



mimecast®

The State of Information Archiving Now

FEATURING RESEARCH FROM FORRESTER

Now Tech: Information Archiving, Q4 2018

LEGACY SOLUTIONS ARE NOT ENOUGH

Chances are, your archive was never built to handle the complex challenges of today. Every day you face increasing data volumes, more stringent legal and regulatory compliance requirements, stricter privacy rules, increasing threat of breaches and decreasing employee productivity. At the same time, many legacy solutions are locked in maintenance mode. There has never been a better time to rethink your information management strategy to address modern requirements.

This Now Tech report from Forrester is an invaluable tool for anyone actively considering or comparing Information Archiving solutions. No matter where you sit in your organization, this is a must-read to help you build a modern, secure archive that's purpose built for e-discovery, compliance and end-user productivity. With a credible, side-by-side comparison of leading products, you can make a more informed investment that best fits the diverse needs of your business. According to Forrester, this year's key takeaways are:

BUY FOR COMPLIANCE. PLAN FOR INSIGHTS.

Regulated industries are the leading users of archiving technology, often having no choice in whether or not they retain certain business critical information. While ensuring compliance and controlling audit-readiness is a “must have” for these organizations – many are realizing the added benefits and insights that an accessible archive offers. Mimecast helps customers reduce the risk, cost and complexity of navigating dynamic regulatory requirements, while providing important insights for better collaboration and decision-making. Robust compliance features for automated retention, e-discovery, legal hold and supervision are combined with intuitive, real-time end-user access and mobile tools to keep information at your fingertips.

GOVERN YOUR CORPORATE MEMORY WITH YOUR ARCHIVE.

While “corporate memory” may be today's buzzworthy topic, no one can dispute the benefits of combining data from multiple sources into a common repository. Many organizations are looking for benefits beyond just saving cost and risk, and looking for ways to search, analyze and visualize content to drive innovation. Information archives are moving from hidden, siloed applications to multi-purpose solutions that serve every part of your business. Mimecast makes data accessible across the workforce while automating its strict governance, boosting data resilience and alleviating the burden on IT to reducing both risks and costs for the business as a whole.

NEXT-GENERATION VENDOR SELECTION.

The volume and scale of today's data footprint are pushing older archiving architectures to their limit. The pain of data migration from a legacy solution to a new one can be the biggest inhibitor in modernizing your investment. This report, along the Forrester Wave™ report for Information Archiving,

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can take the guesswork out of selecting a deployment model, connector strategy and set of capabilities that best fit your needs. Mimecast revolutionizes the migration headache with a new, zero-down, end-to-end migration service. Direct connectors, coupled with deep domain expertise in data migration, make moving to a next-generation solution finally a viable and realistic alternative to the archaic solutions of the past.

HOW TO TAKE ACTION

After reading the Forrester research, you may be considering rethinking your archive strategy to meet next-generation requirements. Educating cross-functional stakeholders across legal, IT, security and compliance will be required. Start a dialogue about your organization's risk profile as well as how you can team together to get more value from your information. This enables real-time decision making and will help you unlock the full potential of your stored information.

IT, legal and compliance leaders should use this report to understand the value they should expect from an archiving provider and use the recommendations and research as a guide in the development of your plans and strategy for modernizing information archiving.

Now Tech: Information Archiving, Q4 2018

Forrester's Overview Of 24 Information Archiving Providers

by Cheryl McKinnon

December 7, 2018

Why Read This Report

You can use information archiving platforms to meet information governance and compliance requirements, speed responses to investigations, and build a foundation for analytics on structured and unstructured data. But to achieve these benefits, you'll first have to select from a diverse set of vendors that vary by size, functionality, geography, and vertical market focus. Enterprise architecture (EA) professionals should use Forrester's Now Tech report to understand the value they can expect from an archiving provider and select vendors that best fit their requirements.

Key Takeaways

Analyze And Govern Corporate Memory With Information Archiving

Regulated industries are top users of archiving platforms. Innovative vendors help these businesses stay current and adopt the communication and collaboration channels their customers and employees demand without sacrificing compliance obligations.

