

February 14, 2008

The Forrester Wave™: Message Archiving Software, Q1 2008

by Barry Murphy

for Information & Knowledge Management Professionals



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Autonomy ZANTAZ And Symantec Lead A Hotly Contested Market

by **Barry Murphy**

with Kyle McNabb and Diana Levitt

EXECUTIVE SUMMARY

In Forrester's 85-criteria evaluation of message archiving software vendors, we found that Autonomy ZANTAZ and Symantec have a tenuous lead over large vendors such as CA, EMC, IBM, and Open Text with broad enterprise content management (ECM) and storage portfolios. Autonomy ZANTAZ and Symantec provide the best set of value-add functionality like eDiscovery support and advanced analytics and search to address customer pain points. Strong Performers like CA, EMC, IBM, and Open Text are building value-add features but marrying them tightly to broader product portfolios that scare some customers into thoughts of vendor lock-in. Hewlett-Packard (HP) is a Contender with an interesting integrated appliance offering focused on providing high levels of scalability, while Quest Software is a Risky Bet, lacking most of the value-add features that customers demand today, including advanced search and analytics, eDiscovery support, and supervision.

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NOTES & RESOURCES

Forrester conducted services evaluations in September 2007 and interviewed eight vendor and user companies: Autonomy ZANTAZ, CA, EMC, IBM, Hewlett-Packard, Open Text, Quest Software, and Symantec.

Related Research Documents

["The Forrester Wave™: Message Archiving Hosted Services, Q1 2008"](#)

February 7, 2008

["Accelerate Your Retention Management Strategy"](#)
December 27, 2007

["Abysmal: The State Of Retention Management"](#)
July 17, 2007

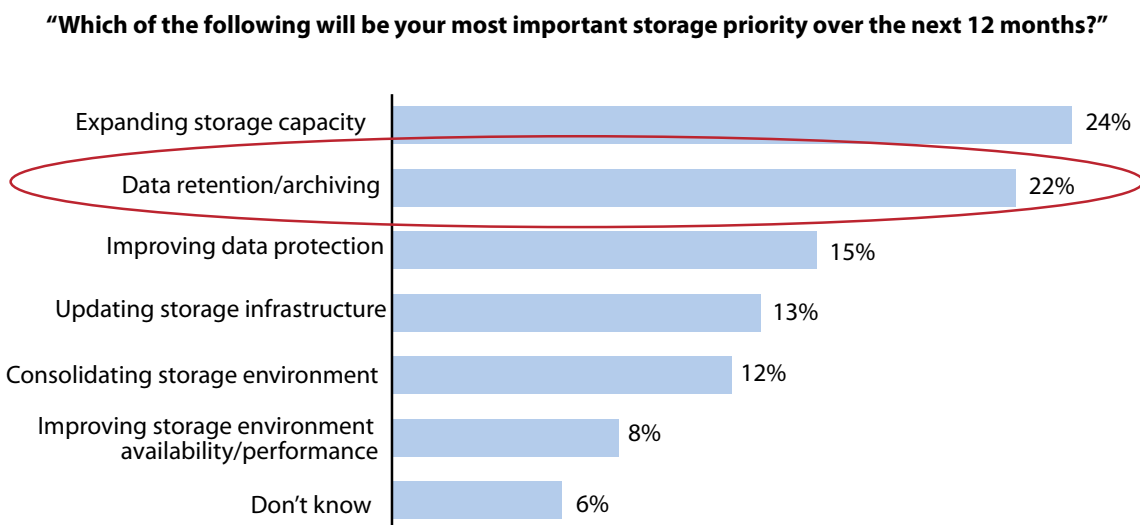
MESSAGE ARCHIVING IS NOW A MAJOR COMPONENT OF RETENTION MANAGEMENT

It's easy for information and knowledge management (I&KM) professionals to dismiss message archiving as a storage-related issue of concern only to infrastructure and operations management (I&O) professionals. Nothing could be further from the truth; in fact, I&KM pros often turn to message archiving tools first when deploying solutions for retention management.¹ Even in the I&O world, data retention/archiving has moved close to the top of the list of storage priorities, outranking traditional concerns like updating infrastructure and improving data protection (see Figure 1).

