% in 2021.

By 2025, 35% of enterprise customers will archive workstream collaboration and meeting solutions for nonregulated requirements, an increase of more than sevenfold from 2021.

Market Definition/Description

Enterprise information archiving (EIA) solutions are designed for archiving data sources to a centralized platform to satisfy information governance requirements, including regulatory and/or corporate governance and privacy; improve data accessibility; surface new data insights; and gain operational efficiencies.
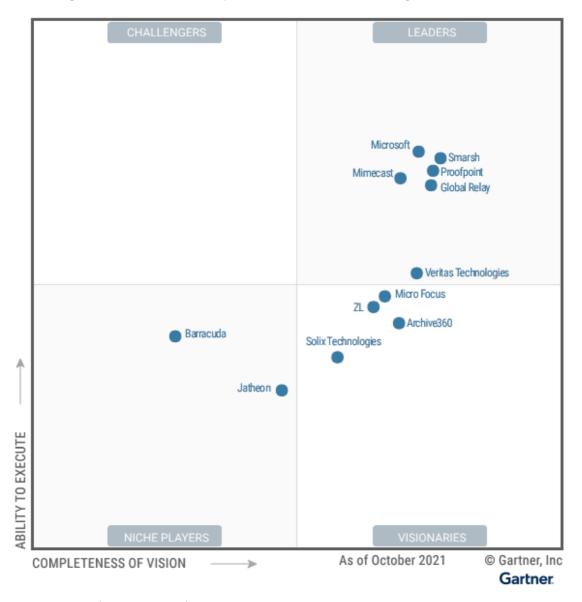
There are several core capabilities of this market. They include archiving digital communication content, such as email, workstream collaboration, instant messaging (IM) and SMS; classifying data and enabling retention management of archive content; creating a searchable index of content; and providing basic tools for e-discovery and supervision.

Many optional capabilities for this market further a customer's ability to manage, classify and discover additional data. These include archiving other digital communication such as social media, meeting solutions, voice, audio and industry-specific communication tools; archiving application/user data such as file systems, cloud office, content collaboration tools, content platform services, relational databases and website content; enhancing e-discovery capabilities to manage multiple discovery/audit events; advancing supervision capabilities to apply surveillance to multiple digital communication content types and providing real-time compliance feedback to end users; conducting in-place search, e-discovery and retention management without requirement to archive data; applying artificial intelligence and machine learning (AI/ML) capabilities to further enrich data such as automating classification and extracting sentiment analysis, and improving accuracy and operational efficiencies across multiple use cases; providing records management capabilities, including file plan management and record declaration; applying data reduction across content types; an open API architecture to advance data access to specialized analytics and e-discovery tools; and migration tools that move existing archives to new archive platforms.

The solutions vary by vendor and may be provided as an on-premises or cloud-deployed software product or appliance, a SaaS/platform as a service (PaaS) offering, or a combination.

Magic Quadrant

Figure 1: Magic Quadrant for Enterprise Information Archiving

Source: Gartner (January 2022)

Vendor Strengths and Cautions

Archive360

Archive360 is a Visionary in this Magic Quadrant. Archive2Azure was released in November 2016 on Microsoft Azure as a platform as a service (PaaS) offering that runs in a customer's tenant. Archive360's solution is designed to manage multiple data sources. It operates across all major geographies, and its customers tend to be large enterprises in financial services, government and healthcare. During the past 12 months, Archive360 added support for all MS Teams data types, Slack and content services platforms (CSPs); a new records management module; and dynamic workflow creation based on AI-classified data and events. Archive360 is best-suited for digital communications and application/user data archiving for regulatory compliance, supervision, records management and e-discovery.

Strengths

- Archive360's scope of data sources, including CSPs and the introduction of formal records management features, has resonated with highly regulated industry customers, including financial services, government and healthcare.

- Archive360 has advanced its data migration services with an "over the wire" feature to accelerate the transition from a customer's existing archive.

- Archive360's solution has established a strong resilience record, having reported no customer outages in the last 24 months.

Cautions

- Archive360 customers have primary responsibility to monitor, manage and support Azure infrastructure for use with Archive360 marketplace software, unless managed services are arranged.

- Archive360's offering lacks support for archiving instant message sources such as WhatsApp, WeChat and BlackBerry.

- Archive360's e-discovery module's native integration with major third-party e-discovery tools is incomplete, and may require use of common export and Electronic Discovery Reference Model (EDRM) manifest output.

