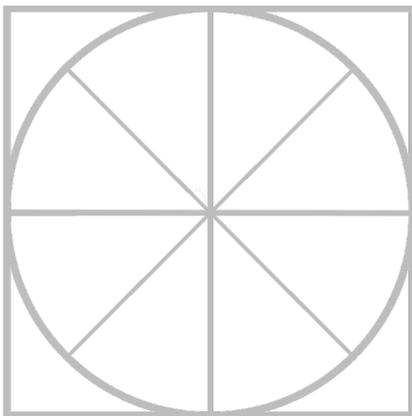# THE RADICATI GROUP, INC.

Information Archiving - Market Quadrant 2019

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

February 2019

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RADICATI MARKET QUADRANTS EXPLAINED

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

1. *Top Players* – These are the current market leaders with products that offer, both breadth and depth of functionality, as well as possess a solid vision for the future. Top Players shape the market with their technology and strategic vision. Vendors don't become Top Players overnight. Most of the companies in this quadrant were first Specialists or Trail Blazers (some were both). As companies reach this stage, they must fight complacency and continue to innovate.

2. *Trail Blazers* – These vendors offer advanced, best of breed technology, in some areas of their solutions, but don't necessarily have all the features and functionality that would position them as Top Players. Trail Blazers, however, have the potential for "disrupting" the market with new technology or new delivery models. In time, these vendors are most likely to grow into Top Players.

3. *Specialists* – This group is made up of two types of companies:

   a. Emerging players that are new to the industry and still have to develop some aspects of their solutions. These companies are still developing their strategy and technology.

   b. Established vendors that offer very good solutions for their customer base, and have a loyal customer base that is totally satisfied with the functionality they are deploying.

4. *Mature Players* – These vendors are large, established vendors that may offer strong features and functionality, but have slowed down innovation and are no longer considered "movers and shakers" in this market as they once were.

   a. In some cases, this is by design. If a vendor has made a strategic decision to move in a new direction, they may choose to slow development on existing products.

b. In other cases, a vendor may simply have become complacent and be out-developed by hungrier, more innovative Trail Blazers or Top Players.

c. Companies in this stage will either find new life, reviving their R&D efforts and move back into the Top Players segment, or else they slowly fade away as legacy technology.

Figure 1, below, shows a sample Radicati Market Quadrant. As a vendor continues to develop its product solutions adding features and functionality, it will move vertically along the "y" functionality axis.

The horizontal "x" strategic vision axis reflects a vendor's understanding of the market and their strategic direction plans. It is common for vendors to move in the quadrant, as their products evolve and market needs change.

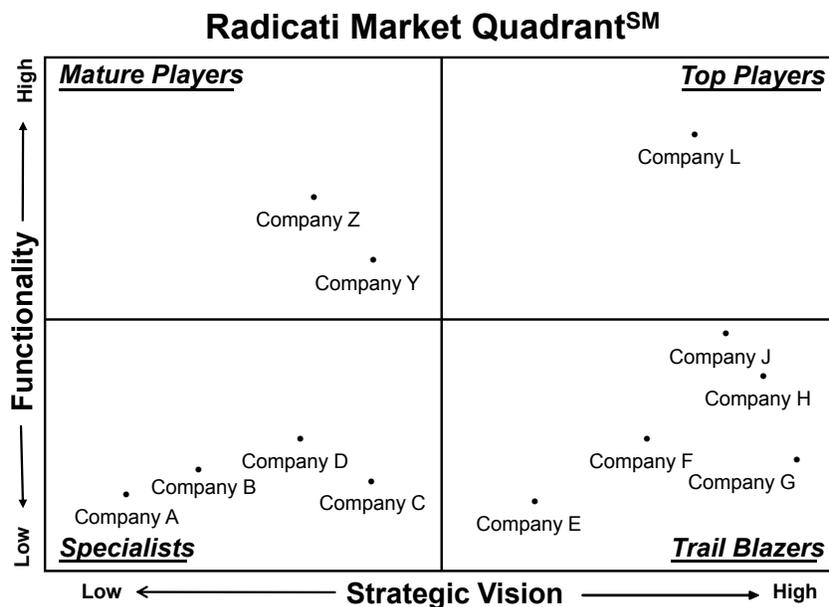## Radicati Market Quadrant^{SM}

Figure 1: Sample Radicati Market Quadrant

INCLUSION CRITERIA

We include vendors based on the number of customer inquiries we receive throughout the year. We normally try to cap the number of vendors we include to about 10-12 vendors. Sometimes, however, in highly crowded markets we need to include a larger number of vendors.

MARKET SEGMENTATION – INFORMATION ARCHIVING

Information archiving solutions provide interactive, secure long-term storage of electronic business content, including: email, instant messages, social media, file systems, SharePoint content, and a broad range of other structured and unstructured information. In addition to archiving, these solutions must also provide fast, easy search and retrieval of information, and allow organizations to set granular retention policies which provide the foundation for Supervision, eDiscovery, Legal Hold, Data Loss Prevention (DLP), and Information Governance.

Information Archiving solutions are defined as follows:

- **Information Archiving** – are solutions which provide interactive, secure long-term storage of electronic business content, including: email, instant messages, social media, file systems, SharePoint content, and a broad range of other structured and unstructured information. These solutions are delivered as on-premises products, appliances, or as cloud services. Key vendors in this segment include: *Barracuda Networks, Google, Jatheon, Micro Focus, Microsoft, Mimecast, OpenText, Proofpoint, Smarsh, Veritas,* and others.

- Business organizations will typically deploy an information archiving solution to meet one or more of the following use cases:

  o *Compliance with Regulatory Requirements* – organizations in heavily regulated industries are required to retain and preserve electronic information to meet government and/or industry regulatory requirements.

  o *Litigation* – during internal and external legal proceedings, organizations will need to efficiently search, discover, and retrieve all pertinent information.

  o *Internal Corporate Policies* – many organizations have large amounts of electronic content that needs to be managed and disposed of according to internal corporate policies.

  o *Leveraging Information through Content Analytics* – organizations are increasingly using information archiving solutions to provide valuable insight into their stored data.

- o *Data and Information Security* – information archiving solutions help secure information in a long term repository, where content can be easily restored in the event of a disaster or during any planned or unplanned downtime.

- Figure 2, shows the worldwide Information Archiving market revenue from 2019 to 2023. The total market will be over $5.5 billion in revenues by year-end 2019, and will grow to over $8.8 billion by 2023.
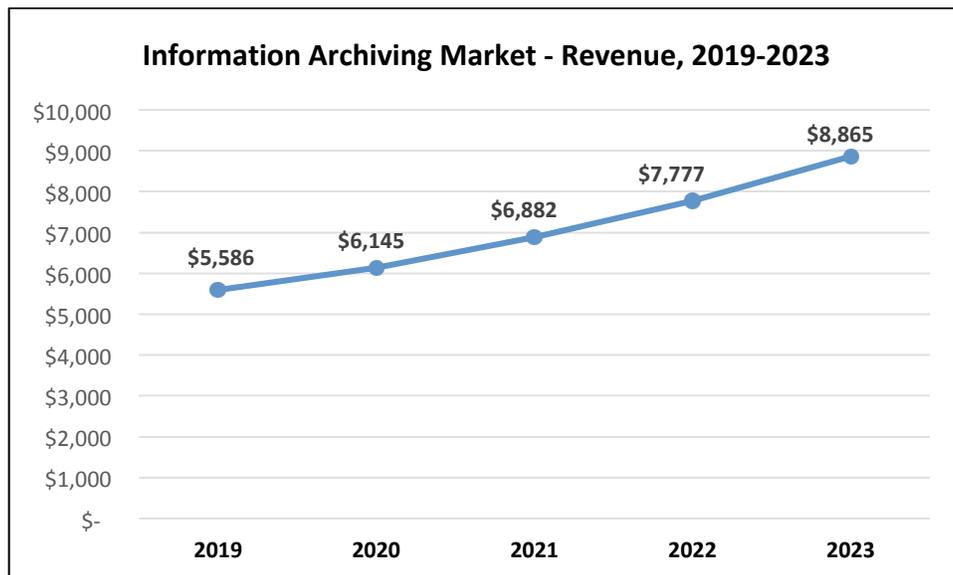
Figure 2: Worldwide Information Archiving Revenue, 2019-2023

EVALUATION CRITERIA

Vendors are positioned in the quadrant according to two criteria: *Functionality* and *Strategic Vision*.

Functionality is assessed based on the breadth and depth of features of each vendor's solution. All features and functionality do not necessarily have to be the vendor's own original technology, but they should be integrated and available for deployment when the solution is purchased.

Strategic Vision refers to the vendor's strategic direction, which comprises: a thorough understanding of customer needs, ability to deliver through attractive pricing and channel models, solid customer support, and strong on-going innovation.