Message archiving software affects several roles within an organization, ranging from IT operations to I&KM pros like chief legal officers and corporate counsel, making it a hot topic and an investment priority. Organizations deploy message archiving software to kill multiple birds with one stone and achieve:

- **Storage cost savings.** Given the huge volume of email and instant message communications, many organizations find it easy to make the business case for message archiving on storage cost savings alone. Message archiving allows organizations to move mail from the mail server to an archive kept on a less-expensive medium like an Advanced Technology Attachment (ATA) disk, compress the data by an average of 50%, and use single-instance storage by eliminating duplicate documents (especially useful when the same attachment is sent around to multiple recipients). Single-instancing technology will take on even more importance as message archiving vendors expand their offerings into a consolidated archive for information from messaging environments, file systems, collaborative workspaces like Microsoft SharePoint, and other information repositories.

Figure 1 Storage Priorities Have Shifted



Base: 206 storage decision-makers at North American and European enterprises

Source: Enterprise And SMB Hardware Survey, North America and Europe, Q3 2007

- **Improved mailbox management with easy access to messages.** When message archiving first emerged, its primary use was to relieve messaging servers of the burden of managing too many messages and attachments. The volume of messages continues to increase, as does the variety of message formats: Today it's not just about managing emails and attachments but also instant messages and voicemails. Messaging administrators want to keep users' mailbox sizes under control to optimize the performance of the message server. Users, however, want to keep as much of their mail and messages as possible because the messages contain information the users may want to refer to at a later date. By using the email client integration and retention management capabilities of message archiving vendors, organizations can give users a central place to store messages they want to keep while also enforcing mailbox size limits.
- **Lower-cost eDiscovery.** Conducting discovery of email typically consists of searching the messaging server for all active messages of given custodians, restoring backup tapes to get messages stored on lower-cost media, and tediously collecting personal archive folders (PST or NSF files) from people's desktops or other network locations. With message archiving, discovery of email can be as simple as executing a search. And with value-add search functionality, message archiving software can reduce the amount of collected information, which drastically cuts the costs of the very expensive task of having outside legal help reviewing information.²

The fact that message archiving provides a wide variety of benefits while not necessarily requiring that organizations have fully baked records management (RM) policies makes it one of the hotter technologies in the information management realm. While the category has existed for more than a decade, the solutions landscape remains relatively immature — only recently have vendors begun to integrate value-add tools, such as eDiscovery modules and advanced search and analytics. Recent market consolidation (e.g., CA's 2005 purchase of iLumin and Autonomy's 2007 purchase of ZANTAZ) is just the tip of the iceberg; the market will continue to change rapidly. Not only will large software companies like Oracle and SAP add message archiving to their product portfolios over the next two years, but message archiving vendors like Hewlett-Packard and Symantec will likely add additional records management capabilities to their archiving platforms. Also, there is likely to be M&A activity between archiving vendors and complementary eDiscovery technology providers; don't be surprised to see a message archiving vendor buying an analytics-driven review platform like Attenex or Clearwell Systems before the end of 2008.

Message Archiving Software Still Comes In A Variety Of Flavors

As message archiving has evolved from a secondary storage consideration to a building block for retention management initiatives, the choice of software provider has become ever important. The playing field has been narrowed somewhat due to consolidation, but organizations still have a menu of message archiving software choices, including:

- **Pure plays.** The number of message archiving point products on the market is dwindling, with Autonomy having picked up the most prominent one, ZANTAZ, in the summer of 2007. High-profile point solution providers still exist in today's market, including Mimosa Systems and ZipLip (though none with enough market presence to qualify for inclusion in this Forrester

Wave™ evaluation). Choosing a pure-play provider makes the most sense when an organization needs price-competitive message archiving and does not yet have a strategic ECM, storage, or search software provider in place.