Barracuda

Barracuda is a Niche Player in this Magic Quadrant. Barracuda Message Archiver, Barracuda Cloud Archiving Service and Barracuda View Archiving offer appliance- and SaaS-based archiving options. Message Archiver was first released in 2007. Barracuda solutions are designed for ease of use, and support archive and search use cases. The vendor's operations are globally focused, and clients tend to be small and midsize businesses (SMBs), and midsize enterprises (MSEs) in manufacturing, education and government. During the past 12 months, Barracuda has updated its MS Outlook add-in and its MS Exchange integration using Microsoft Exchange Web Services (EWS). Barracuda is best-suited for email archiving for corporate compliance, operational efficiency and end-user archiving.

Strengths

- Gartner customers report a high regard for Barracuda's end-user interface for its ease of use and minimal IT team assistance.

- Barracuda's Cloud Archiving Service licensing model is simplified, including all available product features, unlimited retention and no added cost for storage.

- Customers are deploying Barracuda's archiving solution as part of a bundled purchase to satisfy a broader set of email management requirements, including backup, continuity and security.

Cautions

- Barracuda does not provide support to archive major workstream collaboration platforms such as MS Teams and Slack.

- Barracuda lacks features such as AI/ML and specialized tools for e-discovery and supervision/surveillance, which does not align well with large enterprise customers or complex regulatory requirements.

- Barracuda has among the lowest percentage of company revenue toward EIA research and development relative to most vendors in this Magic Quadrant.

Global Relay

Global Relay is a Leader in this Magic Quadrant. Global Relay Archive is a private cloud, SaaS-based offering first released in 2000. Global Relay's EIA solution is designed for many digital communication and trade data sources. Its operations focus mainly on North America and Europe, and its clients tend to be financial services and government. During the past 12 months, Global Relay added a new connector framework, enhanced support for Refinitiv trade tickets, and voice calls and recordings; and an end-user feedback loop to retrain embedded AI models. Global Relay is best-suited to highly regulated compliance, trade reconstruction, advanced supervision, e-discovery and specialized use cases for text and voice capture.

Strengths

- Global Relay's content type support is enhanced with its new Open Connector Framework, providing a consistent data structure for all supported content types, and preserving formatting and original metadata.

- Global Relay has introduced its own embedded AI/ML throughout the offering to improve performance and accuracy of data classification, e-discovery and supervision.

- Global Relay Virtual Phone offers a dedicated mobile application for compliant text messaging, voice calls, recording and archiving to separate business and personal communications.

Cautions

- Global Relay data export fees may be incurred as part of normal operational use and at the end of contract, dependent on license type and agreed-upon terms at the start of contract.

- Global Relay lacks a local field organization outside of North America and Europe, which could impact overall customer experience in other regions.

- Global Relay's use of its own AI Studio to build and deploy AI models is restricted to Global Relay data scientists and not accessible to clients.

Jatheon

Jatheon is a Niche Player in this Magic Quadrant. Jatheon Cloud Archive is a public cloud, SaaS-based offering first released in 2018. Jatheon Archiving Suite offers appliance-based deployment options and was first released in 2004. Jatheon solutions primarily focus on digital communication sources. Its operations mainly focus on North America and Europe, and its clients tend to be education and government. During the past 12 months, Jatheon added a new e-discovery solution to group searches, audit logs, notes and keyword list; WhatsApp archiving service; sentiment analysis and enhanced archiving of Facebook pages; and end-user search. Jatheon is best-suited for archiving email and social media for corporate compliance and e-discovery use cases.

Strengths

- Jatheon's all-inclusive pricing for its archive offering includes all available features, such as e-discovery, no-cost appliance upgrades and migration of legacy data from competitor systems.

- Jatheon's focus on email and social media archiving and supported e-discovery features resonates among state and local government and education customers.

- Jatheon's 24/7 proactive monitoring and support mitigates customer impact and accelerates time to resolution.

Cautions

- Jatheon's limited supervision capabilities and lack of support for archiving workstream collaboration solutions, such as MS Teams and Slack, and services, such as Bloomberg, Thomson Reuters and Symphony, limit consideration by financial service industry customers.

- Jatheon's recent shift in business model and product strategy may result in feature and operational inconsistencies between its appliance and native cloud offerings.

- Gartner clients report Jatheon's on-premises appliance offering lacks the ease-of-use features found in its cloud offering.

