Market Analysis

E-Mail Active Archiving Targets Storage, Regulatory and Content Management

Abstract: A new market has emerged as companies ensure they manage e-mail for regulatory compliance, save e-mail as part of a content management strategy, or look to better manage the growth of e-mail data stores.

By Carolyn DiCenzo and Maurene Grey

Strategic Market Statement

The growing need to better manage all types of content will provide a competitive advantage to regulatory-focused and storage management-focused vendors that link to broader content management solutions.

Strategic Forecast Statement

The e-mail active archiving market is expected to grow to $134 million by 2006 for a five-year CAGR of 58 percent (probability 0.7).
Active Archiving Products Coming From Multiple Directions

A new market has surfaced for archiving products that provide a more active archive capability, providing faster and more transparent user access to archived information. Historically, archiving has been to tape or optical devices with the idea that the information will be written once and accessed infrequently, if at all. The archive can be to capture the state of company data at a point in time or for storage of historical documents. Access to this information typically is only by system administrators. With the growth in database size, with the growth in e-mail stores, and with the interest in mining the range of corporate content, a new market has risen for archiving information in a more accessible form. Faster tape technology and ATA (advanced technology attachment)-based disk arrays and appliances are providing storage options that sit between expensive RAID arrays and cheaper, slower tape and optical devices. The active archiving of e-mail has seen high growth as a plethora of vendors have surfaced to address the multiple problems and opportunities around e-mail with new or extended software products and services.

The growing size of e-mail data stores is becoming a storage management issue for many companies as the time to backup and, more importantly, restore is exceeding operational limits. At the same time, companies are beginning to realize that e-mail messages and attachments represent business records that must be retained and managed securely to support regulatory compliance, avoid legal fines or litigation costs, and satisfy auditing requirements. In addition, e-mail represents an increasingly large part of the corporate “knowledge asset”. Organizations want and need to leverage this asset through content management tools. And, while there are vendors that address the storage problem, the regulatory problem or the content management problem, there are now a growing set of vendors offering tools to address a combination of requirements, providing access to the archived messages to users, not just IT administrators. Gartner Dataquest looks at the market for e-mail active archiving and the vendors that are gaining traction in that market.

Regulatory Review and Archiving Focus Increases

The rules governing the retention of documents, including e-mails, are not new but recent high-profile litigation against Microsoft, Enron and others has raised awareness of corporate exposure to expensive discovery costs and fines for noncompliance. Government regulated industries worldwide are at particular risk but all corporations have a need for policing corporate communications for appropriate content and for selected record retention. Products that specifically address the regulatory aspects of e-mail management will need to have the capability to review (and sometimes hold) messages coming in and going out of the company for key words that might indicate a compliance violation. Communication within the e-mail system may also need to be monitored. There is also often a requirement to archive all e-mail on a tamperproof media, such as WORM (write once, read many) optical or tape media for an extended period of time.
E-Mail Storage — A Growing Problem
Because of the limitations in the size of an e-mail data store for operational reasons (such as time to back up and amount of storage space), most companies limit the size of user mailboxes. To free up space, users have to delete some messages or move them somewhere else, often to a personal message storage folder on the desktop computer, or to a network file server. While some e-mail systems support auto archiving old messages to personal message folders, every folder and subfolder must be set up individually, and these messages are not usually backed up, often taking up a large amount of disk space. In addition, these growing personal libraries of e-mail messages are of growing interest to senior management concerned about the company’s exposure to costly legal discovery processes.

E-Mails as Part of Expanded Content Management
E-mail messages account for a large portion of business-critical records being created, captured and stored in the corporate environment. E-mail systems were never designed to support records management but content management systems are increasingly looking for ways to include fax, recordings of live voice conversations, voice-mail, instant messages, digitized paper documents, e-mail messages and attachments in their database. The ability to identify valuable e-mails requires content aware classification technologies that are only now starting to appear for use with e-mail systems. Creating an e-mail archive is often the first step to including e-mail as part of a more integrated content management system.