- **ECM suite providers.** Increasingly, I&KM pros view message archiving as an entrée into broader ECM initiatives. Organizations that are not ready for full-blown records management often turn to message archiving as a first step in addressing their retention management needs. IBM and Open Text offer message archiving products that uses each vendor's ECM repository as the back-end archive repository, while EMC continues to work diligently to integrate its EmailXtender product into the Documentum ECM platform. Using the message archiving product of an ECM suite vendor makes the most sense when an organization has already invested in a specific ECM suite and wishes to leverage as much technology from a single vendor as possible.³
- **Storage management and search vendors.** Other vendors besides ECM suite vendors also offer message archiving as part of a broader product portfolio. CA, EMC, HP, IBM, and Symantec all provide a suite of storage management software and hardware and bundle message archiving within that suite. Vendors like Symantec also provide message archiving in combination with other security products. And Autonomy ZANTAZ now offers message archiving integrated with its core search and analytics offerings. Organizations that have standardized on storage or search infrastructure vendors may find message archiving a value-add component that can be sourced at a volume discount.

MESSAGE ARCHIVING SOFTWARE EVALUATION OVERVIEW

To assess the state of the message archiving software market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top message archiving software vendors across approximately 85 criteria.

Evaluation Criteria: Current Offering, Strategy, And Market Presence

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against approximately 85 criteria, which we grouped into three high-level buckets:

- **Current offering.** We focused on value-add functionality like records and retention management and eDiscovery support in addition to message capture capabilities, security, storage, and proven scalability.
- **Strategy.** Message archiving vendors need to provide an archive not only for messages and attachments, but also for content from collaborative workspaces like SharePoint and IBM Lotus Quickr and unmanaged file systems. Additionally, these vendors need to offer real solutions for eDiscovery that match up well with records management initiatives. We looked at vendors' visions, product road maps, and ability to execute on their plans.

- **Market presence.** We evaluated vendors' current installed bases and the size of their message archiving product revenues. We also looked at each vendor's overall revenue and geographic presence.

Vendors Selected For Proven Ability To Handle Large Deployments

Forrester included eight vendors in the assessment: Autonomy ZANTAZ, CA, EMC, HP, IBM, Open Text, Quest Software, and Symantec. Each of these vendors has (see Figure 2):

- **One hundred or more message archiving software customers.** We looked for solutions validated by customer usage.
- **A total of 1 million or more mailboxes under management.** We looked for proven solutions that have also been put into production in large environments.
- **Deployments where the archive manages at least 40 TB of data.** We looked for solutions capable of actively and successfully holding large amounts of information to ensure gauge scalability for the largest environments.

Figure 2 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Product version evaluated	Version release date
Autonomy ZANTAZ	Enterprise Archive Solutions (EAS)	6.1	October 2007
CA	CA Message Manager	r12	January 2008
EMC	EmailXtender	4.8	December 2006
Hewlett-Packard	Email Archiving software for Microsoft Exchange, Email Archiving software for IBM Lotus Domino	1.5 1.6	July 2006 September 2007
IBM	IBM CommonStore	8.4	November 2007
Open Text	Livelink ECM - Email Management	9.7	October 2007
Quest Software	Archive Manager	3.7	July 2007
Symantec	Symantec Enterprise Vault, Symantec Discovery Accelerator, Symantec Compliance Accelerator	2007	July 2007

Vendor selection criteria

The vendor has 100 or more message archiving software customers.

The vendor has a total of 1 million or more mailboxes under management.

The vendor has deployments where the archive manages at least 40TB of data.