Micro Focus

Micro Focus is a Visionary in this Magic Quadrant. Micro Focus Digital Safe is a private, public or hybrid cloud SaaS archive solution that was released in 1998. Micro Focus Retain is a software-based, on-premises offering that was first released in 2004. The two solutions support a variety of digital communication and user/application-generated content. The vendor operates worldwide, and its clients are largely in the financial services, legal and government industries. During the past 12 months, Micro Focus has added faceted search, interactive term hits, and updated supervision user experience and MS Teams integration including deletion support. Micro Focus is best-suited to highly regulated and complex organizations that require advanced e-discovery and supervision.

Strengths

- Micro Focus has integrated its IDOL product throughout the Digital Safe offering to provide a comprehensive set of analytics and AI/ML features to classify data and improve e-discovery and supervision efforts and results.

- Micro Focus' addition of Digital Safe Foundations provides a more predictable and cost-effective offering for a narrower set of requirements in the financial services industry.

- Micro Focus has released multiple updates to e-discovery and supervision to improve user experience and reporting capabilities.

Cautions

- Gartner clients have expressed concerns with Digital Safe's lack of predictable pricing due to its complex monthly licensing based on multivariate factors.

- Micro Focus lacks a FedRAMP-authorized solution, which may limit consideration and use among government and education customers.

- Digital Safe offers limited support for workstream collaboration and meeting solution archiving, lacking integration with Webex Teams, Webex Meetings, GoToMeeting, Jive and HCL Sametime.

Microsoft

Microsoft is a Leader in this Magic Quadrant. Microsoft's archiving solution is built on the Microsoft 365 SaaS platform, and it was released in October 2015. Microsoft's EIA solution is designed for a variety of digital communication and user/application-generated data sources. It operates worldwide, and its clients tend to be MSEs to large enterprises across multiple vertical industries. During the past 12 months, Microsoft has added expanded support to multiple sources outside of Microsoft 365; Compliance Manager customer-focused assessments; and the ability to collect and review encrypted content from SharePoint and OneDrive. Microsoft is best-suited for in-place archiving, records management, regulatory compliance, e-discovery and end-user archiving.

Strengths

- Microsoft's advanced compliance and e-discovery solutions offered as bundles to existing M3/E3 licensed customers and inclusion in M5/E5 have contributed to adoption of its technology across multiple industries.

- Microsoft has expanded the scope of its archive offering for data outside of Microsoft 365 by adding multiple content source integrations, such as Slack, WhatsApp, Facebook, Bloomberg SMS, Webex and Zoom, through native and third-party connectors.

- Microsoft Compliance Manager provides a distinct feature to assess a customer's alignment to common industry and regional standards and regulations.

Cautions

- Microsoft's intention to bundle features, support and license incentives may increase total cost of licensing ownership.

- Microsoft e-discovery solutions require users to be placed on hold to provide a comprehensive view and full discoverability of user content.

- Licensing for add-on premium template options in Compliance Manager can be complex, operationally awkward to create and track, and expensive depending on actual use/purpose.

Mimecast

Mimecast is a Leader in this Magic Quadrant. Mimecast Cloud Archive is a private cloud SaaS solution that was first released in 2004. Mimecast's EIA solution is principally designed for digital communication data sources. Its operations are primarily focused on North America and Europe, and its clients tend to be MSEs in financial services, manufacturing, legal and healthcare. During the past 12 months, Mimecast has added the following features: native archive and backup of MS Teams, new e-discovery review categories and search criteria, and new supervision advanced lexicons with Boolean search. Mimecast is best-suited to digital communications archiving for regulatory compliance, supervision, e-discovery and end-user archiving.

Strengths

- Mimecast's archiving offering is widely adopted by its customers as an extension of other Mimecast offerings such as email security, continuity and backup/recovery.

- Gartner clients consistently report a positive customer experience using the Mimecast Cloud Archive solution.

- Mimecast provides well-defined performance expectations for end-user and e-discovery searches within its service-level agreement (SLA).

Cautions

- Mimecast lacks a full spectrum of AI/ML features, capabilities and integration to its archive, e-discovery and supervision offerings.

- Mimecast's archive platform strategy may require customers to evaluate their ability to conform to local client data requirements.

- Mimecast Cloud Archive lacks native support for MS OneDrive and SharePoint Online.