Vendors in the *Information Archiving* space are evaluated according to the following key features and capabilities:

- *Deployment Options* – availability of the solution in different form factors, such as on-premises solutions, cloud-based services, hybrid, appliances and/or virtual appliances.

- *Email Platform Support* – the range of email platforms supported, such as Microsoft Exchange, IBM Domino, and others.

- *Cloud Messaging Support* – archiving support for cloud-based messaging solutions, such as Microsoft Office 365 or Google G Suite.

- *Support for Multiple Content Sources* – archiving of a broad range of information types, including: email, file systems, Microsoft SharePoint, social media (both business and consumer services), IM, voice/video, and more.

- *Automated Content Indexing* – automatic indexing and tagging of information for fast, easy search.

- *Storage Reduction* – the removal of redundant data from repositories is an important capability that is necessary in order to maintain storage efficiency, reduce storage space, and

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

- *Search* – in addition to basic search functionality (search by sender, recipient, subject, date or contents of a message) information archiving solutions should provide a robust set of advanced search capabilities, including: concept, Boolean, proximity, and more.

- *Archive Access* – archived information should be easily accessible through a desktop, a web-based and/or a mobile client. Mobile app based access is preferred.

- *Retention Policies* – businesses should be able to define retention periods for archived data depending on their own retention schedules. Disposition of archived data can occur by age, date, user, folder, sender, recipient, subject, and other parameters.

- *eDiscovery Capabilities* – basic eDiscovery capabilities should be provided for legal hold, advanced search, tagging, data export, and more.

- *Data Migration from Legacy Systems* – support for migrating data in PST, NSF, and other formats from other archives.

- *Website Archiving* – the ability to capture and preserve full websites including web pages, blog posts, images, videos and more in their native formats in the event that they need to be produced for litigation, or to comply with regulatory requirements.

- *Mobile Access* – access to archived content through a mobile app, or a mobile browser (i.e. smartphone, tablet, laptop, etc.). Mobile app based access is preferred.

- *Multi-language Localization* – availability of archiving solutions with administrative and user interfaces localized in multiple languages.

In addition, for all vendors we consider the following aspects:

- *Pricing* – what is the pricing model for their solution, is it easy to understand and allows customers to budget properly for the solution, as well as is it in line with the level of functionality being offered, and does it represent a "good value".

- *Customer Support* – is customer support adequate and in line with customer needs and response requirements.

- *Professional Services* – does the vendor provide the right level of professional services for planning, design and deployment, either through their own internal teams, or through partners.

<u>Note</u>: On occasion, we may place a vendor in the Top Player or Trail Blazer category even if they are missing one or more features listed above, if we feel that some other aspect(s) of their solution is particularly unique and innovative.

MARKET QUADRANT – INFORMATION ARCHIVING

Radicati Market Quadrant^{SM}
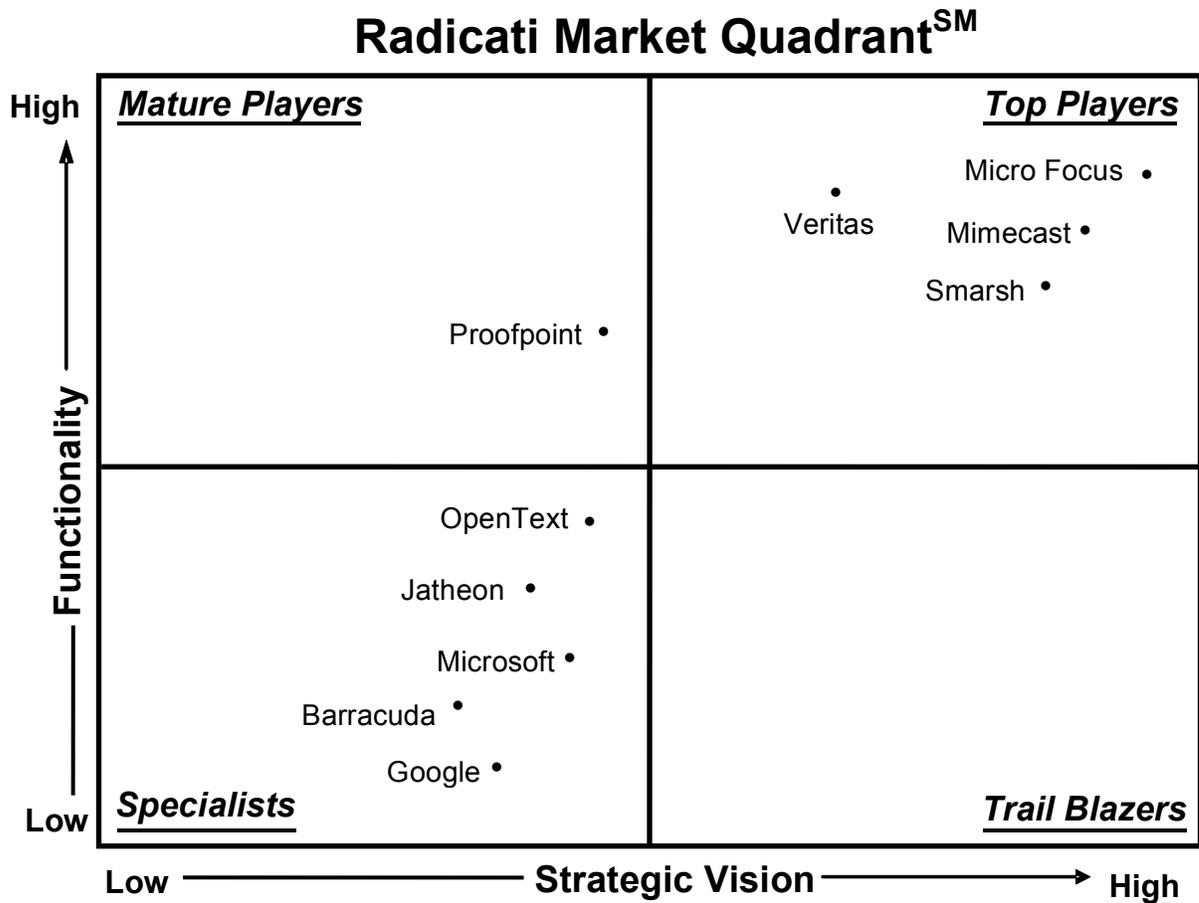
Figure 3: Information Archiving Market Quadrant, 2019

KEY MARKET QUADRANT HIGHLIGHTS

- The **Top Players** in the Information Archiving market are *Micro Focus, Veritas, Mimecast,* and *Smarsh*.

- There are no **Trail Blazers** in this market at this time.

- The **Specialists** quadrant includes *OpenText*, *Jatheon, Microsoft, Barracuda,* and *Google.*

- The **Mature Players** quadrant includes *Proofpoint*.

INFORMATION ARCHIVING - VENDOR ANALYSIS

TOP PLAYERS

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Micro Focus International is a global, software and IT company which delivers products, IT services and consultancy to customers worldwide. In 2016, Micro Focus acquired GWAVA, a provider of archiving and messaging security solutions. In 2017, Micro Focus merged with Hewlett Packard Enterprise (HPE)'s software business segment, making it one of the largest pure-play software companies in the world. Micro Focus is traded on the London Stock Exchange.

SOLUTION

Micro Focus offers enterprise information archiving capabilities through two acquisitions: **Digital Safe** from HPE, and **Retain Unified Archiving** from GWAVA. Retain is available as

either a cloud or as an on-premises solution, while Digital Safe is available only as a cloud solution. Both solutions support information governance, legal, privacy, and compliance use cases. Digital Safe is oriented towards large, highly regulated enterprises, while Retain is aimed at the midmarket in a broad range of industries, including Education and Law Enforcement.

- **Digital Safe** – offers unified archiving, employee supervision, eDiscovery, Early Case Assessment, investigative analytics and social media governance. It is a hosted solution delivered primarily in a private cloud. Digital Safe is integrated with other products within the Micro Focus portfolio, such as IDOL for access to data in hundreds of repositories across the enterprise through a broad connector feature set. It also integrates with key products in Micro Focus' Secure Content Management (SCM) portfolio, including ControlPoint and Structured Data Manager for long-term archival of historical unstructured and structured information respectively, as well as to solve broader problems such as GDPR/privacy. Digital Safe 10, released in late 2017, extended these capabilities and included open RESTful APIs, mobile archiving, a new UI and user experience, and enhanced analytics and reporting. It provides analytical enrichments, entity extraction, sentiment analysis and advanced multi-media features (in support of MiFID II) for phone, voice and image archiving, search and analysis. These include voice-to-text transcriptions and image-to-text extraction. Digital Safe offers the following capabilities:

  o *Policy Management* – Digital Safe provides three forms of policies that can be defined for data controls; preservation, operational, and compliance policies, along with various attributes besides user information that can be used to define policies. Digital Safe retention policies can manage data based on AD groups, folders and users. Retention can be set based on any of these characteristics. It also includes >75 expert-build policy filters that leverage best practices from a broad set of customers for supervision.

  o *Compliance* – Digital Safe features enterprise-class security, data is secured in a private cloud within datacenters that are SOC2 compliant to ensure data security, availability, processing integrity, confidentiality and privacy. All data remains segregated, encrypted at rest, and is protected across multiple geographically separated datacenters utilizing split-cell 17A4 certified WORM technology to prevent data loss.

  o *eDiscovery* – Digital Safe optionally offers post-collection eDiscovery, from processing and advanced analytics to review and production. It supports investigations and early case assessment with the ability to cluster and automatically provide search

refinement/guidance, plus various forms of document review, such as technology-assisted review (TAR).