AUTONOMY ZANTAZ AND SYMANTEC LEAD A HIGH-STAKES, COMPETITIVE MARKET

The evaluation uncovered a market in which (see Figure 3):

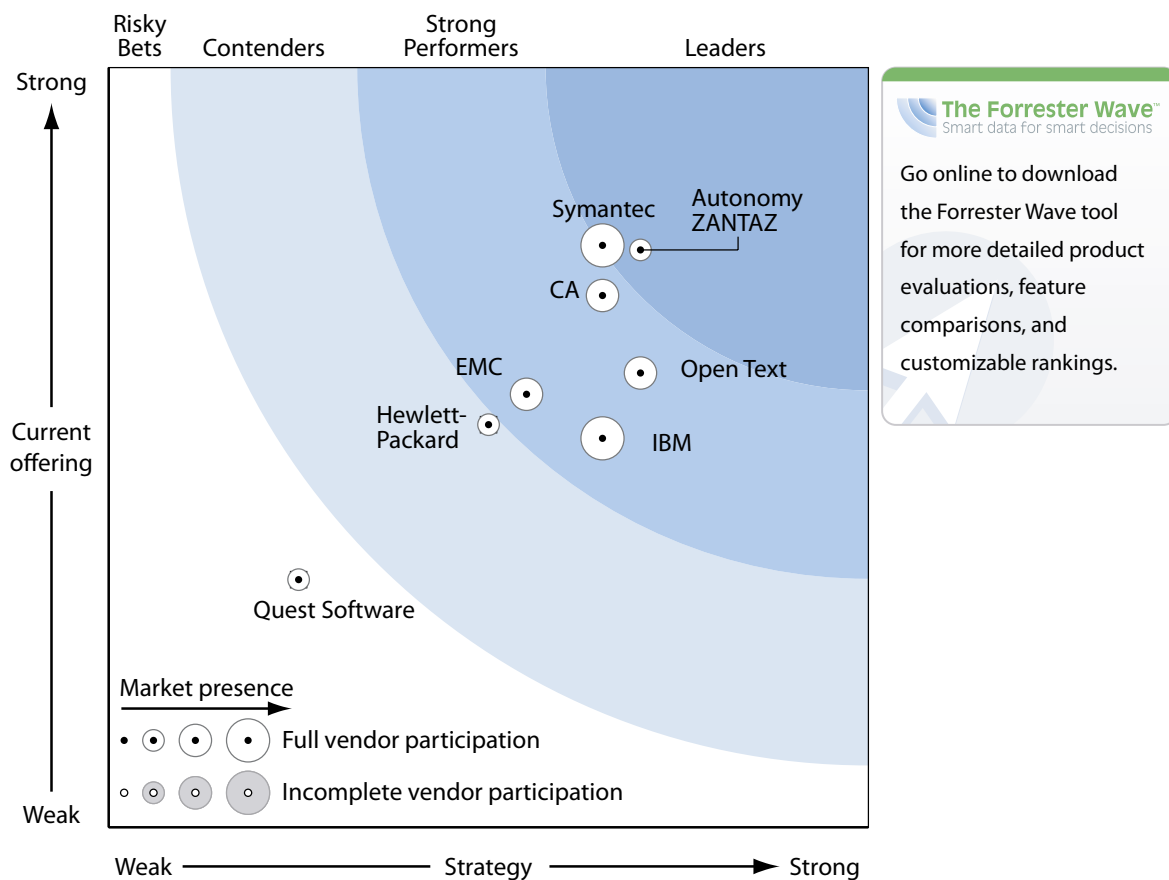
- **Autonomy ZANTAZ and Symantec have the edge in a highly contested market.** Proving the relative immaturity of this market, the leaders don't find themselves head and shoulders above the rest. Autonomy ZANTAZ and Symantec both offer various elements of advanced functionality in areas such as retention management, eDiscovery support (including search and analytics), and support for archiving content from beyond just messaging systems that customers demand. But both have work to do on product and company strategy. While both vendors have visions that address the right business pain points, each is facing significant obstacles to execute on that vision. Autonomy ZANTAZ lacks broader ECM capabilities and must digest several recently acquired companies; Symantec has gaps in broader ECM and records management and does not own its own search technology.⁴ We believe that Symantec will rely on consolidation to expedite its strategy — either being acquired by a larger software vendor like Oracle or buying a smaller ECM or RM vendor; the latter option will be tough in an increasingly competitive environment with fewer and fewer ECM pure-play acquisition targets.
- **Strong Performers CA, Open Text, IBM, and EMC differentiate through portfolio breadth.** These software giants of the message archiving world all focus on providing message archiving as a part of broader IT portfolios. EMC, IBM, and Open Text focus on building value-add features and functions into their message archiving products while offering message archiving as part of their broader ECM portfolios. IBM and Open Text have already integrated message archiving into their ECM platforms, while EMC continues work to integrate EmailXtender into the Documentum platform by summer 2008. IBM has done a good job of building advanced analytics into its archiving product, while Open Text has focused on adding more and more eDiscovery features. However, all these vendors face a tough catch-22 — their message archiving products make the most sense when a customer has standardized on the vendor's ECM platform, while many customers today deploy message archiving before selecting a broader ECM platform. CA does not have the broad ECM portfolios that EMC, IBM, and Open Text do, but the vendor does have strong RM and complementary file system archiving — both of which are packaged with the Message Manager product under CA's new Information Governance umbrella. To effectively compete in this market over the longer term, CA needs broader ECM capabilities than it acquired with MDY in 2006.
- **HP offers a different approach with its appliance offering.** HP's Integrated Archive Platform (IAP) provides message archiving software bundled with storage hardware — HP, first and foremost, wants to maintain IAP's greatest strength of providing a scalable archive. However, to improve how people will use the product, the vendor must augment its integration with email clients. HP also finds itself between the proverbial Scylla and Charybdis: It must choose between delivering an integrated appliance that differentiates itself with scalability and