Select Vendors Based On Size And Functionality

The information archiving market is consolidating and shifting to the cloud. Choose the deployment model, connector strategy, and set of capabilities that fit your needs best.

Invest For Compliance, But Plan For Knowledge Discovery Benefits

Archiving provides an opportunity to combine data, content, or communications from multiple sources into a common repository. Enhanced analytics open the door to insights and patterns hidden in their source applications.

Now Tech: Information Archiving, Q4 2018

Forrester's Overview Of 24 Information Archiving Providers



by [Cheryl McKinnon](#)

with [Daniel Hong](#), [Nick Hayes](#), [Noel Yuhanna](#), [Caleb Ewald](#), and [Andrew Reese](#)

December 7, 2018

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Related Research Documents

[The Forrester Wave™: Information Archiving Cloud Providers, Q4 2016](#)

[Now Tech: eDiscovery Technologies, Q3 2018](#)

[TechRadar™: Data Security And Privacy, Q4 2017](#)



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Analyze And Govern Corporate Memory With Information Archiving

Businesses — particularly in regulated or public sectors — have obligations to not only capture and preserve records of communication and decisions but also to find and produce them when regulators, auditors, legal teams, customers, or citizens make requests. Forrester defines information archiving as:

Technologies that migrate digital information (in the form of structured data, application data, documents, files, email, content, or social media) from source systems into a repository, retaining the information for a specified period. Solutions may be specialized for one specific data type (such as email), or be broad and comprehensive, supporting multiple data or content types.

Enterprises with compliance obligations invest in archiving technologies to meet externally imposed requirements to capture, preserve, and retrieve data, content, and/or communications. Archiving technologies can also help them meet internal policies for records retention or knowledge capture and preservation. Application or decommissioning projects also drive archiving investments, keeping older data available even as its source system is migrated or shut down. With the right archiving platforms, EA pros can help technology, security, and compliance decision makers:

- › **Perform faster search and discovery.** Regulated businesses and those in litigious industries are under pressure to search, filter, analyze, and export or share their data. Expanding data privacy and protection laws will increase this. Archiving buyers demand data visualization tools and analytics to weed through large volumes of data and review it.¹
- › **Exceed governance and compliance goals.** Automated capture of email, messaging, or social media, with related metadata, ensures consistent retention policies that rely less on user-driven tagging. Financial services firms often require proactively supervised communication, and vendors are responding with analytics to detect violations.
- › **Lay a foundation for analytics and insights.** Analytics, data visualization, and machine learning in archiving platforms reveal use cases beyond basic governance and compliance. These tools can tag content and analyze it for a broad set of knowledge discovery use cases, identifying patterns of information use and exchange.