Basic Approaches to E-Mail Active Archiving
Although there are three basic approaches to e-mail active archiving defined below, there are many variations and options, often from the same vendor. Even the e-mail products themselves offer an approach to archiving that may get stronger as user requirements become more clear. And, while all backup products provide the ability to archive the e-mail data store for point-in-time historical retention, the intent here is to focus on vendors that have products focused primarily on e-mail active archiving, providing user access to an extended set of e-mail messages.

Model 1: Archiving for Regulatory Compliance
Companies with a requirement to insure that all communications meet legislated or company-mandated restrictions require a process where all messages entering or leaving the messaging system, and even often communication between employees (or a defined set of employees), can be reviewed to insure compliance. Those messages also must be saved in a taper-free way for a period of time in case they need to be retrieved to prove compliance or to support legal review. Vendors with products that intercept messages at the e-mail boundary (at the Simple Mail Transfer Protocol (SMTP) relay level) will be able to perform a pre-transmission review of messages entering and leaving the corporation. To capture messages between employees on the same e-mail system, the product
must link into the e-mail system via application programming interfaces (APIs) provided by the messaging vendor. Since these messages are already in the e-mail data store, a post-transmission review is all that is possible. All messages are most often archived to WORM media, such as optical disk or WORM tape. The active archive software needs to have query and sampling capabilities so that personnel assigned to police compliance can review selected messages. Archived messages are retained for the mandated period of time and then must be deleted. Only a select set of employees are allowed access to the archive although, in some cases, storage administrators are given access to support e-mail retrieval for a user. An example of a product that is purely focused on regulatory review and archiving is SRA’s Assentor Content Scanning and Archiving solution.

- The only impact on e-mail users would come in delay of message receipt or transmission if review were required.
- It does not reduce the size of the active mail data store and it does not address e-mail storage management issues.
- It meets regulatory requirements for a complete e-mail record.
- Although it could be used for fast recovery of deleted messages, in many cases, the access to the archive is restricted.

**Model 2: Archive E-Mail Attachments**
E-mail attachments are often the biggest component of the message store. Moving those attachments into an archive and removing them from the main e-mail database will substantially reduce the size of the data store and will result in a reduction in backup and restore time. Some vendors archive the message and the attachment to accomplish attachment archiving. All attachments can be archived or they can be archived based on date, size or file extension. An example of a product whose only purpose is to archive attachments is Veritas’ NetBackup Storage Migrator for Exchange.

- There is no impact on e-mail users other than potentially a slightly longer delay in bringing up archived attachments.
- It reduces the size of the active mail data store.
- It does not meet regulatory requirements for a complete e-mail record.
- It does not provide for fast recovery of deleted messages.
- Users cannot retrieve attachments if working offline (disconnected from the network that would connect them to the archive).

**Model 3: Selective Archiving**
Vendors supplying products that allow for archiving a selected set of messages from the messaging system provide tools that offer a company a range of approaches that fall anywhere from complete regulatory retention compliance to merely storage management. Since it is widely estimated that only 30 percent of e-mails are worth retaining, if some intelligence can be implemented in the archive process, fewer casual messages will be moved to the archive. One approach might be to move all e-mails older
than a certain period to the archive or only those with certain key words or of a certain size. Companies are given the flexibility to define their own records' retention policy and to implement that policy in the active archiving system. In some cases, archived messages still appear, for a period of time, in the user's mailbox as if they still reside on the active store. A user need only click on the message and it is automatically retrieved back to the active store. Most products allow systems administrators and even end users to access the archive via a browser-interface or an e-mail client, such as Outlook, to retrieve messages. Since users can delete casual messages before they get archived, there is a potential for reduced archive storage requirements. But, that user flexibility could also result in the deletion of important messages before they are archived, necessitating a recovery from backup tapes.

- This reduces the size of the active mail data store. Users will need to be connected to the network to retrieve archived messages. Users may be able to help reduce the size of the archive by deleting messages that are not worth retaining.

- Using a set of defined policies based on selection criteria, selected messages are moved to the archive. Care in defining the selection criteria is required if the goal is to meet regulatory requirements.

- This provides for fast recovery of most deleted messages though there exists a possibility of a message being deleted prior to archiving, depending on selection criteria.