providing the flexibility enterprises want in choosing high-end message archiving software they can place on the (typically lower-cost, lower-end) hardware of their choosing.

- **Quest Software lags significantly, making it a Risky Bet as a long-term strategic investment.** For years, Quest Software specialized in helping customers migrate from Lotus Notes to Microsoft Exchange or from one version of Microsoft Exchange to the next. The message archiving product still should be viewed as a solid choice for Microsoft Exchange customers that don't need many bells and whistles, but Quest has a long way to go to build out the value-add features and functions that today's enterprise customers demand, such as analytics and eDiscovery support.

This evaluation of the message archiving software market is intended to be a starting point only. Readers are encouraged to view detailed product evaluations and adapt the criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

Figure 3 Forrester Wave™: Message Archiving Software, Q1 '08



The Forrester Wave™
 Smart data for smart decisions

Go online to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.

Figure 3 Forrester Wave™: Message Archiving Software, Q1 '08 (Cont.)

	Forrester's Weighting	Autonomy ZANTAZ	CA	EMC	Hewlett-Packard	IBM	Open Text	Quest Software	Symantec
CURRENT OFFERING	50%	3.80	3.50	2.85	2.65	2.56	2.99	1.63	3.83
Message capture	5%	3.68	4.53	2.43	3.18	3.52	3.13	1.70	3.72
Range of content types supported	20%	4.70	3.10	2.90	2.10	2.80	3.85	1.55	4.40
Message management	35%	4.42	3.51	2.73	3.11	3.72	3.36	2.64	3.99
Supervision	5%	3.50	4.25	2.80	0.00	0.15	1.93	0.00	3.40
Scalability	25%	2.95	3.80	3.25	3.05	0.85	2.10	0.70	3.25
Security	5%	3.25	3.25	3.75	1.75	2.88	1.75	1.75	5.00
Other	5%	1.00	1.90	1.00	2.70	3.20	3.60	1.00	2.60
Cost	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
STRATEGY	50%	3.50	3.25	2.75	2.50	3.25	3.50	1.25	3.25
Vision and product strategy	100%	3.50	3.25	2.75	2.50	3.25	3.50	1.25	3.25
Average deal size	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MARKET PRESENCE	0%	2.96	3.29	3.84	2.98	4.19	3.07	2.74	4.17
Installed base	55%	3.15	3.30	4.25	2.20	3.90	3.45	2.70	4.25
Revenue and profitability	30%	2.60	3.00	3.00	4.20	5.00	3.20	3.20	3.80
Total employees	5%	3.00	5.00	5.00	5.00	5.00	3.00	3.00	5.00
Services	10%	3.00	3.20	3.50	2.60	2.90	0.60	1.40	4.40

