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A TECHNOLOGY MARKET RESEARCH FIRM

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Information Archiving Market, 2013-2017

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SCOPE

This study provides an analysis of the information archiving market in 2013 and its potential growth over the next four years. It provides a detailed analysis of market trends, market size, market share by vendor, forecasts, regulations, as well as vendor products and strategies.

Information Archiving Solutions are products and services that provide interactive, long-term storage of user data, such as email, instant messages, social media, files, Microsoft SharePoint content and other structured and unstructured information. These solutions provide information indexing for easy search and retrieval, retention management, and basic tools for eDiscovery and legal hold. Authorized users and compliance officers are able to access and work with archived information in its original form at any time.

This study looks at two segments of the market:

- **On-premises Information Archiving Solutions** – include information archiving solutions offered as on-premises products for enterprise deployment.

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- **Cloud-based Information Archiving Services** – include cloud-based information archiving solutions delivered as services.

All market numbers, such as market size, forecasts, installed base, revenue information, and any financial information presented in this study represent worldwide figures, unless otherwise indicated. All financial figures are expressed in \$USD.

METHODOLOGY

The information and analysis in this report are based on primary research conducted by The Radicati Group, Inc. Our proprietary methodology combines information derived from three principal sources:

- a. Our Worldwide Database which tracks user population, seat count, enterprise adoption and IT use from 1993 onwards.
- b. Surveys conducted on an on-going basis in all market areas which we cover.
- c. Market share, revenue, sales and customer demand information derived from vendor briefings.

Forecasts are based on historical information as well as our in-depth knowledge of market conditions and how we believe markets will evolve over time.

Finally, secondary research sources have also been used, where appropriate, to cross-check all the information we collect. These include company annual reports and other financial disclosures, industry trade association material, published government statistics and other published sources.

Our research processes and methodologies are proprietary and confidential.

EXECUTIVE SUMMARY

- Information archiving solutions provide interactive, secure long-term storage of electronic business content, including: email, instant messages, social media, file systems, Microsoft

SharePoint content and other structured and unstructured information. In addition to providing information archiving, these solutions provide fast, easy search and retrieval of information, allow organizations to set granular retention policies and provide the foundation for eDiscovery, legal hold, and Data Loss Prevention (DLP).

- Information archiving vendors offer the following deployment options for their archiving solutions:
 - *On-premises Solution* – a common deployment option for businesses that need to handle corporate data internally and have the resources to manage an archiving solution on-premise.
 - *Cloud (i.e. Hosted) Service* – small and medium sized businesses often choose a cloud archiving service because of the reduced administrative requirements, more predictive costs, and low up-front initial investment.
 - *Hybrid* – combines a cloud service and on-premises solution. This deployment strategy is primarily used by very large businesses, which may have different requirements for different departments and/or workgroups. Typically these businesses also need to stagger their data storage to comply with diverse policies. Some businesses will utilize a hybrid deployment model during their transition from on-premises to a cloud-based service.
- One of the primary catalysts driving the rapid adoption of archiving solutions has been the dramatic rise in enterprise content being generated in recent years. Businesses have been forced to reevaluate their corporate storage policies due to the growing number of enterprise content sources that continue to be deployed today. Email has remained the most popular form of content that businesses are most concerned about archiving. However, the wide spread proliferation of solutions such as, Microsoft SharePoint, social media, and enterprise IM is also driving the need more archiving solutions.
- Large sized businesses continue to make up the majority of information archiving customers. The financial services industry has remained the most dominant vertical market deploying archiving solutions in accordance with strict regulatory requirements and compliance procedures. Growth in the government, education, and healthcare sectors, however, is also strong.

- A growing number of businesses in less heavily regulated industries are beginning to deploy information archiving solutions for several different reasons. While not required by law to store and preserve electronic content, many businesses find great value in information archiving solutions that can improve storage management, provide support during litigation, and facilitate better backup and restore capabilities.
- Figure 1, shows the worldwide Information Archiving market revenue from 2013 to 2017. The worldwide information archiving market, including both on-premises and cloud (i.e. hosted) solutions, is expected to be over \$3.6 billion in revenues by year-end 2013, and will grow to \$8 billion in 2017.

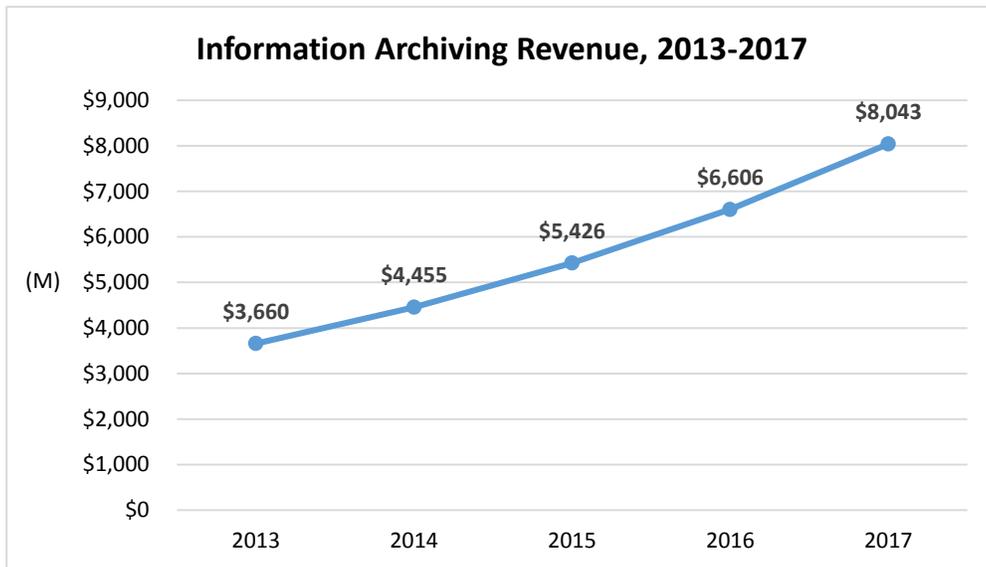


Figure 1: Worldwide Information Archiving Revenue, 2013-2017

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