- o *Access* – Digital Safe provides access to the archive via DSmail, and offers mobile-device-aware access through most standard Web browsers with an HTML5 interface. It also includes a suite of enterprise scale Restful APIs to support secure access to data in place, reducing risk, costs and complexity.

- o *Reporting* – Digital Safe offers full notification workflow, and all actions taken in the system are audited, and it features many operational reports that can be tailored to customer needs.

- **Retain** – provides retention policies at the point of archiving, and offers easy installation and administration. Its primary use cases are compliance and eDiscovery, while supervision capabilities are available through a third party, and planned integration with Micro Focus Supervisor. Data collected from multiple sources can be viewed and searched in the archive via a single interface in a unified format. Retain does not integrate with records management or ECM systems; however, it does offer a REST API, which can be used for integration with external systems and solutions. Retain offers the following capabilities:

- o *Policy Management* – All Retain policies are audited for security purposes, and comprehensive audit logs are kept for all actions in the archive. Retention policies are fully customizable and automated, allowing organizations to define the message retention length and type of message to be archived.

- o *Compliance* – Retain's WORM compliance is supported through proprietary third party storage providers such as EMC, Hitachi and HPE, and through iTernity iCAS support. Data in flight can be encrypted via SSL, while message body data supports AES-256 encryption. Metadata is encrypted in the database management system (DBMS).

- o *eDiscovery* – Retain offers integrated eDiscovery which facilitates searching across content types, including outside the archive. It also offers a redaction feature via an external publishing client, and can support multiple preservations on objects stored in the archive.

- o *Access* – Retain's end-user-directed archiving is achieved by either an email to a specific folder (or set of folders) or by assigning a category to relevant messages. It also offers plug-ins for GroupWise and Outlook, a web based interface, on offline viewer, and a mobile app for archive access.

- o *Reporting* – Retain's Reporting and Monitoring module provides reporting for auditing, archive job status, archive storage status, index status, general server statistics and more.

Micro Focus also offers a rich set of capabilities for search and analytics through integrations with its homegrown IDOL and Vertica technologies. These analytics can be leveraged to streamline eDiscovery and investigations and manage information risk within the organization. The analytics can also be tuned for deriving insights from enterprise information – e.g., best practices, under-funded parts of the business, market insights and more.
Micro Focus supports a wide range of compliance requirements, including SEC, FINRA, Dodd-Frank, MiFID II, GDPR, HIPPA, FTC, and FDA – offering the ability to address these needs with "a single pane of glass."

STRENGTHS

- Digital Safe, in conjunction with its information governance portfolio, can meet the most rigorous compliance requirements of large global enterprises.

- Digital Safe and Retain support a very broad set of enterprise content sources, including: email, IM, Microsoft SharePoint, social media, voice recordings, images, files, mobile and more.

- Digital Safe and Retain support a broad range of email platforms, which include: Microsoft Exchange, IBM Domino, Novell GroupWise, Microsoft Office 365, Google G Suite, and others.

- Retain's administrative and compliance interface is easy to use for administrators, human resources, legal personnel, auditors, compliance personnel and other named users.

- Micro Focus' Social Media Governance allows organizations to supervise, monitor and archive social media. This allows organizations to permit the use of social media, while maintaining oversight and auditing trails.

- Micro Focus solutions provide intelligent understanding and rich visibility across most enterprise information to support business critical functions including search, eDiscovery, preservation, and regulatory compliance.

- Micro Focus archiving and eDiscovery products offer enterprise-grade scalability together with visual analytics and Technology Assisted Review (TAR) to support the large, complex legal matters.

WEAKNESSES

- Digital Safe is largely focused on addressing the complex needs of organizations in heavily regulated or litigious industries, through a hosted solution. It is a feature-rich solution, which is best deployed in the context of a full information lifecycle management strategy.

- Micro Focus does not offer a native DLP solution, however, they do deliver some DLP functionality through their information governance framework.

- Digital Safe, though priced at a premium, offers capabilities and features to support the highly complex compliance and information governance requirements required by larger enterprises.

- Retain's archiving is limited to messaging, attachments and social media, but does not currently support file archiving.

- Micro Focus has been working to integrate the two product lines from its acquisition of Digital Safe and Retain, however, some work still remains to ensure customers get the full benefit of the combined portfolios. Customers should check carefully on the features they expect in each solution component.

VERITAS TECHNOLOGIES

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Veritas Technologies offers information management solutions aimed at enterprise needs for governance and compliance. Veritas' Information Governance product portfolio includes solutions for: archiving, eDiscovery, data insights/file analysis, data management and more. Veritas Technologies LLC was established as an independent private company in early 2016, following the split from Symantec Corporation. The company is owned by The Carlyle Group, a private equity firm.

SOLUTION

Veritas offers both on-premises and cloud-based archiving solutions under the **Enterprise Vault** brand name. **Veritas Enterprise Vault** and **Veritas Enterprise Vault.cloud** are part of its broader information governance portfolio.

- **Veritas Enterprise Vault** – is the on-premises Archiving solution, which supports archiving of email, Microsoft SharePoint content, IMs, file servers, social media content, and more. The solution archives to and may be deployed in popular cloud platforms, such as Amazon Web Services, Google Cloud and Microsoft Azure. Administrative tools, such as dashboards and wizards, help simplify the management process. It can also integrate with specialized solutions that offer archiving for specific types of data and information, including text, voice, social media and instant messaging. Enterprise Vault also offers "Classification Defined Storage," which can route content to a different Storage Partition based on classification rules. In addition, Enterprise Vault supports Intelligent Review, a feature of Enterprise Vault Compliance Accelerator, which learns from user behavior to build a knowledge base to automatically prioritize relevant content for review. The Enterprise Vault product portfolio includes:

  - *Email Management for Enterprise Vault* – is a stand-alone software based solution, which offers automated Microsoft Exchange Server and Domino mailbox management via active mailbox and journal archiving. Enterprise Vault for Microsoft Exchange supports on-premises Microsoft Exchange Server and Microsoft Office 365. Veritas has

added decryption support for Microsoft AIP for Office 365 email to allow archiving and indexing of encrypted content.

o *Enterprise Vault For Instant Messaging* – offers the ability to capture Skype for Business on-premises content including peer-to-peer and group conversations.

o *Enterprise Vault for Microsoft SharePoint* – offers archiving support for Microsoft SharePoint Server.

o *Enterprise Vault File Governance* – offers comprehensive archiving support for Windows file systems. The solution also supports classification, and integrates with Veritas Data Insight to enable customers to perform archiving operations directly from Data Insight reports.

o *Enterprise Vault Extensions* – provides a framework to which Veritas Technology Ecosystem (VTE) partners may develop custom archiving applications for information not natively archived by Enterprise Vault, such as social media, SMS Text, UNIX, Linux file systems and more.

o *Enterprise Vault Archive Discovery* – is a search and eDiscovery solution that works with Enterprise Vault to expedite the identification, legal hold, and review. Enterprise Vault is also tightly integrated with Veritas eDiscovery Platform for customers who require additional eDiscovery litigation support for content outside the archive.

o *Enterprise Vault Supervision* – provides compliance supervision capabilities to help organizations monitor electronic communications, such as email, instant messaging or social media content.