**E-Mail Archiving Vendors**

While content management vendors are becoming increasingly interested in better managing and including e-mail content in their data stores, there is a growing number of vendors that are focused on e-mail management from a regulatory or storage management perspective. Most of the products are fairly new to the market, with SRA’s Assentor the oldest with a product release in 1997. Some are focused exclusively on the regulatory compliance space while most now try to add tools for decreasing the size of the e-mail data store.

**Regulatory Compliance-Focused Vendors**

SRA, Tumbleweed and @rchive-it.com focus exclusively on archiving e-mail messages for regulatory review and retention purposes. Although most of the other products in this report can also provide similar tools, these vendors have focused heavily on their scanning and selection tools.

**SRA International Assentor Archiving and Content Scanning**

SRA’s Assentor products provide for archiving and content scanning for regulatory review. Assentor captures e-mails at the e-mail network boundary (SMTP relay level), scanning and archiving all messages, ensuring that e-mail communications (or those for employees being monitored) follow corporate and regulatory requirements. Through a link into the Microsoft Exchange and Lotus Domino message system, the
product is able to do a post-transmission review of internal communication and add a copy to the archive. The product allows for message searching and retrieval from the archive based on header, message body and attachment content, and provides for archive purging as company policy dictates. The product does not contain any tools for managing the e-mail data store. Assentor is a 22-person, self-contained product-focused business unit within SRA. The group is responsible for its own development, sales and support, and primarily targets North American companies.

**Tumbleweed Secure Archive**

Tumbleweed is a company in transition as it works to integrate the products from its January 2000 acquisition of Worldtalk Communications, the original developer of its Secure Archive product. The company’s focus is on securing e-mail and Internet communications to meet government regulatory and company policies. The company’s content filtering products are intended to ensure that nothing enters or leaves the company that does not meet company policy. The overall product suite is known as Secure Guardian. The Exchange archiving product sits at the e-mail network boundary (SMTP relay level) and archives all messages with predefined words or phrases to an optical jukebox. It does not, in any way, touch the e-mail server nor can users access the created archive. It thus will not solve the e-mail data store problem nor does it provide a permanent archive of all e-mail correspondence sent externally. It does not filter or archive messages sent within the e-mail system internally. The product is meant to serve as a regulatory supervision tool.

**@rchive-it.com MailStore**

UK-based @rchive-it.com entered the e-mail archiving market with the release of its MailStore product in June 2002. The company is now moving its two beta customers into production and looking to leverage its reselling partners, Peapod and Bridgehead Software. The product supports Microsoft Exchange, and is focused on providing a secure archive to meet records retention requirement and provide an audit trail of record access for applications with privacy requirements. All records entering or leaving an Exchange system are copied to the archive, digitally signed and encrypted. Records that meet defined policy based on the information in the message are retained. All others are deleted. Users are allowed to access a set of records based on their defined privileges using a browser-based application. All activity with a given record is logged for audit purposes. MailStore copies records from the Exchange data store but does not, in any other way, modify the store.

**Attachment Archiving Vendors**

While archiving attachments reduces the size of the e-mail data store with minimal impact on users, a product that only archives attachments does not have the added potential for addressing regulatory requirements or as a feed into a content management system. Products that offer a range of selection criteria for archiving messages can often be set to archive messages with attachments. Some customers find that starting with a
limited implementation that only involves messages with attachments is a good way to begin archiving.

**Veritas NetBackup Storage Migrator for Exchange**

The Veritas NetBackup Storage Migrator for Exchange first became generally available in May 2000. It is targeted entirely at the e-mail storage problem by providing a simple offload of attachments to secondary storage to reduce the size of the e-mail store.

**Selective Archiving Vendors**

The vendors included in this section focus on managing the life cycle of e-mail messages, often taking advantage of hierarchical storage manager (HSM) technology to remove infrequently accessed messages to an active archive and then to a permanent archive. Depending on the customer implementation of a set of options, the solution can range from a complete regulatory compliance solution to a data store offload.