Proofpoint

Proofpoint is a Leader in this Magic Quadrant. Proofpoint Enterprise Archive is a SaaS solution that runs on private cloud infrastructure. It was released in 2008. Proofpoint's EIA solution is designed for a variety of digital communication data sources. The vendor operates mostly in North America and Europe, and its clients tend to be large enterprises in financial services, healthcare and government. During the past 12 months, Proofpoint has added native archive support for MS Teams and Zoom In-Meeting chat, targeted capture of content from MS Teams and Slack, and machine learning models for supervision. Proofpoint is best-suited to digital communications archiving for regulatory compliance, advanced supervision and e-discovery.

Strengths

- Proofpoint's archive offering has been adopted by many of its security customers, resulting in deployment in and support of multiple industries.

- Proofpoint's addition of its in-house-built NexusAI for Compliance offering adds AI/ML to its supervision solution to eliminate false positives from a reviewer's queue.

- Proofpoint's archive provides a common user and administrative interface controlled by role-based access that simplifies user experience and support.

Cautions

- Multiple geography deployments of Proofpoint's archiving solution are not integrated into a single management console, which could impede global administration and centralized access.

- Proofpoint's global data center infrastructure growth initiative into new geographies with public cloud providers in support of growing data volumes may incur higher costs.

- Gartner clients express pricing concerns related to licensing storage capacity based on retention policy length and existing data migrated to Proofpoint Enterprise Archive.

Smarsh

Smarsh is a Leader in this Magic Quadrant. Entering the market in 2003, Smarsh's SaaS-based archive offerings include Enterprise Archive, a public cloud solution, Professional Archive, a hybrid private/public cloud solution and Federal Archive, a FedRamp-authorized solution. Smarsh supports multiple digital communication data sources. It operates mainly in North America and Europe, and its clients tend to be midsize-to-large enterprises in financial services and government. During the past 12 months, Smarsh has added voice archiving for MS Teams, RingCentral and Zoom, and a cloud-native capture platform. Smarsh is best-suited for digital communications archiving for regulatory compliance, advanced supervision and e-discovery.

Strengths

- Smarsh's business model is designed and optimized to deliver a broad set of pricing options and features to address a wide range of market demands.

- The acquisition of Digital Reasoning expands Smarsh's offering with new specialized solutions utilizing natural language processing (NLP) and machine learning for conduct surveillance and healthcare automation.

- Smarsh's Professional Archive solution is now available as a multicloud offering, extending its infrastructure from private cloud to the AWS platform.

Cautions

- Smarsh's Enterprise Archive and Professional Archive use of AI/ML from its acquisition of Digital Reasoning is in the roadmap and integration stages for future planned releases.

- Smarsh Enterprise Archive lacks automated classification of emails based on metadata, body and/or attachment content.

- Smarsh Enterprise Archive has yet to implement optical character recognition (OCR) to extract and search text from scanned PDF documents.

Solix Technologies

Solix Technologies is a Visionary in this Magic Quadrant. Solix Common Data Platform, first released in 2016, can be deployed on-premises and in public cloud IaaS and SaaS environments. Solix Technologies' EIA solution archives a variety of digital communication and user/application-generated data sources. The vendor operates mainly in North America and Europe, and its clients tend to be large enterprises in manufacturing, financial services and healthcare. During the past 12 months, Solix Technologies has added enhanced security integrating with identity access management (IAM), enhanced data validations and updated data privacy reflecting new regulations. Solix Technologies is best-suited for application/user-generated data archiving for regulatory compliance and e-discovery.

Strengths

- Solix's focus on structured data archiving is now complemented with its more recent support for digital communications to provide a single archive for a wider variety of data sources.

- SOLIXCloud, a managed service offering, provides a multicloud-managed solution for structured and unstructured information and content.

- Solix's open-architecture design provides the ability to interact with archived data using multiple third-party analytics tools such as Tableau, PowerBI and Qlik.

Cautions

- Solix's data center strategy may restrict adoption of its multitenant SaaS offering in geographies outside of North America and Europe.

- Solix Common Data Platform's lack of support for archiving instant messages and industry-specific communication tools such as Bloomberg and Refinitiv limits its consideration by financial services customers.

- Solix Common Data Platform lacks specialized modules for e-discovery and supervision/surveillance critical capabilities.

Veritas Technologies

Veritas Technologies is a Leader in this Magic Quadrant. Veritas Enterprise Vault, first released in 1998, is available on-premises, as private cloud and as SaaS. Veritas offers an EIA solution designed for multiple data sources. It operates worldwide, and its clients tend to be MSE-to-large enterprises in financial services, government and manufacturing. During the past 12 months, Veritas has added new supervision and e-discovery modules, targeted collection of Teams content, privileged delete of sensitive items, expanded classification policies, and legal hold enhancements. Veritas is best-suited for digital communications and application/user data archiving for regulatory compliance, e-discovery, supervision and end-user archiving.