- **Veritas Enterprise Vault.cloud** – is a cloud archiving service, which offers archiving of both cloud-based or on-premises email, Microsoft SharePoint content, Instant Messaging (IM), cloud file sharing systems, and more. In 2018, Veritas completed the migration of existing customers from proprietary Veritas data centers to Microsoft Azure, which allows customers to have fast access to their data close to their locations around the world. Enterprise Vault.cloud has also added classification to accelerate discovery and end-user search. The Veritas Enterprise Vault.cloud product portfolio includes:

o *Enterprise Vault.cloud for Microsoft Office 365* – archiving and eDiscovery capabilities for Microsoft Office 365. End user access can also be enabled and folder structures synchronized from the mailbox to the archive, thus providing end users a folder structure view of their archived items.

o *Enterprise Vault.cloud for Google G Suite Enterprise* – archiving and eDiscovery capabilities for Google G Suite. Enterprise Vault.cloud journals all Google G Suite email.

o *Enterprise Vault.cloud for Microsoft Exchange* – Enterprise Vault.cloud leverages the native journaling capabilities of Microsoft Exchange Server to capture all emails and attachments sent and received in their original format into a single, online repository specifically created for each customer. Enterprise Vault.cloud supports Microsoft Exchange Server and allows end user access to personal archives via Microsoft Outlook.

o *Enterprise Vault.cloud for Domino* – offers a similar journal archiving feature set to Enterprise Vault.cloud for Microsoft Exchange Server but for Domino environments. It allows end user access to personal archives via Notes.

o *AdvisorMail* – is a supervisory solution that helps organizations monitor email. It provides a framework to select and sample target content and enable authorized staff to review, annotate and escalate items. The process is tracked and recorded for auditing and regulatory compliance purposes.

o *File archiving* – Enterprise Vault.cloud provides file archiving capabilities for documents stored in Microsoft SharePoint document libraries and Box.

o *Collaborative eDiscovery workflow* – Enterprise Vault.cloud offers a built-in collaborative eDiscovery workflow, which allows multiple reviewers to interact and collaborate on a specific matter as part of the eDiscovery process.

o *Mobile Web Access* – Enterprise Vault.cloud offers Mobile Web Access for Enterprise Vault Personal.cloud, which supports browser access from iOS, and Android devices.

STRENGTHS

- Veritas' archiving solutions offer a thorough product portfolio to help organizations satisfy most archiving and information governance needs. Veritas appeals to a wide range of businesses by providing both on-premises and cloud services.

- Veritas solutions help organizations make context-based information governance decisions through advanced classification capabilities. The vendor offers an enhanced classification engine for Enterprise Vault, Veritas Data Insight, Veritas eDiscovery Platform, as well as within EV.cloud.

- In addition to Microsoft Office 365 and Google G Suite archiving, Enterprise Vault and Enterprise Vault.cloud capture over 80 other content sources through native and partner solutions.

- Enterprise Vault and Enterprise Vault.cloud, both archive commonly used electronic communication tools, including Microsoft Exchange Server, Microsoft Office 365, Domino, and Microsoft SharePoint. Enterprise Vault also archives on-premises data sources such as file systems, attachments in SAP databases, and metadata for video and audio.

WEAKNESSES

- With a powerful set of features, Enterprise Vault typically requires an adequate budget and personnel in order to fully maximize the platform's potential. However, managed services are available and some Veritas partners offer hosted Enterprise Vault on Azure.

- While Veritas offers an impressive set of features in both its on-premises Enterprise Vault and cloud-based Enterprise Vault.cloud offerings, it does not provide a common user or administrative experience across the two product lines. Veritas is addressing this by offering a common classification interface for both products, with further integration on the roadmap for 2019.

- Customers should note that File Archiving is only natively supported in Enterprise Vault on premise.

- Veritas supports mobile access to its archives (both Enterprise Vault and Enterprise Vault.cloud) through mobile web browsers, rather than through mobile apps.

MIMECAST

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UK
www.mimecast.com

Mimecast is a provider of cloud-based email and information management services for businesses. The core of Mimecast's services includes: email, IM and file archiving, email security, email continuity, and more. Founded in 2003, Mimecast is headquartered in London, UK, with North American headquarters in Lexington, MA and offices globally. Mimecast is a publicly traded company.

SOLUTION

Mimecast offers a suite of fully integrated cloud **Enterprise Information Archiving**, **Email Security, Protection** and **Continuity** services. Mimecast's services support all major email platforms, but are optimized for Microsoft Exchange Server and Microsoft Office 365.

- **Mimecast Cloud Archive** is a cloud-based email archiving service that captures and indexes Microsoft Exchange Server and Microsoft Office 365 data, as well as data on other major email platforms. Key features of Mimecast Cloud Archive include:

  o Messages are captured at the gateway in real time and via Microsoft Exchange Server journaling to archive all incoming and outgoing messages.

  o Direct end-user access to Mimecast personal archive through an add-on deployed into Microsoft Outlook that provides a seamless user experience for simplified administration, streamlined collaboration, information access and productivity.

  o Users can also access their personal archive through Mimecast's Personal Portal web client, or through native applications for each of the major smart-phone platforms; users

can search, view, reply, and forward archived messages on iPhone, iPad, Android, BlackBerry and Windows Phone devices.

o   Comprehensive compliance, eDiscovery and litigation support including legal hold, case management, data export, and review capabilities.

o   Mimecast also offers add-on services that include integrated large file send, secure messaging, and Sync & Recover for backup and recovery of the Microsoft Exchange Server mailbox folder structure in the Mimecast personal archive, which is accessible from Microsoft Outlook, Mimecast Personal Portal, mobile devices, and Mimecast for Mac.

- **File Archiving** – a cloud-based archiving service that provides archiving of file repositories and data. Key features include:

o   Archiving files from OneDrive, file shares and network shares.

o   Administrator archive search for file data.

- **Skype for Business Archiving** – a cloud-based archiving service, that provides archiving of Microsoft Teams (formerly Skype for Business) conversations. Key features include:

o   Archiving peer-to-peer conversations, conferences and multi-party conversations.

o   A single archive search interface, which delivers IM search results, alongside email and file content for greater context and streamlined administration.

STRENGTHS

- The single Administration console provides unified access to all features in a single view. Security, Archiving, eDiscovery, recovery, email retention policy settings, user management, and litigation hold requests, can all be managed through a single web interface.

- Integration of Security, Archiving, Protection and Continuity means archives are fully accessible even during email outages and archived data remains fully protected against email-borne threats.

- Users can search and access their personal archives from Microsoft Outlook or through Mimecast's Mac app, web interface, and mobile devices, backed by aggressive search SLAs.

- Mimecast supports legal holds, case review and eDiscovery searches, each across an unlimited number of mailboxes.

- Mimecast allows legal holds on specific sets of emails, within or across mailboxes, based on tagging or filters.

- Mimecast offers archiving support for all popular cloud messaging platforms, including Microsoft Office 365 and Google G Suite.

WEAKNESSES

- Mimecast only offers IM archiving support for Microsoft Teams (formerly Skype for Business). Archiving of other IM services as well as social media can be handled through third-party content capture solutions, such as Globalnet.

- Website archiving is currently not supported.

- Mimecast does not currently support archiving of Microsoft SharePoint data.

- Mimecast archiving services are available only as a cloud service. Customers interested in on-premises or hybrid deployments for archiving will need to consider alternative vendors.

SMARSH

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Smarsh, founded in 2001, is a provider of archiving technology and services aimed at highly regulated industries with strict compliance and eDiscovery requirements, such as financial services (e.g. broker-dealers, investment advisers, banks and lenders) and the public sector.

Smarsh merged with Actiance (provider of compliance, archiving and analytics) in 2018, and the combined company operates under the Smarsh brand.

SOLUTION

In 2018, Smarsh introduced the **Connected Suite**, which leverages both Smarsh and Actiance technologies. The suite is comprised of the following components:

- **Connected Capture** – enables customers to capture more than 80 channels of electronic communications (including email, IM/collaboration, social media, mobile/text messaging and voice) for ingestion into the search-ready **Connected Archive,** or other existing archives. Content is captured continuously, in native format, directly from source channels with full conversational context preserved.

- **Connected Archive** – provides ingestion, search, review, reporting and export capabilities universally across all supported content types. It is available as a multi-tenant cloud service, or as a private single-tenant cloud deployment. Smarsh automatically scans content as it enters the archive for keywords, phrases, or violations based on policies defined by each customer. Administrators can customize policies based on any criteria associated with a message. Smarsh provides numerous policy templates created and maintained by compliance and regulatory experts.

- **Connected Apps** – integrate directly with the Connected Archive. *Supervision* enables policy-driven monitoring and team-based content review for financial firms and others in highly regulated industries that need to regularly monitor archived content for regulatory compliance. It is designed to enable policy-driven monitoring and team-based content review. *Discovery* allows content to be organized into cases for further analysis, export or production for eDiscovery, investigations, or audits. A *Control* App provides channel-specific feature sets (i.e. data-leak prevention) enabling customers to establish and enforce usage policies and take action on content as needed.

All content and attachments are available immediately through the Connected Archive web-based interface. Archived content is replicated for continued access in the event of a disaster or system failure, and preserved in accordance with client retention schedules. The Smarsh service includes performance and uptime guarantees.

