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Information Archiving Market, 2012-2016

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SCOPE

This study provides an analysis of the information archiving market in 2012 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.
- **Cloud-based Information Archiving Services** – include cloud-based information archiving solutions delivered as services.

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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 2012. 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 information 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

- Information archiving products and solutions provide interactive, long-term storage of electronic business content, including: email, instant messages, social media, files, 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.
- The Information Archiving market has continued its rapid expansion over the last year as it tries to keep pace with the massive amounts of information generated by businesses today. More organizations are recognizing the value of archiving most or all of their information content in a centrally managed repository as a way to abide by regulatory and

industry compliance requirements, as well as reduce and streamline their storage consumption.

- More businesses are recognizing the value of archiving content beyond simply email. Aside from regulatory and compliance adherence archiving solutions provide, the reduction in overall storage requirements is a huge benefit as the growth of electronic content within the enterprise continues to explode. The ability to store and make available nearly all forms of electronic business content, in addition to compressing storage needs, from a centrally managed repository continues to keep interest in archiving solutions strong among today's businesses.
- On-premises information archiving solutions still account for a majority of end users. On-premises solutions account for 69% of information archiving users, while 31% of users are relying on a cloud information archiving service.
- Interest in cloud-based services among businesses has continued to grow over the last year. Cloud-based information archiving services have not been an exception and although this market still trails the on-premises information archiving market in total users and revenues, cloud information archiving services are rapidly outpacing on-premises deployments.
- The primary target that information archiving vendors continue to focus on are larger sized organizations with at least 1,000 employees. Due to compliance and regulatory requirements, the financial services industry is still the vertical market that the majority of information archiving vendors sell to. Strong growth is also occurring in the following vertical markets: government, education, and healthcare.
- 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 back up and restore capabilities.

- Figure 1, shows the worldwide Information Archiving market revenue from 2012 to 2016. The worldwide information archiving market, including both on-premises and cloud (i.e. hosted) solutions, is expected to be over \$3 billion in revenues by year-end 2012, and will grow to \$6.3 billion in 2016.

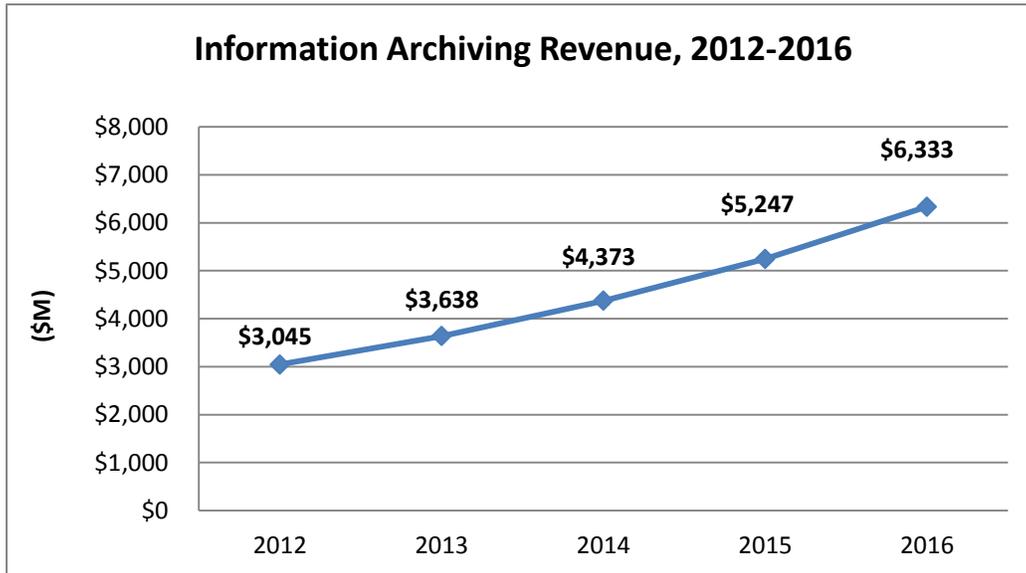


Figure 1: Worldwide Information Archiving Revenue, 2012-2016

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