**kVault Software Enterprise Vault**

kVault Software (KVS) was founded in 1999 by the engineers that created the Compaq Enterprise Vault product in early 1999. Compaq was selling off software assets and the new company bought the Enterprise Vault technology and has continued to enhance and market it under the KVS name. Compaq (now merged with Hewlett-Packard) has remained a key partner and reseller. The 80-person company has put together a worldwide partner network to complement their 25-person sales force. HP is a global partner. European partners include Computacenter, SCC, ICL, Fujitsu Services and Comparex. NuTech, GE Captial, Globanet, ConQwest, HighSoft, WinResources, Dallas Digital and MainStreet sell the product in North America.

The core product automatically handles the archiving of Exchange 5.5 or 2000 e-mail from mailboxes and public folders based on selected criteria, such as age of the document or size of the mailbox relative to the storage quota. The shortcuts that are left behind when messages are moved to the archive can also be given a lifespan so that they are automatically deleted after a certain time. User initiated archiving is available from an Outlook add-on option. Information in the archive vault is deleted based on defined retention policies.

User mailboxes and public folders are archived by services that access Exchange via its Microsoft API (MAPI) and then store and index them in the archive vault. The searching and retrieving capability not only provides users access directly to the archive, if authorized, but provides tools for people, such as auditors and legal compliance personnel, to perform information search and recovery operations. Add-on options provide for the archiving of Exchange journal mailboxes and PST files.
**Legato Systems (OTG Software) EmailXtender**

California-based Legato Systems (through its May 2002 acquisition of OTG Software) launched EmailXtender in mid-2000 after acquiring xVault, the original developer of the technology. EmailXtender provides message archiving for Microsoft Exchange 5.5 and 2000, IBM Lotus Notes and certain versions of the Unix Sendmail Protocol. The administrator can define selective archiving policies based on criteria, such as message age, or can choose to capture and index all messages and attachments in real time via journaling (Microsoft Exchange) or Legato’s “listener” technology (Lotus and Sendmail). In either case, archived messages can be deleted, based on defined retention policies. Authorized end users can access archived messages via the product’s search and retrieval capabilities, which also enable supervisors or administrators to perform cross-mailbox search and retrieval operation for legal or compliance purposes.

In December 2001, the company introduced two new products. EmailArchive is a "light" version of EmailXtender that provides for basic message archiving and data store management. EmailXaminer, includes everything in the EmailXtender package as well as an expanded compliance component. With EmailXaminer, all outgoing or incoming messages for the members of a defined review group are sampled using representative sampling techniques that apply rules, including the use of a lexicon of industry terms and phrases.

Legato has an extensive partner program worldwide selling the e-mail archiving product family. In addition, the company has a set of original equipment manufacturer (OEM) vendors creating appliance-like solutions. For example, Quantum offers the Snap Server EmailXtender Archive with its storage area network (SAN) server appliances and StorageTek is offering the ASM/Email Xcelerator software suite with its storage hardware and services. Zantaz is offering EmailXaminer with its Digital Safe service and several of Legato’s document management value-added resellers (VARs), such as Mackin Imaging, are now also adding EmailXtender to their portfolios.

**Educom TS Exchange Archive Solution**

Canada-based Educom TS was founded in 1994 as a consulting company. It moved to become a product company in 2000 with the March release of Exchange Archive Solution (EAS). Leveraging code developed in a consulting assignment, the 30-person company is now offering its solution primarily through a network of distributors and VARs. The company is being selective in its approach to the market and restrictive in the information it will share with any but qualified prospects.

The product archives messages and stubs as a scheduled service based on formula rules built with a scripting language to define policies for archiving, retention and disposition. The formula language can also be used to purge specific messages from the Exchange mail store, which is useful in extracting virus-infected messages already in the message store. When mail is archived from multiple Exchange servers, duplicate messages are automatically consolidated and stored as a single instance.
Messages are grouped into a structure called a day archive for improved space utilization. The EAS snap-in to Active Directory adds a tab in the Active Directory console, allowing users to be enabled for archiving when they are added to Active Directory. The EAS snap-in to the Microsoft Management Console (MMC) can be used to schedule archive runs and for confirming that archive runs have been successfully backed up. Also included are modules for PST migration, archiving of public folders, purging of records from the archive and migration to long-term storage (in version 3.0 due out in fall 2002), and a tool for importing e-mail to an enterprise document or records management system. Full text searching in EAS is accomplished through the use of Microsoft Site Server, SharePoint, or EAS-Search. EAS-Search is an add-on product to EAS that is powered by the AltaVista search technology. Through the use of any of these search technologies, full text searching of messages and their associated attachments can be done directly through Outlook, Outlook Web Access, or the EAS Web Client. Another add-on product, EAS Wireless server, allows wireless users to stay connected to their e-mail with the option to receive highlights or e-mail abbreviations of their incoming e-mail. And through a partnership with eManage, Educom TS offers EAS-RM to include e-mail as part of a DoD 5015.2 certified records management system.

