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E-mail Archiving Market, 2010-2014

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SCOPE

This study provides an analysis of the e-mail archiving market in 2010 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.

E-mail Archiving solutions offer interactive, long-term storage of e-mail in a separate file store, with easy search and retrieval capabilities. These solutions address e-mail storage, as well as regulatory and internal policy compliance issues.

This study looks at two segments of the market:

- **E-mail Archiving Solutions** – include e-mail archiving solutions offered as on-premises products for enterprise deployment.
- **Hosted E-mail Archiving Services** – include e-mail 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 is based on primary research conducted by The Radicati Group, Inc. in 2010. It consists of information collected from vendors, solution providers and corporations via interviews and surveys.

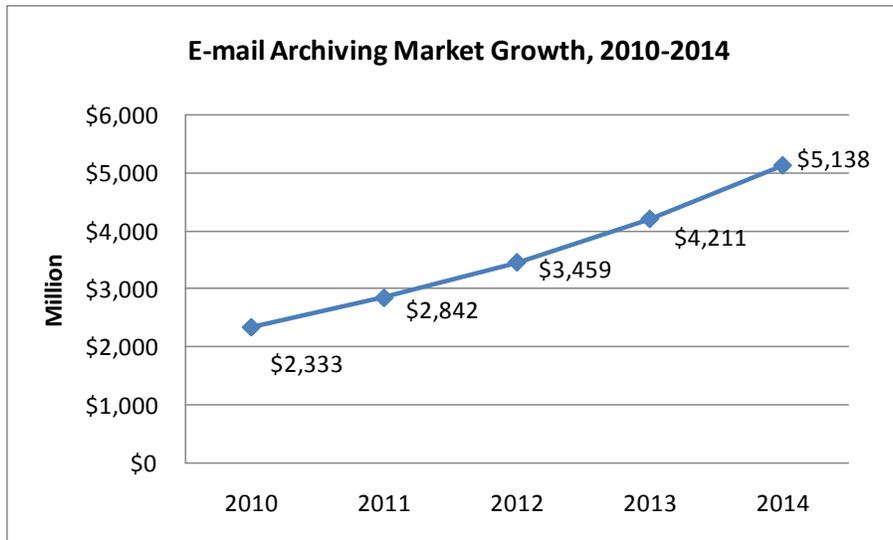
The focus of the research was worldwide with a heavy emphasis on the North American and European markets where most key developments in e-mail archiving are currently occurring.

Secondary research sources have also been used, where appropriate, to cross-check the information collected. These include company annual reports and market size information from various market segments of the computer industry.

EXECUTIVE SUMMARY

- E-mail archiving solutions provide *interactive*, long-term storage of e-mail in a separate file store, with easy search and retrieval capabilities. Authorized users and compliance officers are able to access and work with messages archived in their original form at any time.
- In addition to e-mail, many archiving solutions today can also archive and manage other electronic content, including: PSTs, Instant Messaging, Microsoft SharePoint content, social media content and messages, Web-based e-mail messages, files, and other documents.
- On-premises archiving products continue to be the most popular way to deploy an archiving solution. Today, over 70% of all archiving solutions are sold as on-premises products, compared to less than 30% of archiving solutions sold as hosted services. However, the deployment of hosted archiving solutions is growing at a faster rate than the deployment of on-premises products.
- eDiscovery and Data Loss Prevention (DLP) solutions continue to be the most popular add-ons to archiving products and services. Some vendors and service providers offer these capabilities integrated with their archiving suites, however most have to be purchased separately.
 - *eDiscovery* solutions offer advanced electronic data search, retrieval and analysis tools to review electronic data exchange after the fact.

- *Data Loss Prevention (DLP)* solutions are designed to stop non-compliant messages before they reach a recipient and/or get archived.
- Even though e-mail continues and will continue to be the main reason organizations deploy archiving solutions, many businesses are becoming more interested in expanding the type of content managed by their archives. In terms of additional content managed, besides e-mail, Microsoft SharePoint archiving and Social Media archiving have been the top two recent additions to many archiving suites.
 - As the deployment of Microsoft SharePoint server continues to increase, it only makes sense that more users are starting to exchange important information via SharePoint documents, which before would have been e-mailed to teams as attachments, and as a result, captured via traditional e-mail archiving methods.
 - Social media archiving enables to archive user communications from any public website, such as Twitter, Facebook, LinkedIn, corporate websites, and others. The solutions can take snapshots of static content changes, as well as supervise user messages posted on these websites. The reason for social archiving is the same as for SharePoint archiving – more and more people are using it to exchange information which before would have been sent (and archived) via e-mail.
- Over the past 12 months, two significant acquisitions have taken place in the archiving market. Mimosa was acquired by Iron Mountain, and CA's line of archiving solutions was acquired by Autonomy.
- The worldwide archiving market, including both on-premises and hosted solutions, is expected to reach slightly over \$2.3 billion in revenues by the end of 2010, and grow to over \$5.1 billion by 2014.



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