All scores are based on a scale of 0 (weak) to 5 (strong).

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Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders Offer Advanced Features, Functions, And Flexibility

- Autonomy ZANTAZ.** Autonomy bought up-and-coming ZANTAZ in the summer of 2007. ZANTAZ differentiated itself in the message archiving software market by focusing on eDiscovery and integrating its Introspect review application with its EAS archiving product. Autonomy, already a leading provider of search and analytics, saw the potential synergies in its portfolio and recognized the heat in the eDiscovery marketplace. Now Autonomy offers an EAS product with strong search, analytics, a broad range of content types supported (native, integrated offerings for file system archiving and SharePoint archiving), and advanced eDiscovery capabilities — the value-add features customers are demanding. Autonomy does lack broader ECM capabilities such as an active repository, and it still needs to demonstrate proven scalability in Lotus Notes environments to move further up in the Leader category.
- Symantec.** Symantec has been a Leader in this market for quite some time and now faces stiffer competition than ever before. The Enterprise Vault product offers added-value functionality — Discovery Accelerator for eDiscovery; Compliance Accelerator for supervision; the greatest

number of connectors to leading RM systems; strong storage management; and strong security mechanisms. But, Symantec, too, has product gaps, notably a lack of broader ECM capabilities and a reliance on the end-of-lifed AltaVista search engine (a major issue, given the importance of search to eDiscovery). Symantec recently introduced support for Lotus Notes environments and will need time to build up experience in large-scale Notes environments.

Strong Performers Integrate Message Archiving Into Broader ECM And Storage Platforms

- **CA.** CA sits in an interesting position in the message archiving market. It offers a competitive product in Message Manager with strong PST migration testimonials, good cross-platform support for both Exchange and Lotus Notes environments, a market-leading RM system integrated to the message archive, and good native supervision functionality. The vendor lacks a broader ECM story, needs far better multilanguage support, and does not have any native (or even partner-provided) content analytics capabilities. Despite having a competitive product, anecdotal evidence points to Message Manager making fewer and fewer customer shortlists due to CA's history of bleeding maintenance revenues out of acquired products but not doing much to advance the products itself. CA has taken steps, with its Information Governance group (a group that encompasses RM, message archiving, and file archiving), to change its perception in the market.
- **Open Text.** Open Text continues to perform well in Forrester's Wave evaluation of the ECM suites market. The vendor integrated its message archiving software with its Livelink ECM platform, using the Livelink repository for archived messages. This allows direct use of RM features on archived emails. Livelink email archiving also provides good cross-platform support for Exchange and Lotus Notes environments and well-integrated and native file system and SharePoint archiving modules. The product offers only basic supervision and security mechanisms. It is an appropriate choice for those that have already chosen Livelink as their ECM platform, but unfortunately, not for companies that already have other ECM infrastructures deployed.
- **IBM.** IBM offers a broad array of products complementary to its CommonStore message archiving technology. CommonStore integrates with IBM DB2 Content Manager, allowing DB2 Content Manager's RM functionality to be used directly on archived messages. The company has also done a good job of integrating elements of search and analytics from IBM's Omnifind (search and analytics software) group into the archiving environment. However, IBM relies completely on Orchestra for supervision, which is a risky move, as Forrester believes Orchestra will likely be acquired — possibly by IBM, but more likely by one of its competitors — before the end of 2009. IBM also still has the task of rationalizing the CommonStore product with the FileNet Email Manager product, a project that won't be complete until Q3 2008. CommonStore is a good choice for large enterprises that have standardized on Lotus Notes environments and have already committed to IBM's content management stack.