The company’s goal is to drive business exclusively through the channel. It has a 12-person sales force to support the channel and to directly handle uncovered areas. SOARsoft is the distributor for Australia, New Zealand and Africa. Essential Computing covers Europe, including the U.K. and Russian Federation. Warrior Sys supports sales into Israel. And FreTech covers South East Asia. Kenfil Hong Kong covers Hong Kong, Taiwan and Mainland China. Educom currently covers North America and Latin America with its direct sales force and about 30 VARs located in major cities. Professional services is a key component to the sale to help set up the total hardware/software solution but the actual installation of the product requires minimal services.

**IXOS-eCONserver for Exchange/Notes**

The German-based IXOS Software is a document management company with a special focus on SAP archiving. The company extended into the e-mail management space first via consulting projects in 1997 and then launched products in 2000 with the release of its IXOS-eCONserver suite for MS Exchange 5.5/2000 and in 2001 for Lotus Notes 4.5, 4.6 and 5.x. The company is leveraging its extensive experience gained in the SAP space with its IXOS Archive, which automates the imaging and other document needs associated with business documents in the R/3 environment.

The Microsoft Exchange product supports user-initiated and automated archiving based on parameters, such as age, size or deleted items. The focus of the product is on managing the messaging data store and providing a way to access deleted and old e-mail messages. Users can access archived messages from their Outlook or Notes client, or a special Web interface can be used against the archive. In Microsoft Exchange, PST files are automatically deleted and moved to the archive, leaving stubs so
that users can retrieve the messages as if they were still physically located in the user mailbox. The product can be used to support Exchange 5.5 to 2000 migrations. The company’s references were all using optical media for archiving but the company claims support for all types of archive devices.

Iwitness VeriMail and Archive Center

Founded in 1997, Iwitness is in early release with an e-mail archiving product that focuses on analysis, review and retention of e-mail for legal record retention and compliance requirements, but also appears to be designed to have strong storage management tools. The product, Iwitness VeriMail and Archive Center, supports Exchange archiving. It archives to an Oracle-based server on a Windows, Solaris or Linux platform and supports either Sun’s SAM-FS file system or Veritas’ Storage Migrator for movement to the archive. The product implements advanced features of Oracle Text for content analysis and auto-categorization of e-mail. The company expects to have reference customers in the last half of 2002 and will work to develop their selling channel.

Selective Archiving Vendors with a Content Management Focus

Document management vendors are increasing the scope of their management vision to include an expanded set of content types. E-mail is seen as a critical addition to that expanded content store. IBM, TrueArc, Topcall and eManage are examples of vendors that have a focus on content management and have recently released e-mail archiving products as a way to begin bringing messages to the overall content store. Although they will sell the products to companies simply looking to manage e-mail, the products are designed to best fit in a complete content management solution.

IBM CommonStore for Exchange/Notes

IBM offers its CommonStore archiving products as part of its Content Manager product family. The first product in the e-mail set was CommonStore for Lotus Domino, which began as a services offering, becoming a product in March 2000. IBM claims that CommonStore for Lotus Domino is in at least 100 customer sites. The Exchange product is newer and, since it only supports Exchange 2000, has a much smaller customer base.