Strengths

- Veritas has brought feature parity of Enterprise Vault with EV.cloud, providing customer choice and optionality for platform deployment.

- Veritas' acquisition of Globanet has significantly expanded its native connector support and strengthened its competitive archive migration capabilities.

- Veritas' portfolio of compliance offerings is addressing information governance requirements, such as file analysis, automated classification, archiving, supervision and e-discovery.

Cautions

- Veritas Enterprise Vault experienced a higher rate of reported critical issues requiring customers to take a more proactive role in system and application maintenance to mitigate potential issues.

- Veritas Enterprise Vault customers planning to use Advanced Discovery must copy custodian data from Enterprise Vault to EV.cloud for inclusion in e-discovery efforts.

- Veritas Enterprise Vault's shift to elastic indexing for better performance and resiliency is a work in progress.

ZL

ZL is a Visionary in this Magic Quadrant. ZL Unified Archive, first released in 1999, is a software solution for on-premises and a public cloud SaaS offering on MS Azure. ZL File Analysis and Management runs on MS Azure. ZL offers EIA solutions for digital communications and application/user-generated data sources. It operates mainly in North America, Japan and Europe, and its clients tend to be large enterprises in financial, manufacturing and healthcare. During the past 12 months, ZL has added support for MS Teams and Google Drive, echo reduction, and data management features for in-place search, preview, cull and visualization of MS 365 data. ZL is best-suited to in-place data management and archiving for compliance, e-discovery and supervision.

Strengths

- ZL provides in-field resources and a cloud data center strategy to support customers across all major geographies.

- ZL includes both archived and nonarchived data in its e-discovery workflow, with its in-place data management features to search, preview, cull and visualize MS 365 data without archiving.

- ZL Compliance Manager workflow enables a single message to be processed through multiple departments, with distinct reviewers, auditing, lexicons and retention policies.

Cautions

- ZL lags industry peer group leaders in number of customers and revenue growth in those industries where it is principally deployed. Prospective customers should consider ZL's ability to innovate at the rate of market demands.

- ZL requires enrollment in its Designated Support Program to gain 24/7 telephone support, whereas this is often included by other market vendors without an add-on program fee.

- A large percentage of ZL's overall customer base is concentrated in financial services, healthcare/medical/biotechnology, and manufacturing and technical industries. Prospective customers should consider ZL's ability to anticipate and support emerging needs in other industries.

Vendors Added and Dropped

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

Added:

- Jatheon

- Solix Technologies

Dropped

Everteam, a Kyocera Company, was dropped because it failed to meet the defined inclusion criteria, based on our assessment and data provided by the vendor.

Inclusion and Exclusion Criteria

To qualify for inclusion in this Magic Quadrant, vendors need to:

- Be a significant player, as determined by Gartner, in the market due to market presence, competitive visibility and/or technology innovation.

- Meet at least one of the following revenue criteria. Revenue must be derived solely from its archiving product portfolio. This revenue should not include revenue generated from implementation services and managed services:

  - Achieve greater than $25 million in EIA license or maintenance revenue (GAAP) during the last four quarters ending 31 May 2021 or

  - Achieve at least $12 million in EIA license and/or subscription revenue (GAAP) and a year-over-year growth rate of 50% during the last four quarters ending 31 May 2021.

- Sustain a minimum 5% annual growth of customer base, including at least 10 large enterprise customers (5,000 users or more) with active support contracts that are using the software in a production environment for digital communication data archiving. Examples include email, workstream collaboration, IM, SMS, audio and voice. At least five of those customers must also use the archive product for multiple digital communication content sources/types archiving.

- Have significant sales, support and/or operations in at least two geographic regions (North America, Europe or Asia/Pacific), and customers in at least three vertical markets and industries (such as financial services, healthcare, government, energy or manufacturing).

- Be the developer of the EIA product, and not only an OEM reseller or value-added reseller (VAR).

- Have released new product(s) or major updates to existing products in the last 12 months and made them generally available on or before 30 June 2021 to be considered for evaluation.

Magic Quadrant exclusion criteria:

- Products or solutions that are designed and mainly positioned as solutions for archiving a single content type.