- **EMC.** EMC, one of the world's largest software vendors, offers message archiving software within a portfolio of highly complementary products. EmailXtender features strong storage management support, which is to be expected of a storage company like EMC. The product does lack added-value features like content analytics and is not yet fully integrated into the Documentum platform to take advantage of EMC's native RM capabilities. Still, EmailXtender is a wise choice for enterprises that need to archive Exchange and/or Lotus Notes environments and have a strategic relationship with ECM for storage and/or ECM.

Contenders Focus On Scalability, Need More User-Friendly Features

- **HP.** HP recently changed the name of its RISS product to Integrated Archive Platform (IAP). And it's just that: an integrated set of archiving software and storage hardware designed to be highly scalable — a clear strength of the product. IAP also provides cross-platform support for both Lotus Notes and Exchange environments. HP does need to enhance integration with email clients to improve how people can access and use archived information. HP also needs to expand its archiving support to include more than messages and attachments — e.g., file systems and SharePoint. The product also lacks supervision, making it inappropriate for highly regulated firms. HP will also benefit by adding ECM capabilities as it builds out its newly formed information management group. The IAP is a good choice for organizations that need to archive large amounts of messages and have the capability to build their own client-side integrations to appease end users.

Risky Bets Provide A Solid Archive But Are Missing Advanced Features

- **Quest Software.** Quest Software has traditionally focused on helping customers with messaging system migrations to Exchange (either from earlier versions of Exchange or from other messaging systems), archiving the data before executing the migration. As a result, its message archiving offers good storage management and provides strong support for Exchange environments. The vendor now must focus its energy to build out value-add functionality like retention management, eDiscovery support, and supervision. Unfortunately, Quest Software sits well behind its competitors, making it a logical choice only for those in need of a simple message archive for Exchange.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 3 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with three of each vendor's current customers. In addition, Forrester asked for separate references to testify to successfully managing large indexes and for satisfaction with importing large amounts of PST and/or NSF files into the archive.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and readers are encouraged to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve.

ENDNOTES

- ¹ Message archiving software is by far the most deployed technology for retention management initiatives. See the July 17, 2007, "[Abysmal: The State Of Retention Management](#)" report.
- ² The review phase of eDiscovery carries not only the direct cost of a review application, but also a very high indirect cost: lawyers who actually conduct the review. See the December 27, 2006, "[Ask Potential eDiscovery Providers All The Right Questions](#)" report.

- ³ Enterprise content management exists as a major technology category because of the pervasive need to manage unstructured information — documents, scanned images, rich media, Web content, corporate records, emails, and other content. See the November 9, 2007, “[The Forrester Wave™: Enterprise Content Management Suites, Q4 2007](#)” report.
- ⁴ Autonomy’s purchase of ZANTAZ gives it both the EAS message archiving software product and the Digital Safe message archiving hosted services offering. Digital Safe is a leader in Forrester’s most recent evaluation of message archiving hosted services providers. See the February 7, 2008 “[The Forrester Wave™: Message Archiving Hosted Services, Q1 2008](#)” report.

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Headquarters

Forrester Research, Inc.
400 Technology Square
Cambridge, MA 02139 USA
Tel: +1 617.613.6000
Fax: +1 617.613.5000
Email: forrester@forrester.com
Nasdaq symbol: FORR
www.forrester.com

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