The platform provides support for the following message types:

o *Email* – Smarsh is platform-agnostic and captures and preserves email messages from on-premises email servers (Microsoft Exchange, IBM Domino and others) and cloud-based email services (e.g. Google G Suite, Microsoft Office 365, Salesforce email and others).

o *Instant Messaging/Collaboration* – Smarsh offers archiving support for public, enterprise and third-party messaging applications and collaboration platforms, including Microsoft Teams, Slack, Workplace by Facebook, WebEx Teams, Bloomberg, Thomson Reuters, Ice/YellowJacket, QQ Messenger, Pivot, Cisco Unified Communications, Jabber, FactSet, Symphony, and others. Smarsh works directly with these platforms to ingest data directly through API connections (where applicable).

o *Social Media* – Smarsh provides archiving support for Facebook, Twitter, LinkedIn, Microsoft Yammer, Salesforce Chatter, Jive, Instagram, Pinterest, YouTube, Vimeo and more. Smarsh works directly with several of these platforms to ingest data directly through API connections.

o *Websites* – businesses can capture, search, preserve, produce, and supervise complete websites, individual web pages, blogs, wikis, RSS feeds, audio and video files, and the interactive components that create web pages.

o *Mobile Messaging* – Smarsh captures, indexes, and preserves SMS/MMS text messages and other forms of mobile communications across Android, Apple and BlackBerry devices. Smarsh focuses on capturing content directly from carriers (e.g. AT&T, Verizon, Vodafone, Rogers, U.S. Cellular), and provides mobile archiving solutions regardless of mobile operating system, carrier or device ownership scenario (i.e. BYOD vs. corporate-issued). Larger mobile archiving customers can also deploy the service on-premises, or store data via AWS (GovCloud).

Smarsh also offers a suite of **Business solutions**, powered by Intermedia, which includes email encryption, email hosting, instant messaging, backup and file sharing and productivity apps.

STRENGTHS

- Smarsh provides archiving support for a broad range of enterprise content, including: email, social media, IM, mobile messaging, websites, video, voice and more. Users can leverage a uniform set of policies and a unified search interface across all of their content types.

- Smarsh provides archiving support for popular enterprise social and/or collaboration services, including Slack, Microsoft Teams, Workplace by Facebook, Salesforce Chatter and Yammer.

- Smarsh offers mobile/text archiving, with support for archiving of content directly from carriers. The Smarsh mobile archiving portfolio offers solutions for any combination of mobile device/OS, carrier/plan and ownership model (e.g. employer-issued, bring-your-own-device, or choose-your-own-device).

- Messages are ingested, indexed and retained in their native format (as opposed to having non-email content converted to email). This enables the preservation of rich, conversational context, as well as fast search and review by the unique elements and objects of each message type.

- Smarsh provides multiple APIs, including for content ingestion, and offers a developer program for third-party content support and client custom development.

- Following the Actiance integration, Smarsh is well-positioned to provide capture, archiving and supervision product/service engagements for customers all sizes, ranging from single-office broker-dealers to large enterprises.

WEAKNESSES

- Smarsh has traditionally focused on providing archiving solutions for the financial services industry. The company is, however, gaining traction in other verticals.

- Smarsh allows access to personal archives through mobile device browsers, however, it does not currently offer mobile archiving apps.

- Smarsh is localized only in English, however, all messages are stored in their native format and Unicode messages are archived.

SPECIALISTS

OPENTEXT

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OpenText, founded in 1991, offers solutions for Enterprise Information Management (EIM), which provide the ability to manage structured and unstructured information flow in support of Customer Experience Management (CEM), Business Network (BN), Business Process Management (BPM), Enterprise Content Management (ECM), eDiscovery, Analytics, and more. OpenText is a publicly traded company.

SOLUTION

OpenText information archiving solutions support enterprise archiving of email, documents, file data, and transactional data to handle a variety of archiving scenarios including compliance, and legacy application archiving and retirement. OpenText's approach to archiving is to make archived content immediately available within the user's application of choice, whether CRM, ERP, HRM, a marketing automation system, productivity software or any application they use to support their work. OpenText archiving solutions are available in a variety of deployment models including: on premises, private cloud, SaaS cloud, hybrid cloud, and support the ability to use extended cloud storage.

The OpenText portfolio comprises the following key solutions:

- **OpenText Archive Center** – addresses the SAP market for standalone, on-premises and SaaS archiving. It runs in the OpenText Cloud as a public cloud service.

- **OpenText InfoArchive** – is an optimized solution for archiving both structured and unstructured information. It includes Retention management, Holds, Encryption, Masking and Audit. It is an open platform built to support legacy decommissioning, active archiving, and long-term compliance, as well as to help reduce storage, application load, and backup costs. InfoArchive provides a holdings wizard, which improves pre-ingestion preparation for application data and content. In addition, OpenText provides a number of accelerated integration configurations with other products such OpenText Integration Center (OTIC) and OpenText File Intelligence to address focused solutions and vertical application deployments.

- **OpenText Content Suite archiving solutions** – provides a foundation of Enterprise Content Management (ECM), Records Management, Archiving and integrations for capture. It includes solutions for Email Management for Microsoft Exchange, Microsoft Office 365, Google Gmail, IBM Notes, Microsoft SharePoint, and File System Archiving. The solution can automatically apply or allow end users to apply records management classifications for retention and disposition purposes. In addition, ECM provides comprehensive search and litigation hold, along with a variety of different ways of using and accessing content within the archive. Content Suite can also provide access to SAP archived content.

STRENGTHS

- OpenText provides a variety of deployment options including on-premises, private cloud, SaaS cloud, and hybrid.

- OpenText provides a strong portfolio of Enterprise Information Management (EIM) solutions that tightly integrate with their information archiving solutions.

- All OpenText solutions are built for compliance and provide full support for litigation and regulatory audits. InfoArchive offers regulatory compliance where accessibility and reporting across transactional and content records is required.

- OpenText InfoArchive and Archive Center offer out-of-the-box support for rich search for eDiscovery, including capabilities for indexing, legal hold, ESI preservation, chain of custody, production sets, audits and search technologies.

- OpenText archiving solutions provide the flexibility to archive and apply various retention or records management policies to a broad range of structured and unstructured content types. OpenText builds on OpenText Archive Center to provide a compliant repository for file content combined with the structured data capabilities of InfoArchive.

WEAKNESSES

- OpenText's archiving solutions tend to be best suited to customers that require strong integration into an Enterprise Information Management (EIM) suite. InfoArchive, however, is a simpler solution aimed at legacy application de-commissioning, and basic information retention requirements.

- OpenText's user interfaces for searching could be simplified and made more uniform across all data types.

- OpenText only provides website archiving for its OpenText Web Experience Management (WEM) solution.

- OpenText provides mobile access to archived information for users through their mobile browsers, and administrators through an Outlook on the web (formerly OWA) interface. Currently, only the InfoArchive solution provides access through mobile apps.

- OpenText offers a varied portfolio of information archiving solutions aimed at different use cases, which overlap in functionality while not always addressing all enterprise needs. This may not be appealing for customers with mixed use cases, who wish to deploy a standard set of information retention policies.

JATHEON

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Founded in 2004, Jatheon Technologies offers email, social media and mobile archiving solutions for compliance and eDiscovery with a strong focus on highly regulated industries such as government, finance, healthcare, education and legal. The company is privately held.

Solutions

Jatheon offers on-premise and cloud-based archiving solutions for capturing, indexing, long-term storage, management, retrieval and dynamic monitoring of corporate email and messaging data. The solutions are compatible with all major email platforms, such as Microsoft Exchange, Microsoft Office 365, Google G Suite, GroupWise, IBM Notes/Domino, and others.

- **Jatheon Archiving Suite** is an on-premises email archiving product plus service package that consists of:

  o **Jatheon cCore** – an enterprise-grade, scalable and expandable archiving appliance which is the company's flagship product. It offers data processing, archival and management software suited to the needs of organizations of all sizes. It is email platform-agnostic, and includes sophisticated search capabilities, an improved interface and a level of granularity suitable for eDiscovery.

  o **Jatheon Care** – is a comprehensive customer service and support plan which includes: 24/7 dynamic system monitoring; technical support; free hardware maintenance and software updates; free hardware refresh every 4 years; free legacy data importing and migration; assistance with data backup; as well as training and documentation.

  In addition, Jatheon offers the following add-ons for its on-premises setup:

  o **Jatheon CTRL** – a social media, SMS, MMS, phone calls, video, voicemail and instant message archiving add-on that integrates with Jatheon's email archiving software. It is compatible with all major social media platforms, such as Facebook, Twitter, LinkedIn,

YouTube, Instagram and others. It allows users to search social media posts, mobile calls, text messages, MMS and voicemail using a large number of search criteria (From, To, Message Content, Message Subject, Comment, Notification, Status/Tweet/Post, Attachment, Conversation, and more). Custom retention and expunge policies can be applied to the archived content, which can also be monitored for keywords. Non-compliant and risky messages can be identified, flagged and reviewed. Options such as legal hold or export to PST are provided in support of eDiscovery.

- o **Jatheon Cloud Backup** – data captured by Jatheon cCore can be mirrored to Jatheon's Cloud Backup for additional safety and easier disaster recovery.

- o **Jatheon Xpand** – Jatheon's expansion units offer an easy and cost-effective way to add more storage without purchasing an entire new archiving appliance.