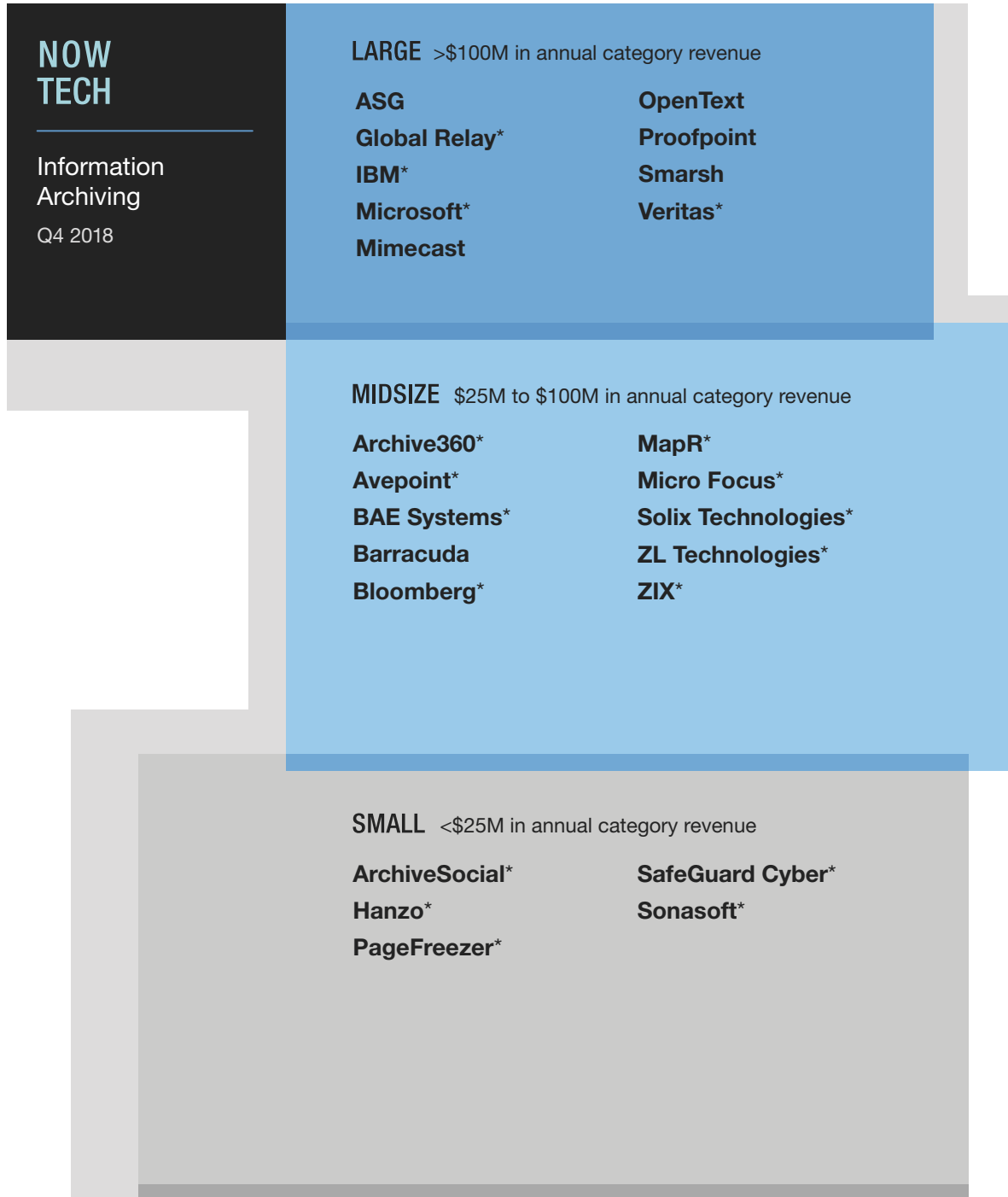
Select Vendors Based On Size And Functionality

We've based our analysis of the information archiving market on two factors: market presence and functionality. Some vendors will focus in one area of functionality, while others will provide capabilities in multiple segments.

INFORMATION ARCHIVING MARKET PRESENCE SEGMENTS

We segmented the vendors in this market into three categories, based on information archiving product revenue (licenses or subscription): large established players (more than \$100 million in archiving product revenue), midsize players (\$25 million to \$100 million in product revenue), and smaller players (less than \$25 million in product revenue) (see Figure 1). We did not include vendors that we estimated to have less than \$2 million in revenue.

FIGURE 1 Now Tech Market Presence Segments: Information Archiving, Q4 2018



*Forrester estimate

INFORMATION ARCHIVING: FUNCTIONALITY SEGMENTS

To explore functionality at a deeper level, we broke the information archiving market into four segments, each with varying capabilities (see Figure 2 and see Figure 3):