Honorable Mentions

Gartner tracks more than 30 vendors in this market. Twelve met the inclusion criteria for this Magic Quadrant; however, the exclusion of a provider does not mean that the vendor and its products lack viability. Below are several noteworthy vendors that did not meet all inclusion criteria but could be appropriate for clients, contingent on requirements.

Aware: This SaaS-based archiving solution vendor is headquartered in Columbus, Ohio. Aware provides archiving, regulatory compliance and e-discovery for multiple digital communication sources targeted for use across all industries.

Bloomberg: This SaaS-based archiving solution vendor is headquartered in New York City, New York. Bloomberg Vault provides archiving, advanced regulatory compliance and e-discovery for a variety of digital communication sources targeted for use in the financial services industry.

Onna: This SaaS-based archiving vendor is headquartered in New York City, New York. Onna provides archiving and e-discovery for multiple digital communication sources targeted for use across all industries.

Theta Lake: This SaaS-based archiving vendor is headquartered in Santa Barbara, California. Theta Lake provides archiving, regulatory compliance and e-discovery for workstream collaboration, meeting solutions and video, for use across all industries.

Evaluation Criteria

Ability to Execute

Product/Service: This involves core goods and services that compete in and/or serve the defined market. This includes current product and service capabilities, quality, feature sets, skills, and more. The vendor must have developed the product, and not only be an OEM reseller or value-added reseller. Important characteristics include:

- An evaluation of the features and functions of the vendor's enterprise information archiving solution.

- Product must support integrated digital communications and one other archiving content type, such as file systems, cloud office or other application data.

- Must support the following capabilities:

    - Data reduction across multiple content types (e.g., deduplication, single-instance storage)

    - Common management across content types for supported features (e.g., policy management, user definition, retention management, e-discovery features)

    - Full-text indexing and search for all content types

- Roadmap should support plans for continued integration of multiple content types.

- Higher ratings are assessed for support for instant messages, text messages, video/audio, social media content and structured data (applications and databases). That is, support for these content types is optional, but considered favorably.

- Higher ratings are assigned to solutions with strong archive architectures, policy-based archiving, quality of user experience, advanced e-discovery and retention management capabilities, including use of artificial intelligence/machine learning.

- Severity 1 and Severity 2 bugs reported from the field in the last 12 months (as determined by the Magic Quadrant authors from customer inquiries, publicly available information and vendor responses).

- SaaS/PaaS SLAs and measurement of reported availability/outages.

Overall Viability: Viability includes an assessment of the organization's overall financial health as well as the financial and practical success of the business unit. Evaluates the likelihood of the organization to continue to offer and invest in the product, as well as the product position in the current portfolio. Important characteristics include:

- Continued growth in sales and product development staff.

- Visible investment in product roadmap and delivery of new capabilities.

- Overall financial health of the company.

- Demonstrate continued growth in archive license revenue.

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

- Clear explanation of solution sales strategies established to drive channel and end-user differentiation, and alignment to perceived market direction.

- Alignment of product offerings and pricing changes made to adapt to customer requirements.

- Distribution of sales across direct, VAR and OEM.

- Cost and effort to export data from archive during production and at end of contract.

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

- Demonstrate ability to expand customer base with new logos.

- Competitive strategy clearly defined in product roadmap with ability to adjust to market dynamics.

- Response to changes in the market to adapt product, marketing and sales as customer requirements evolve.

- Ability to deliver new features in alignment with the product roadmap timeline.

Marketing Execution: This involves the clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand, increase awareness of products and establish a positive identification in the minds of customers. This "mind share" can be driven by a combination of publicity, promotional, thought leadership, social media, referrals and sales activities. Important characteristics include:

- Innovative and thought-leading marketing campaigns aligned to new customer requirements and challenges.

- Consistency of participation at events targeting customers and prospects, with measurable results.

- Clear description of the value proposition that differentiates the vendor product and portfolio from the competition.

Customer Experience: Products and services and/or programs should enable customers to achieve anticipated results with the products evaluated. Specifically, this includes quality supplier/buyer interactions, technical support or account support. This may also include ancillary tools, customer support programs, the availability of user groups or service-level agreements, for example. Important characteristics include:

- Enablement of new initiatives or changes to operations to improve postsales customer support.

- Explanation of the tools, processes and people that are engaged to deliver proactive and preventative maintenance.

- Visibility to platform uptime through service status and notifications.