- o **Jatheon DR** – A secondary disaster recovery appliance where data is replicated from the archive appliance for added security.

- **Jatheon Cloud** – is a cloud-based email archiving platform that automatically captures and indexes all incoming, outgoing and internal messages, checks them against user-defined rules and stores them for future search and easy retrieval. Jatheon Cloud is email platform agnostic and has sophisticated search capabilities.

In addition, Jatheon Archiving Suite and Jatheon Cloud both offer the following key features:

- o *Comprehensive Indexing and Archiving* – the ability to capture and archive legacy and current content together with metadata. Jatheon's solution offers support for various content types, including email, all major social media platforms, mobile messages, phone calls, voicemail and video.

- o *Role-Based Access to Data* – end user access to their personal archive enables employees to easily search and locate specific messages. Members of staff with special permissions (e.g. compliance officers/admins) can easily create custom policies to control message retention as well as view and search through other people's messages.

o *Comprehensive Search* – available via a secure web-based interface or through an integrated Microsoft Outlook Plugin, it offers enterprise search functionality with full Boolean support, wildcard searches, and the ability to search through attachments.

o *Regulatory Compliance* – compliance with a variety of government, state and industry regulations and regulatory bodies in the United States, Canada, Australia and Europe, including SOX, GLBA, NARA, HIPAA, FERPA, FISMA, FINRA, FOIA, SEC, GDPR, and others.

o *eDiscovery Features* – such as advanced search, legal hold, audit trail, customizable policies, saved searches and other features which allow organizations to produce evidence for litigation quickly and efficiently.

o *Proprietary Self-Healing Storage Technology* – prevents damage caused by deterioration of magnetic disks and contains bit rot proof for long-term data protection.

o *Storage Optimization Features* – include deduplication, single-instance storage (of attachments) and compression to reduce information footprint and increase data efficiency.

o *Support for Multiple Formats* – supports importing, exporting and backup to Portable Document File (PDF), Personal Storage Table (PST), MIME RFC 822 (EML) and Notes Storage Facility (NSF) formats.

Strengths

● Jatheon's solutions are fully platform-agnostic, compatible with all major email clients and provide archiving support for a broad range of messaging and social media content.

● Jatheon's on-premises solutions offers enhanced security with expandable, enterprise-grade hardware on all appliance models.

● Jatheon solutions are easy to deploy and manage, and offer predictable pricing designed to appeal to organizations of all sizes across all industries.

● Jatheon offers all-in-one solutions that can retain various types of unstructured data (e.g. email, social media, IM, and mobile).

- Jatheon can import data from all legacy systems in PST and EML formats, and export to PST, EML and PDF.

Weaknesses

- Jatheon's solutions are not currently available in virtual appliance form.

- Jatheon does not currently archive Microsoft SharePoint content.

- Jatheon does not currently offer a mobile app for archive access.

- Jatheon solutions are currently localized only in English.

MICROSOFT

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Microsoft delivers products and services to businesses and consumers through an extensive product portfolio that includes solutions for office productivity, messaging, collaboration, and more.

SOLUTION

Microsoft offers native archiving functionality: on-premises, through deployments of Microsoft Exchange Server (i.e. 2010, 2013, 2016); cloud-based, through Microsoft Office 365; or as a stand-alone cloud solution, called Exchange Online Archiving, for cloud or on-premises customers. All Microsoft archiving solutions meet SEC Rule 17a-4 requirements.

- **Microsoft Exchange Server** and **Microsoft Office 365** – offer native archiving and compliance features, referred to as In-Place Archiving, which include:

  o *Personal Archive* – the Personal Archive feature is a specialized mailbox that integrates with a user's primary mailbox. Users can access the Personal Archive through Microsoft

Outlook or Outlook on the web (formerly Outlook Web App). Email messages can be archived manually or automatically based on policies created by administrators. Office 365 offers unlimited archiving (also called auto-expanding archiving) where when a user's initial storage quota is reached Office 365 automatically increases the size of the archive, without the need for user or administrator intervention.

o *Retention Policies* – retention policies can be defined to dispose of email messages after a defined period of time. Microsoft Exchange Server utilizes retention tags to classify each email message. This process is fully automated. Data retention policies can apply to the entire organization, specific locations or users. When content is subject to a retention policy, users can continue to edit and work with the content because it is retained in place. If users edit or delete content that is subject to a retention policy, a copy is retained to a secure location while the policy is in effect. In addition, in order to comply with regulations such as SEC Rule 17a-4, which require that after a retention policy is turned on it cannot be turned off or made less restrictive, Microsoft supports Preservation Lock which means that after a policy is locked no one, not even administrators can change or turn it off.

o *Multi-mailbox Search* – enables searches across a broad range of mailbox items, including: mail, attachments, calendar appointments, tasks, and contacts. Multi-mailbox can search simultaneously across mailboxes, Personal Archives, and recovered items from the web-based console. In Office 365 a Content Search tool is provided through the Security & Compliance Center which allows to quickly find email in Exchange mailboxes, documents in SharePoint and OneDrive, and conversations in Teams/Skype of Business.

o *In-Place Hold* and *Litigation Hold* – In-Place Hold allows users to search and preserve messages matching specified query parameters. Litigation Hold preserves all mailbox content. Both protect messages from deletion, modification, and tampering. Messages can be preserved indefinitely, or for a specified time period. Administrators can place specific mailboxes on litigation hold during a pending or ongoing legal investigation. The Litigation Hold process is transparent to end users.

o *Importing Historical Data* – historical email data from PSTs can be imported directly into Microsoft Exchange Server.

o *In-Place Discovery* – enables authorized users to perform federated searches across Microsoft SharePoint and SharePoint Online websites, documents, file shares indexed by Microsoft SharePoint, mailbox content in Microsoft Exchange Server, and archived Teams/Microsoft Skype for Business content. Office 365 provides eDiscovery tools in the Security & Compliance Center. Organizations can set up eDiscovery cases to control who can create, access and manage eDiscovery cases. The Content Search tool can be used to search locations on hold for content that might respond to cases, as well as export and download results for further investigation by external reviewers. Organizations with the Office 365 E5 subscription can also prepare search results for analysis in Advanced eDiscovery, which supports text analytics, machine learning and predictive coding to process vast quantities of data to identify items that are relevant to a specific case.

o *Archiving third-party data* – Office 365 supports the import and archiving of third-party data from social media platforms (e.g. LinkedIn, Facebook, Twitter, Yammer), Instant Messaging (e.g. Cisco Jabber and others), document collaboration (e.g. Box, DropBox), SMS/text messaging (e.g. BlackBerry), and vertical industry applications (e.g. Salesforce Chatter, Thomson Reuters, Bloomberg). Customers, however, must work with Microsoft partners to deploy and configure connectors that will extract items from the third-party data source and import into Office 365.

- **Exchange Online Archiving** – provides the option of cloud-based archiving for customers that have deployed Microsoft Exchange Server on-premises. Microsoft Exchange Online Archive includes:

o *Retention Policies* – email messages can be automatically moved to the personal archive in a specified number of days and deleted after another span of days.

o *In-Place Hold* and *Litigation Hold* – enables users to delete and edit mailbox items (including email messages, appointments, and tasks) from both their primary mailboxes and archives, while the items are still captured by the hold thus preserving immutability. Administrators can setup legal holds on individual users or across an organization.

o *Instant Messaging Archiving* – Microsoft Exchange Online Archive can archive on-premises Microsoft Teams (formerly Skype for Business) content. IM conversations can be stored in a user's mailbox and then sent to their personal archive.

- o *Access to the Service* – users and administrators can access Microsoft Exchange Online Archiving from the Microsoft Outlook email client, or online through Outlook on the web.

- o *Customization* – Microsoft Exchange Online Archiving comes with a number of customized reports to establish an audit trail of any inquiry.

- o *Service Level Agreements* – Microsoft guarantees 99.9% scheduled uptime.

STRENGTHS

- Archiving comes as a native feature of Microsoft Exchange Server (2010, 2013 and 2016) and Microsoft Office 365, which helps streamline integration between the archiving platform, archive content, and user access.

- Microsoft Office 365 offers a consistent set of native information archiving, search and eDiscovery capabilities across email, SharePoint, OneDrive, and Teams/Skype for Business, which is a valuable investment for organizations vested in these technologies.

- Microsoft archiving is available as an on-premises solution, cloud service, or a hybrid solution (for instance customers of on-premises Exchange can deploy Microsoft Online Archiving for cloud based archiving).

- Microsoft's on-premises Exchange Server archiving and cloud-based Microsoft Online Archiving, both support archival of Microsoft SharePoint and Microsoft Teams (formerly Skype for Business) content.

- The tight integration between In-Place Holds and In-Place Discovery features allows users to simultaneously search and place holds on content within the same interface and query.