- › **Content and document (C&D) archiving.** Vendors integrate with archive network drives, personal drives, collaboration sites, or content management platforms. Users archive unstructured data to manage retention, aid in investigative searches, and preserve items with long-term business value. They may archive inactive content as part of a migration effort to preserve important data for legal or historical purposes. Deployment is typically on-premises or in a private cloud/hosted model. Adoption is mature: 70% of global client path security decision makers at enterprises have implemented it.²
- › **Email and message (E&M) archiving.** Vendors provide ingestion capabilities for common email platforms and messaging services (such as instant messaging, chat, SMS, video, or voice). The primary drivers for adoption are legal discovery, internal or external investigations, or regulatory compliance. Vendors may also provide personal archive apps to support end user needs for easy, searchable access to historical communication. Multitenant software-as-a-service (SaaS) is the dominant deployment model. Adoption is mature, with 65% of enterprise respondents deploying it.³
- › **Social media and website (SM&W) archiving.** Vendors provide connectors for a broad range of social media channels to capture both outbound company and internal employee posts as well as inbound customer discussions. In large part, legal discovery or regulatory compliance obligations (such as for customer communication in financial services or product marketing in life sciences) drive the need for this. These specialty vendors often license their connector portfolio to other archiving providers as OEMs or partner add-ons. Deployment is typically SaaS, but some vendors offer on-premises or private cloud options.
- › **Structured data archiving.** Vendors provide ingestion and integration capabilities for data repositories such as enterprise applications and applications based on SQL databases — or increasingly on NoSQL or big data repository platforms. The primary drivers are extracting inactive data for application performance purposes, decommissioning legacy applications while retaining useful data, or aiding in data analytics initiatives. Deployments are typically on-premises or in a private cloud/hosted model. Adoption is mature, with 70% of our enterprise respondents having deployed it.⁴

Align Individual Vendor Solutions To Your Organization's Needs

The following tables provide an overview of vendors with details on functionality category, geography, and vertical market focus (see Figure 4, see Figure 5, and see Figure 6).

FIGURE 2 Now Tech Functionality Segments: Information Archiving, Q4 2018, Part 1

	Content and documents (C&D)	Email and messaging (E&M)
Repository services	■■■	■■■
Data recognition and extraction services	■■■	■■■
Retention management and legal holds	■■■	■■■
Supervision/surveillance for compliance	■■■	■■■
eDiscovery/investigative search	■■■	■■■
Personal archive apps	■■■	■■■
Application decommissioning	■■■	■■■
Analytics (including machine learning)	■■■	■■■
Integrations for email and common messaging platforms	■■■	■■■
Integrations for SQL and NoSQL data sources or enterprise applications	■■■	■■■
Integrations for content or collaboration platforms, network drives	■■■	■■■
Integrations for social media sources	■■■	■■■
Website or page capture	■■■	■■■
Multitenant SaaS deployment	■■■	■■■
On-premises or private cloud deployment	■■■	■■■

■■■ High segment functionality ■■■ Moderate segment functionality ■■■ Low segment functionality

FIGURE 3 Now Tech Functionality Segments: Information Archiving, Q4 2018, Part 2

	Social media & website (SM&W)	Structured data archiving
Repository services	■ ■ ■	■ ■ ■
Data recognition and extraction services	■ ■ ■	■ ■ ■
Retention management and legal holds	■ ■ ■	■ ■ ■
Supervision/surveillance for compliance	■ ■ ■	■ ■ ■
eDiscovery/investigative search	■ ■ ■	■ ■ ■
Personal archive apps	■ ■ ■	■ ■ ■
Application decommissioning	■ ■ ■	■ ■ ■
Analytics (including machine learning)	■ ■ ■	■ ■ ■
Integrations for email and common messaging platforms	■ ■ ■	■ ■ ■
Integrations for SQL and NoSQL data sources or enterprise applications	■ ■ ■	■ ■ ■
Integrations for content or collaboration platforms, network drives	■ ■ ■	■ ■ ■
Integrations for social media sources	■ ■ ■	■ ■ ■
Website or page capture	■ ■ ■	■ ■ ■
Multitenant SaaS deployment	■ ■ ■	■ ■ ■
On-premises or private cloud deployment	■ ■ ■	■ ■ ■

■ ■ ■ High segment functionality
 ■ ■ ■ Moderate segment functionality
 ■ ■ ■ Low segment functionality