- Clear articulation of the distinct customer support capabilities and experiences over the competition.

Operations: Operations is the ability of the organization to meet goals and commitments. Factors include quality of the organizational structure, skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently. Important characteristics include:

- Continued investment in training new and existing employees.

- Certification attainment by employees related to supported industries and required technical skills.

- Investment in new operational platform tools.

Table 1: Ability to Execute Evaluation Criteria

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

Source: Gartner (January 2022)

Completeness of Vision

Market Understanding: This is the ability to understand customer needs and translate them into products and services. Vendors show a clear vision of their market — listen, understand customer demands, and can shape or enhance market changes with their added vision. Important characteristics include the ability to articulate:

- Key capabilities that an EIA product needs to win customer business in the current market (for example, the requirement to archive other content, to provide strong e-discovery capabilities, to provide analytics and/or leverage AI or ML technologies).

- Top challenges that customers face today and how EIA products address them.

- Top competitors and why they win or lose to them.

Marketing Strategy: Clear, differentiated messaging must be consistently communicated internally, and externalized through social media, advertising, customer programs, and positioning statements. Important characteristics include:

- Competitive marketing message to broad market capabilities, as well as uniqueness to specific market segments (e.g., highly regulated industry).

- Explanation of how each product is positioned to customers and how it derives value.

- Clear definition of marketing message to targeted personas and how messaging changes to each.

Sales Strategy: This involves a sound strategy for selling that uses the appropriate mix of networks including direct and indirect sales, marketing, service, and communications. Partners extend the scope and depth of market reach, expertise, technologies, services and their customer bases. Important characteristics include:

- Explain key elements of the sales strategy for EIA solutions.

- Highlight new strategies in the current year to improve sales effectiveness.

- Engagement of partner and channel resources in presales and postsales activities.

Offering (Product) Strategy: An approach to product development and delivery should emphasize market differentiation, functionality, methodology and features as they map to current and future requirements. Important characteristics include:

- Forward-looking perspective of critical features in the upcoming year.

- New and competitive innovations in product roadmap.

- Ability to introduce new features/products in a timely manner that aligns to customer priorities.

- Alignment of product delivery schedule to product roadmap.

- Extent of dependence on other independent software vendors (ISVs) for specific software functionality.

Business Model: This involves the design, logic and execution of the organization's business proposition to achieve continued success. Important characteristics include:

- Percentage of revenue reinvestment in research and development.

- Strategies used to sustain business growth in the long term despite external factors such as price fluctuations, technology obsolescence and new competition.

- Strategies to develop additional revenue from existing customers.

Vertical/Industry Strategy: This is the strategy to direct resources (e.g., sales, product, development), skills and products to meet the specific needs of individual market segments, including verticals. Important characteristics include:

- Deliver product capabilities to meet archiving and compliance requirements of regulated industries, such as financial services, healthcare and government.

- Align product roadmap to gain traction in new vertical markets.

- Target multiple regulated industries.

Innovation: This involves direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes. Important characteristics include:

- Ability to deliver new archiving features and functions that distinguish the vendor from its competitors.

- Visibility of critical features in the upcoming roadmap to remain competitive.

- Incorporation of innovation in the functional areas of the organization to achieve competitive differentiation.

- Continued growth in the market despite competitive pressures.

Geographic Strategy: This is 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. Important characteristics include:

- Broadening sales reach through hiring and/or partnerships.

- Partner sales and technical training programs.

- Marketing program alignment to target geographies and markets.

Table 2: Completeness of Vision Evaluation Criteria

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

Source: Gartner (January 2022)

Quadrant Descriptions

Leaders

Leaders have the highest combined measures of Ability to Execute and Completeness of Vision. They may have the most comprehensive and scalable products. They have a proven track record of financial performance and an established market presence. In terms of vision, they are perceived to be thought leaders, with well-articulated plans for ease of use, product breadth and how to address scalability. For vendors to have long-term success, they must plan to address the expanded market requirements for EIA, including support for multiple content types; support for the cloud; solid, relevant e-discovery functionality; and a seamless user experience.

Leaders not only must deliver to current market requirements, which continue to change, but also need to anticipate and begin to deliver on future requirements. A cornerstone for Leaders is the ability to articulate how these requirements will be addressed as part of their vision for expanded archive management. As a group, Leaders are considered part of most new purchase proposals and 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; however, they may have elected to focus more heavily on one vertical industry or one EIA use case.