- For basic eDiscovery, Microsoft's legal hold feature prevents data from being deleted or edited during an internal or external investigation. Customers with the Office 365 E5 subscription, can also leverage Advanced eDiscovery, which uses machine learning and predictive coding, to help process vast quantities of data relevant to a specific case.

WEAKNESSES

- For on-premises deployments, Microsoft Exchange Server does not offer single instance storage (i.e. de-duplication), instead it keeps multiple copies of email messages and attachments. This requires an increase in storage capacity and can affect Microsoft Exchange Server's backup and restore capabilities.

- Microsoft archiving is highly Microsoft-centric and does not provide support for non-Microsoft email platforms.

- Microsoft has added support for archiving of third-party content data in Office 365, however, this is not provided through native connectors, but rather it must be handled through third-party integrations performed by Microsoft partners.

- Microsoft archiving allows archived data to be accessed by IT administrators, however, support for end user access to their personal content archive is available only through each separate application (e.g. Outlook and Outlook on the web for email content).

- Customers we spoke to as part of this research, typically indicated that they value Microsoft's native archiving and retention capabilities as a good starting point for their information retention strategies, but they typically also deploy additional archiving solutions from best-of-breed vendors.

BARRACUDA NETWORKS

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Barracuda Networks, founded in 2003, provides security, archiving and storage solutions. In November 2017, Barracuda acquired Sonian, a public cloud information archiving company, which provides a service for OEM partners, and their end customers. Barracuda Networks was acquired in February 2018 by private equity firm Thoma Bravo in a move that took the company private.

SOLUTIONS

Barracuda offers the following appliance based and SaaS archiving solutions:

- **Barracuda Message Archiver** – is an appliance-based archiving solution for email and other message content. It is available as an on-premises appliance or a virtual appliance, and can be deployed in private or public clouds, including Amazon AWS.

- **Barracuda Cloud Archiving Service** – is a SaaS solution which uses the Barracuda Cloud to deliver a cloud based archiving service. It is hosted and managed by Barracuda in their own datacenters, and does not require additional on-premises customer hardware or software. The service is also a central component of the **Barracuda Essentials** suite of cloud services, which is aimed at organizations moving to cloud based solutions, such as Microsoft Office 365 and Google G Suite.

Key features of Barracuda archiving solutions include:

o *Comprehensive Archiving* – allows both current and historical email data to be captured and archived, with support for non-email content enabling customers to also archive messages, appointments, contacts, notes, tasks and IM conversations.

o *End User Access* – users have full access to their archives at any time from any device, with folder replication providing a seamless experience. An Outlook Plug-in provides fully integrated access to archived data from the desktop alongside email, and data can be cached to provide ongoing access when offline. Native apps for iOS and Android provide anytime/anywhere mobile access to archived data. A dedicated web client interface is also available.

o *Archive Management* – role-based administration provides user-level access controls, with configurable granular permissions provided for managing auditor access to data. Violations of message policies are reported, and the Message Archiver also provides comprehensive real-time reports and statistics on data volume, traffic, and storage utilization.

o *Compliance* – SMTP Journal Capture ensures an accurate and unmodified copy of every email sent or received, including details of all recipients. Email is captured without opportunity for amendment or deletion. Granular data retention policies can be customized to

meet complex regulatory or business requirements, and a comprehensive audit trail ensures that a full record of all system activities can be provided to demonstrate compliance.

o *eDiscovery* – multi-level full text searches can be conducted on all message content and attachments as well as message header fields, tags and metadata fields. Search criteria can be saved for future use, and search results can be tagged for future identification, or placed on legal hold if needed. Relevant data can be exported as needed for further processing.

o *Storage Management (Barracuda Message Archiver)* – uses message stubbing to remove archived content from Exchange whilst retaining full access for the end user. Messages and attachments are de-duplicated using Barracuda's single-instance storage technology, and then compressed to maximize archive storage efficiency.

o *PST Management* – Barracuda PST Enterprise is available as an option, and provides an advanced capability for IT Administrators to discover and manage PST files throughout their organization.

Sonian offers the following cloud archiving solution:

• **Sonian Email Archiving** –allows companies to preserve, analyze and access their electronic communications for legal, regulatory and continuity purposes while gaining organizational insights. Customer organizations can archive, index and search their email, including more than 500 different attachment types, as well as Teams (formerly Microsoft Skype for Business) messages. Sonian offers unlimited storage and unlimited retention at low and predictable costs. Sonian's archive is offered in leading cloud ecosystems (e.g. AWS, Azure, IBM SoftLayer, and more). Key features of Sonian's Email Archiving solution include:

o *Data preservation* – Sonian automatically preserves all incoming and outgoing emails and attachments into its secure cloud archive. Data is encrypted both in transit and at rest using AES 256 cypher-strength encryption. This persistent, immutable record of discussions, documents and data is highly available, reliable and web accessible.

o *Email Migration* – Sonian's cloud archive makes porting messaging content between platforms easier, with fast migration of legacy email data.

o *Information Discovery* – Sonian's cloud archive can index messages and more than 600 attachment file types, and supports document production in early-stage litigation and/or internal investigations. Users can utilize simple, advanced and wizard-driven search capabilities to locate relevant messages and attachments. Data can be tagged, filtered, and exported in a variety of formats facilitating rapid delivery to third parties during discovery.

o *Legal Hold, Retention Policies and Classification Management* – the Sonian cloud archive allows users to create, apply and manage unlimited hold classifications, and set retention policies specific for their industry.

o *Role-based Access to Data* – Sonian's platform provides granular role-based access to data ensuring only authorized individuals can access specific data sets. The archive also features Active Directory integration, allowing companies to easily map their organizational identities to assets within the archive. Office 365 users can access their archive via Single-Sign-On and user accounts can be easily linked back to Office 365 via Active Directory Sync.

o *Communications Insights* – Sonian's cloud archive also features an analytics dashboard, which proactively delivers security insights, analyzing data in email communications and attachments. It highlights unusual activity, and flags messages which may present a risk of security breaches, intellectual property loss or compliance violations.

STRENGTHS

- Barracuda products are easy to purchase and easy to deploy, with simple per-user or per-appliance pricing and no additional charges.

- The Barracuda Cloud Archiving Service integrates with Microsoft Office 365, Microsoft Exchange, and other email services to provide a complete cloud-based archive with no additional customer hardware or software required.

- The Barracuda Message Archiver can mirror data to the Barracuda Cloud for secure longer-term retention and storage, or to facilitate disaster recovery.

- Barracuda provides multiple user interface options, including companion applications for Window and macOS, mobile apps for iOS and Android, an Outlook add-in, and a web interface.

- Sonian's solution was specifically built for rapid cloud deployment which requires no service engagements, and allows it to scale and provide optimized search response times in a cloud environment.

- Sonian offers strong analytics capabilities which help extract knowledge and insights from archived communications data to help IT and legal users, proactively achieve risk mitigation through the enforcement of data governance, compliance and corporate policies.

- Sonian has a well-established MSP partner reseller ecosystem that delivers its solutions to end customers.

WEAKNESSES

- Barracuda offers limited archiving support for enterprise social media services, however, customers can use Barracuda Web Filter in conjunction with Barracuda Message Archiver, to archive social media services, such as Twitter and Facebook.

- Barracuda does not archive Microsoft SharePoint or website content.

- Sonian's principal content sources are currently emails and attachments. Additional content types, such as Slack, Teams (formerly Skype for Business) as well as the ability to support images, video, and audio are on the vendor's future roadmap.

- Sonian does not archive Microsoft SharePoint, or website content.

- Sonian currently offers browser-based access to content. However, access through a mobile app is on the vendor's near-term roadmap.

- Sonian is currently localized only in English, however, localization in other languages is under development.

GOOGLE

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Google, founded in 1998, is an Internet company well known for its search and online advertising services. G Suite is Google's business productivity suite that includes services for email, collaboration, and productivity. Google is a publicly traded company.

SOLUTION

Google G Suite includes **Google Vault**, its own web-based archiving, information governance, and eDiscovery solution, which works natively within G Suite and is built on the same infrastructure as the G Suite platform.

Currently, Vault supports search, export, retention and legal holds for Gmail, chats in Classic Hangouts, Hangouts Chat and Hangouts Meet, Google Drive (including Team Drives) and Google Groups.

Key features of Google Vault include:

- *Archiving & Retention* – Vault provides a single archive where email and chat messages, as well as Google Drive files are managed in-place. This includes email messages in Google Groups as well as files in Drive (including Team Drives). Audit trails provide reports on user activity and actions in the archive. Businesses can define retention policies for email, documents and other supported content.

- *eDiscovery* – search tools enable the finding and retrieval of all email, chat messages, and Google Drive files relevant to a particular case or investigation. Vault includes Google search algorithms for domain wide searches across large amounts of email. Search queries can be defined and saved for future use by authorized users. Messages and documents can be exported for further review and processing. Legal holds can be placed on users to prevent the deletion of email, documents and other content.