FIGURE 4 Now Tech Large Vendors: Information Archiving, Q4 2018

LARGE >\$100M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (top three by revenue %)	Sample customers
ASG	C&D, E&M, structured data	NA 80%; EMEA 20%*	Financial services, insurance, commercial services	Invesco, Liberty Mutual
Global Relay	C&D, E&M, SM&W	NA 75%; EMEA 20%; AP 5%*	Financial services, public sector, professional services	HSBC, Société Générale, TD Ameritrade
IBM	C&D, E&M, structured data	NA 50%; EMEA 30%; AP 20%*	Financial services, telecommunications, healthcare	J.B. Hunt, Molina Healthcare, Towers Watson
Microsoft	C&D, E&M	NA 50%; EMEA 30%; AP 20%*	Financial services, public sector, consumer goods*	City of Chicago, The Linde Group, Nations Trustbank
Mimecast	C&D, E&M, SM&W	NA 48%; EMEA 47%; AP 5%*	Professional services, financial services, legal services	Four Communications, Maurice Blackburn Lawyers, Stellenbosch Local Municipality
OpenText	C&D, E&M, structured data	NA 60%; EMEA 30%; AP 10%*	Financial services, professional services, high-tech	Maymilad Water Services, Pacific Life, Techint Group
Proofpoint	C&D, E&M, SM&W	NA 80%; EMEA 15%; AP 5%*	Financial services, healthcare, public sector	Advanced Auto Parts, National Financial Partners, Wedbush Securities
Smarsh	C&D, E&M, SM&W	NA 80%; EMEA 20%*	Financial services, government, commercial	City of Sunnyvale, Calif., Securities America, Standard Life
Veritas	C&D, E&M, SM&W	NA 50%; EMEA 30%; AP 20%*	Financial services, manufacturing, public sector	Bluesource, Inhabit, Kaufman Miller & McAndrew

*The vendor did not provide information for this cell; this is Forrester's estimate.

FIGURE 5 Now Tech Midsize Vendors: Information Archiving, Q4 2018

MIDSIZE \$25M to \$100M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (top three by revenue %)	Sample customers
Archive360	C&D, E&M, structured data	NA 70%; EMEA 30%*	Financial services, public sector, healthcare	MillerCoors, US Dept. of Homeland Security, XL Catlin
Avepoint	C&D, E&M, SM&W	NA 60%; EU 20%; AP 20%*	Manufacturing, financial services, public sector	Japan Business Systems, NEC Networks, Airways New Zealand
BAE Systems	E&M	NA 100%*	Banking and securities, insurance, retail	Community Bank, First Federal Bank
Barracuda	E&M	NA 75%; EMEA 20%; AP 5%*	Manufacturing, government, education	City of Bellingham, Wash., City of Lake Oswego, Ore., Systel
Bloomberg	C&D, E&M, SM&W, structured data	NA 50%; EU 40%; AP 10%*	Financial services, broker-dealers, hedge funds	Aegon, Hilliard Lyons, Whitaker Securities
MapR	C&D, E&M, SM&W, structured data	NA 58%; EMEA 24%; AP 18%	Financial services, telco/media, healthcare	Aadhaar, Comscore, United Healthcare,
Micro Focus	C&D, E&M, SM&W, structured data	NA 60%; EMEA 30%; AP 10%*	Finance, legal, government	Croatian Radiotelevision, Florida Historic Royal Palaces, Polk County, Fla.

*The vendor did not provide information for this cell; this is Forrester's estimate.

FIGURE 5 Now Tech Midsize Vendors: Information Archiving, Q4 2018 (Cont.)**MIDSIZE** \$25M to \$100M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (top three by revenue %)	Sample customers
Solix Technologies	C&D, E&M, SM&W structured data	NA 80%; EMEA 20%*	Financial services, healthcare, manufacturing	Alberta Health Care, Duke Energy, Finisar
ZL Technologies	C&D, E&M, SM&W, structured data	NA 80%; EMEA 20%*	Financial services, manufacturing, healthcare	Crews and Associates, NARA, Raymond James
ZIX	E&M, SM&W	North America 80%; EMEA 20%*	Financial services, healthcare, government	Investacorp, Washington Wealth Management, RW Paul & Assoc.

*The vendor did not provide information for this cell; this is Forrester's estimate.