Visionaries

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

Niche Players

Niche Players are narrowly focused on an application, a market or a product mix, or they offer broad capabilities, without the relative success of their competitors in the 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 their competitors. Others are simply new to the market or have fallen behind. Although they're worth watching, they have not yet developed complete functionality or the Ability to Execute.

Context

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

- Pure hierarchical storage management (HSM) products.

- Products designed to address storage growth via archiving, HSM or storage virtualization in very-large-scale file environments.

- Vertically focused archiving solutions that are tightly integrated with specific applications (for example, vendor-neutral archives in the healthcare vertical).

Market Overview

The overall archive software market showed modest growth in 2020, per Gartner's Market Share: Enterprise Infrastructure Software, Worldwide, 2020. Trending continues toward the adoption of SaaS-based archiving platforms, with more notable increases in mature Asia/Pacific and Western Europe. EIA has emerged as a commonly used technology underpinning for higher-level use cases supporting compliance, information governance, e-discovery and the historical preservation of data. Originating as a technology solution targeted specifically at email applications, the EIA market has expanded to include broader support for multiple digital communication and user/application-generated content types.

Basic functionality (including the ability to define retention policies, support e-discovery search, export data for legal review and compliance supervision) has become standard, and we see vendors differentiating their solutions, based more on emerging trends, including:

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

- Organizations are looking to archive and manage multiple content types, including email, workstream collaboration (such as Microsoft Teams and Slack), SharePoint, IM, public and business social media, webpage content, files, SMS, and voice.

- Integration of AI/ML is expanding within the market. Use of AI/ML enables organizations to train policies that automate and improve results of data classification and assess user actions to streamline e-discovery and supervisory review.

- Archiving as a service (aka SaaS) has rapidly surpassed on-premises archiving as the preferred deployment model for most organizations. Gartner sees more than 90% of new or replacement email archiving implementations as being cloud-based.

- Aging on-premises archiving platforms are being replaced by more modern SaaS-based solutions; although it remains difficult, EIA vendors providing migration from one archive to another is becoming commonplace.

Evidence

The analysis and advice provided in this document are built from constant scanning of the market, as well as the aggregation of analysts' experience and ongoing interactions with end users and technology providers. We used a range of sources to feed our perspective on the topics discussed in this document:

- More than 1,600 Gartner customer inquiries and conversations on the topic of archiving between July 2020 and June 2021 were taken into account.

- All vendors in this research responded to an extensive questionnaire regarding their current/future EIA solutions.

- Vendor briefings on the topic of archiving between July 2020 and June 2021 were evaluated.

- Previous Gartner analyses of related and complementary technologies were examined.

- Analysts evaluated customer reviews for this market.

Gartner analysts also leverage secondary sources of information, including primary and secondary research surveys, financial earnings, and media reports.

Evaluation Criteria Definitions

Ability to Execute

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

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

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

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

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

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

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

Completeness of Vision

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

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

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.

Document Revision History

Magic Quadrant for Enterprise Information Archiving - 27 October 2020

Magic Quadrant for Enterprise Information Archiving - 20 November 2019

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Magic Quadrant for Enterprise Information Archiving - 30 October 2017

Magic Quadrant for Enterprise Information Archiving - 5 December 2016

Magic Quadrant for Enterprise Information Archiving - 29 October 2015

Magic Quadrant for Enterprise Information Archiving - 10 November 2014

Magic Quadrant for Enterprise Information Archiving - 5 November 2013

Magic Quadrant for Enterprise Information Archiving - 13 December 2012

Magic Quadrant for Enterprise Information Archiving - 6 December 2011

Magic Quadrant for Enterprise Information Archiving - 29 October 2010

Recommended by the Authors

Some documents may not be available as part of your current Gartner subscription.

How Markets and Vendors Are Evaluated in Gartner Magic Quadrants

Critical Capabilities for Enterprise Information Archiving

Market Guide for E-Discovery Solutions

Toolkit: E-Discovery Solutions Vendor and Product Data

Market Guide for Structured Data Archiving and Application Retirement

2020 Strategic Roadmap for Storage

Market Guide for Workstream Collaboration

Make E-Discovery Stronger Through Information Governance

Market Guide for File Analysis Software

Why 'Store Everything' Is Not an Effective Information Governance Strategy

Table 1: Ability to Execute Evaluation Criteria

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

Source: Gartner (January 2022)

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Table 2: Completeness of Vision Evaluation Criteria

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

Source: Gartner (January 2022)