CommonStore can be viewed as a separate offering for archiving e-mail messages but should be viewed as a first step to a broader content management system. Archiving of e-mail messages can be user initiated but is more commonly handled on a scheduled basis with mail being archived based on a defined policy which includes focusing on criteria, such as largest mailboxes, date created/accessed/received, and file extension. Stubs are left in the Domino mailbox when messages or documents are archived. If the stubs have been deleted, a query form can be used to access archived information. A single archive server can support multiple Domino servers. CommonStore provides the linkage
between the e-mail system and the backend storage application/archive, which is Content Manager or Content Manager OnDemand. The one reference IBM was able to supply was archiving to a Content Manager database on a mainframe system and the link to the Content Manager is expected to be a key component of most IBM sales of the CommonStore products. Since product development for this product family is out of Europe, the current customer base is heavily weighted toward Europe but IBM is marketing the product worldwide.

**TrueArc for Microsoft Exchange**

TrueArc’s archive product for Microsoft Exchange, announced May 2001, has some basic storage management features but its primary focus is on creating an e-mail archive to meet record recovery requirements. It has a self-learning policy engine based on patent pending ArcIQ technology that evaluates the messages that are manually archived, learns what needs to be archived and then automatically proceeds without further manual intervention. Founded in 1989 as Provenance Systems, TrueArc’s flagship product, ForeMost Enterprise, targets the management of electronic records and has received DoD 5015.2 and U.K. Public Records Office certification. TrueArc and Legato are partnering to add DoD 5015.2 records management to Legato’s ApplicationXtender product. TrueArc is also reselling Legato’s DiskXtender HSM solution for moving the content to longer-term storage. TrueArc is a 50-person company whose primary focus is on their ForeMost Enterprise content and records management product.

**Topcall MetaMail**

Austria-based Topcall updated its e-mail archiving product in April 2002 with the announcement of its TC/MetaMail product. Topcall is a unified messaging company that provides a core appliance called the Communication Server ONE, which works as a modular, unified system for communications. The company added a message archiving module in 1997, which captured messages coming into or out of the company and stored those messages in the Communication Server ONE data store. This is a solution that integrates fax, telex, voice, e-mail and text messaging (such as SMS [short message service]) with a variety of industry-standard mail systems and business applications, backed up with a single, integrated archive. Internal messages can be captured on the mail client (using a hidden bcc: recipient to the Topcall system). The message store itself is not changed. With the addition of TC/MetaMail in April, the company now saves incoming messages in the archive but sends on to the e-mail server only a uniform resource locator (URL), not the full message. This will reduce the size of the e-mail data store in addition to providing an archive. This application now touches on all of the active archiving requirements but is still focused on providing a unified archive of all externally focused messages of all types. The company has a unique market opportunity with the Novell customer base since it is the only solution identified that can reduce the size of a Novell GroupWise data store.
eManage

eManage is a Canadian-based e-mail and records management company (a spin-off from ByteQuest Technologies) with a records management application initially released by ByteQuest under the name ByteQuery for Backoffice in 1997. When the e-mail management functionality was added in 2000, the product was renamed eManage and it provided e-mail records management and e-mail archiving. It received Department of Defense (DOD) 5015.2 standard records management certification in 2000. E-mail archiving is achieved by migrating the e-mails to a separate Exchange server with a set of public folders that contain the messages that have been sorted into the folders based on an automated classification system. In 2002, the company added intelligent content analysis of e-mails and attachments for the purpose of autoclassification and identification of content that violates corporate policies or industry regulations. The company is partnering with IXOS Software and Educom TS to archive the eManage archive to secondary storage. eManage is bundled with every ByteQuest installation and is also distributed on its own as a records management or e-mail management solution, depending on customer requirements.

Worldwide Market Share

The total installed base of companies using regulatory or storage focused message archiving products by the end of 2001 is estimated to be just over 600, as shown in Figure 1. Installations range from less than 100 mailboxes monitored to 10,000 and more. Products being used for regulatory review and compliance often only focus on employees that deal with customers who are directly involved in regulated activities. When storage management is a concern, all mailboxes are usually involved. Revenue from e-mail archive product licenses was estimated to be $13.5 million in 2001. The market is expected to grow to $134 million by 2006 for a 5-year compound annual growth rate (CAGR) of 58 percent. Although the market opportunity is much larger, the size of current vendors and the maturity of the products will impact the market growth over the forecasting period.
Figure 1
E-Mail Active Archiving Market Share Based on Total Installed Base as of the End of 2001

![Pie chart showing market share by vendor.]