- *Security* – security features of Vault include access controls, encrypted connection to Google's servers, replicated storage for messages, and built-in disaster recovery and sharing

controls.

STRENGTHS

- Google Vault provides a familiar interface for current G Suite users. Google Vault is easily deployed and managed in conjunction with other G Suite services.

- Google Vault enables administrators to apply retention and preservation policies to mail and chat content, as well as to Google Drive files. Indefinite retention periods are also supported within Google Vault. Administrators can also place user accounts and related email, chat data, documents and other content on hold.

- Google Vault provides search and export functionality for email, chats, and documents. Search results can be exported and provided to a third-party.

- Vault offers manage-in-place capabilities by applying retention policies directly to the G Suite data, without the need to move, export, or create a copy of data in a separate location.

- As part of the G Suite platform, the Google Vault interface is localized in various languages, and Vault supports content from many more languages.

WEAKNESSES

- Google Vault does not currently integrate with all G Suite services. However, Google is working to address this in future releases.

- Google Vault allows archived data to be accessed by Vault administrators, however, support for end user access to their personal content archive is only available through each separate application (e.g. Gmail for email content).

- Google Vault does not currently offer website archiving. However, archiving of Google Sites is on the roadmap.

- While Google Vault offers eDiscovery capabilities, these are fairly basic at this time and are mostly meant to complement third party eDiscovery solutions.

- Google Vault is aimed at G Suite customers. Organizations with more heterogeneous mail or information content environments will need to invest in a complementary archiving solution or look elsewhere for their archiving needs.

- Google Vault is available only as a cloud service. Customers interested in on-premises or hybrid deployments for archiving will need to consider alternative vendors.

MATURE PLAYERS

PROOFPOINT

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Proofpoint is a next-generation cybersecurity company protecting people, data, and brands from advanced threats and compliance risks. The company delivers solutions for inbound email security, outbound data loss prevention, email encryption, compromised accounts, eDiscovery, and email archiving. Proofpoint is publicly traded.

SOLUTION

Proofpoint Enterprise Archive is a cloud service that provides information archiving, eDiscovery, and regulatory compliance for on-premises Microsoft Exchange Server and Microsoft Office 365. An optional appliance can be deployed in the customer's data center and encrypts information before it leaves their premises, and then sends in encrypted format to the Proofpoint Datacenters for additional security. Key features of Proofpoint Enterprise Archive include:

o *Message Retention* – Proofpoint Enterprise Archive offers tight integration with Microsoft Exchange Server and Microsoft Active Directory. Email messages are captured from a Microsoft Exchange Server journaling mailbox at configurable time intervals. An automated stubbing feature removes email attachments from Microsoft Exchange Server, while still making them available to users through the Microsoft Outlook client, in order to preserve storage space and minimize user creation of PST files. The Proofpoint DoubleBlind Key

Architecture provides security for messages routed to Proofpoint datacenters, as well as messages and index at rest. Messages are encrypted on the optional Proofpoint appliance on-premises and can only be decrypted by an authorized user within the network. Proofpoint customers maintain sole possession of encryption keys, which ensures that data privacy is protected. Enterprise Archive can archive email, Bloomberg messages, IM's, social media content and more. Proofpoint also has a Selective Disposition feature, which enables customers to dispose of specific items from the archive prior to the end of the retention period (for example, privileged, sensitive content or to comply with GDPR requests).

o *Legal Hold Management* – during an impending lawsuit, Proofpoint Enterprise Archive allows for the creation and enforcement of legal holds in order to preserve old and new messages, in effect suspending their assigned retention period. These messages are maintained in a tamper-proof repository for the duration of the legal matter, but can be accessed and reported on by authorized members of the legal team through the web-based interface.

o *Advanced Search and eDiscovery Analytics* – Proofpoint Enterprise Archive includes full-text and wildcard-based searches of message headers, message body, and over 500 types of attachments by legal teams and/or administrators. Proofpoint offers a search time guarantee of less than 20 seconds, regardless of how large the archived data store becomes or how complex the query. An integrated optional eDiscovery analytics module is also available for data visualization, predictive coding, conversation threading and hierarchical tagging.

o *Supervisory Review* – for organizations subject to SEC/FINRA compliance requirements, Proofpoint provides full compliance review to allow supervisory review personnel to monitor email for policy adherence. Proofpoint also provides full SEC 17a-4 compliant storage. Intelligent Supervision incorporates easily configurable policies and sampling rules, users are able to assess in the effectiveness of each reviewer and policy through our industry-first real-time dashboard taking automation, intelligent message selection, monitoring, and reporting to greater depths to make reviews more efficient.

o *FISMA Compliance* – Proofpoint provides a FISMA-compliant offering for Federal Government customers.

o *FedRAMP Certification* – Proofpoint's cloud archiving service, including all deployment models, are FedRAMP certified.

Proofpoint also has a stand-alone solution, Enterprise Collaboration Archiving, which provides the ability to natively capture and archive content from several social and enterprise collaboration sources including for instance Facebook, Twitter, LinkedIn, Microsoft Yammer, and SalesForce Chatter, and Jive. Content can be archived in any market leading information archiving repository, as well as in Proofpoint's Enterprise Archive. For archival within Enterprise Archive, Proofpoint provides single pane of glass visibility to all archived content, and can segregate social content through the use of information tags.

Proofpoint Enterprise Archive provides full mobile access for Apple iOS and Android devices. The self-service tool enables users to search their archive to find messages, view message details, and retrieve messages to their inbox.

STRENGTHS

- Intelligent Supervision provides quick and efficient supervision, review and reporting on all correspondence in order to meet FINRA, SEC and IIROC obligations.

- Proofpoint provides advanced eDiscovery capabilities, including: search, legal hold, retention policies, data visualization and predictive coding, natively within Proofpoint Enterprise Archive.

- The optional DoubleBlind Key Architecture ensures that Proofpoint maintains the data but does not have the encryption keys. Messages within the datacenter can only be accessed by authorized users that have the specific encryption key unique to each individual customer.

- Proofpoint Enterprise Archive is capable of archiving email messages, Bloomberg messages, IM's, social media and enterprise collaboration content and files from desktops, file shares and Microsoft SharePoint repositories.

- Proofpoint provides full administrative and end-user multi-language support including double byte languages.

- Proofpoint offers mobile archive access through apps for iOS and Android, as well as an updated web-based user interface designed for tablet devices.

WEAKNESSES

- Proofpoint Enterprise Archive only supports Microsoft Exchange Server or Microsoft Office 365 messaging environments, other messaging platforms such as Google G Suite, or IBM Domino are not supported.

- Website archiving is only available through partner solutions.

- Proofpoint's licensing model is somewhat complex, and customers should check carefully on what capabilities are included or not.

- Proofpoint's DoubleBlind Key Architecture, while highly secure, requires the deployment of an on-premises appliance or a virtualized appliance. For customers seeking a pure cloud solution, Proofpoint offers a fully hosted deployment model with Proofpoint hosting the DoubleBlind Key Architecture in a virtualized appliance.

- Proofpoint is highly focused on its cybersecurity product portfolio, and is not showing significant innovation in its information archiving portfolio.

- Proofpoint is mostly visible in North America, the company has little visibility in other geographies.

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

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Currently Released:

Title	Released	Price*
Social Networking Statistics Report, 2019-2023	Feb. 2019	$3,000.00
Instant Messaging Statistics Report, 2019-2023	Jan. 2019	$3,000.00
Mobile Statistics Report, 2019-2023	Jan. 2019	$3,000.00
Endpoint Security Market, 2018-2022	Nov. 2018	$3,000.00
Secure Email Gateway Market, 2018-2022	Nov. 2018	$3,000.00
Cloud Access Security Broker (CASB) Market, 2018-2022	Nov. 2018	$3,000.00
Enterprise DLP Market, 2018-2022	Nov. 2018	$3,000.00
Microsoft SharePoint Market Analysis, 2018-2022	Jun. 2018	$3,000.00
Corporate Web Security Market, 2018-2022	Jun. 2018	$3,000.00
Email Market, 2018-2022	Jun. 2018	$3,000.00
Office 365, Exchange Server and Outlook Market Analysis, 2018-2022	Jun. 2018	$3,000.00
Cloud Business Email Market, 2018-2022	Jun. 2018	$3,000.00
Information Archiving Market, 2018-2022	Mar. 2018	$3,000.00
Unified Endpoint Management Market, 2018-2022	Mar. 2018	$3,000.00
Advanced Threat Protection Market, 2018-2022	Mar. 2018	$3,000.00

* Discounted by $500 if purchased by credit card.

Upcoming Publications:

Title	To Be Released	Price*
Email Statistics Report, 2019-2023	Mar. 2019	$3,000.00
Unified Endpoint Management Market, 2019-2023	Apr. 2019	$3,000.00
Advanced Threat Protection Market, 2019-2023	Apr. 2019	$3,000.00

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