FIGURE 6 Now Tech Small Vendors: Information Archiving, Q4 2018

SMALL <\$25M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (top three by revenue %)	Sample customers
ArchiveSocial	SM&W	NA 100%*	Government, law enforcement, education	City of Dallas, City of Kitsap, Wash., City of Santa Barbara, Calif.
Hanzo	SM&W	NA 80%; AP 20%*	Financial services, insurance, government	Coca-Cola, Facebook, T. Rowe Price
PageFreezer	C&D, SM&W	NA 80%; EMEA 20%*	Financial services, government, healthcare	City of Sacramento, Calif., NARA, Prudential
SafeGuard Cyber	C&D, SM&W	NA 80%; EMEA 20%*	Financial services, life sciences, consumer goods	Abbott, Johnson & Johnson, USAA
Sonasoft	E&M	NA 80%; EMEA 20%*	Government, financial services, manufacturing	BSN Sports, Holman Automotive, Investar Bank

*The vendor did not provide information for this cell; this is Forrester's estimate.

Recommendations

Invest For Compliance, But Plan For Knowledge Discovery Benefits

The information archiving market has served key use cases such as information governance and storage efficiencies for more than two decades. EA professionals are now modernizing their investments, opting for cloud providers, and looking for business benefits beyond reducing risk and costs. Be prepared to:

- › **Select modern architectures to break through search and performance barriers.** The volume and scale of today's data footprint are pushing older archiving architectures to their limits. Speed is a feature — look at vendors with newer architectures that can scale as data and communication volume grows.

- › **Match the vendors to your use cases — one size may not fit all.** The dilemma: Look at point solutions for specific archiving use cases, or select a comprehensive platform that accommodates multiple types of data or content? A single platform delivers consistent retention, discovery, and analytics capabilities, but some specialized use cases may demand preservation of native formats, use of specific storage types, or integration with niche collaboration apps. Know what legal or regulatory requirements are must-have versus nice to have.
- › **Stay on top of your vendor's road map.** Since 2016, many vendors have divested, merged, or decided to sunset of their products. Look at the market with fresh eyes. Understand migration options to newer platforms from existing vendors or exit strategies if those vendors no longer meet your needs. Push them about their areas of investment and how they'll enhance their features and pricing models to stay competitive.
- › **Exceed compliance and governance mandates — analytics drives innovation.** Archive platforms have introduced enhanced search, content analytics, data visualization, and machine learning platforms to meet legal and other investigative discovery use cases. These capabilities now open the door to a range of opportunities for productivity and knowledge discovery. Understand where insights into communication and collaboration patterns can inform better customer or employee experience or give users access to information otherwise hidden in siloed applications.

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Supplemental Material

MARKET PRESENCE METHODOLOGY

We defined market presence in Figure 1 based on factors such as annual revenue attributed to the vendor's information archiving product license and subscription sales.

To complete our review, Forrester requested information from vendors. If vendors did not share this information with us, we made estimates based on available secondary information. We've marked companies with an asterisk if we estimated revenues or information related to geography or industries. Forrester fact-checked this report with vendors before publishing.

SURVEY METHODOLOGY

The Forrester Analytics Global Business Technographics® Security Survey, 2018, was fielded between May and June 2018. This online survey included 3,089 respondents in Australia, Canada, China, France, Germany, the UK, and the US from companies with two or more employees.

Forrester Analytics' Business Technographics ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of business and technology products and services. Research Now fielded this survey on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates.

Please note that the brand questions included in this survey should not be used to measure market share. The purpose of Forrester Analytics' Business Technographics brand questions is to show usage of a brand by a specific target audience at one point in time.

Endnotes

- ¹ Global privacy and data protection laws, such as the EU's General Data Protection Regulation (GDPR), will increase the demand on enterprises to find, review, and disclose and/or dispose of data. See the Forrester report "[Identify Companywide Roles And Responsibilities To Support Your GDPR Compliance Efforts.](#)"
- ² Source: Forrester Analytics Global Business Technographics Security Survey, 2018.
- ³ Source: Forrester Analytics Global Business Technographics Security Survey, 2018. We surveyed 380 global client security path decision makers at enterprises (1,000-plus employees).
- ⁴ Source: Forrester Analytics Global Business Technographics Security Survey, 2018. We surveyed 380 global client security path decision makers at enterprises (1,000-plus employees).

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Thousands of organizations trust Mimecast to increase their cyber resilience preparedness, streamline compliance, reduce IT complexity and keep their business running. We give employees fast and secure access to sensitive business information, and ensure email keeps flowing in the event of an outage. Mimecast will remain committed to protecting your information assets through constant innovation and focus on your success.

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