- KVS (16%)
- Legato (16%)
- Educom (16%)
- IBM (16%)
- IXOS (14%)
- SRA Assentor (14%)
- Tumbleweed (4%)
- Vertias (1%)
- Others (3%)

2001 Total = 616 Installed Companies

Note: Content-focused archive products that do not touch the e-mail data store are not included (for example, Topcall’s archive option). Regulatory focused products are included.
Source: Gartner Dataquest (August 2002)

Analysis

The market for e-mail active archiving products is very strong from a regulatory and storage management perspective, and companies will increasingly implement solutions that solve those problems. Over time, the need to better manage all types of content will provide an advantage for vendors that link to broader content management solutions. Storage management vendors must include e-mail active archiving solutions as part of their total product set through partnerships or internal product development. Content management vendors must not only include e-mail in the total data store but also recognize the need to remove duplicate data from the mail store whenever possible. Regulatory focused vendors must reach out in both directions since the archive for regulatory purposes should be included as part of total content. Storage vendors should see this a growing opportunity for a set of storage devices that provide different price and performance characteristics for archiving content with various access requirements. And service providers should also see opportunity in this growing market, especially if they work with some of the evolving products to ensure that the special requirements of the services space are accommodated.
Gartner Dataquest Perspective

No vendor provides a solution today that excels in all three areas: regulatory, content and storage management. Customers should select the product that best addresses the primary problem they are looking to solve. Vendors must be clear about their areas of strength to ensure that customers are satisfied with the solution purchased. Over time, vendors must understand that customer requirements will change and work needs to be done to ensure that the current products evolve to offer a strong solution that addresses all three areas of concern longer term.

Customers Must Define Company Requirements

- Decide whether regulatory compliance, content or storage management is your primary driver for the purchase since no current vendor does them all well.

- Define your archiving requirements and involve all the groups that have an interest in the project such as legal, human resources and your financial staff. The IT organization should be involved as the implementers of the technology, whereas the appropriate business units define the business requirements.

- Bring in a short list of vendors and be open to alternative ways to accomplishing your goals.

- If archive performance is a concern, be sure to purchase devices as well as a software product that can meet those requirements. Often, the archive device is the bottleneck.

- Work with your users early in the purchase and implementation cycle so that they understand the changes and the impact on their work.

Vendors Must Manage Growth

- Strong customer references will be important and will depend on not only good software but also good documentation and customer support. Don't grow beyond the geographic capabilities of your support organization.

- Partner with software vendors that can help complete your solution, storage vendors to ensure support for common and new devices, and service providers that will use the product as part of a service offering.

- Train channel partners to deliver the sales and support that properly represents your company and the product.

- New vendors entering the market must look beyond Microsoft Exchange and Lotus Domino to provide offerings for other leading messaging systems, such as OpenWave, Critical Path's CP Messaging Server, Sun ONE Messaging Server and Sendmail Advanced Messaging Server.
Related Research and Recommended Reading

- "Recasting the E-Mail Policy" (COM-11-4113). Enterprises’ e-mail policies must be recast to adapt to the unified and ubiquitous nature of e-mail usage.

- "How to Set Up an E-Mail Retention Policy" (COM-15-7734). Retaining business documents, including e-mail, can be valuable and risky. Enterprises need to consider legal, industry and internal factors when establishing document retention policies and practices.

- "Shredding the E-Mail: When Is It Truly Gone?” (TU-06-9220). The persistence of electronic information demands policies and procedures to reduce legal liabilities and risks.

- "Integrated Document Management Can Manage E-Mail, Too” (DF-15-5031). Enterprises can better comply with legal and ethical dictates regarding e-mail and other business communications by using a document management/record management system to control e-mail.

- "Potential Grows for E-Mail Archival Services” (ITSV-WW-DP-0245). The e-mail archival service market is taking on new importance in the wake of high-profile corporate litigation.

Key Issue

What emerging storage technologies and products will enable new business opportunities, and how will they affect already-established storage markets?