

Cool Vendors in Archiving, 2009

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The archiving market continues to expand as cool vendors enter with new storage options and services that make archiving more cost-effective and ease the migration of older data. IT organizations should continue to evaluate new, cool vendors as part of ongoing efforts to continue to update and modernize their services.

Key Findings

- Some in-house archiving deployments are beginning to outgrow their initial storage solutions, and will need to migrate to more-scalable and cost-effective solutions. Migration tools and services are now available to speed this transition.
- Ingesting e-mail and file data stored on backup tapes into the corporate archiving system will enable tape retirement and more-efficient management of historical data. Service providers that provide special tools not only speed ingestion, but also provide a defensible process that may be required if data is being restored for discovery purposes.
- New e-mail archiving service providers are entering the market with solutions that have been built specially for the service market. These solutions leverage new technologies that allow them to offer the service at a price that competes successfully against in-house solutions.

Recommendations

- Consider products or services from new vendors as you look to upgrade or modernize your archiving approach. New archiving companies are entering the market with cool solutions that are technically innovative and cost-effective.
- Small and midsize enterprises should include archiving service providers in any archiving selection process. New technologies not only provide for visually usable solutions, but also the cost is often much more competitive than service solutions built on older infrastructures.

ANALYSIS

This research does not constitute an exhaustive list of vendors in any given technology area, but rather is designed to highlight interesting, new and innovative vendors, products and services. Gartner disclaims all warranties, express or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

What You Need to Know

The e-mail archiving market continues to grow as more companies look to better manage the growing stores of e-mail to meet corporate records retention requirements, to better support legal discovery requests, and for better operational management of the e-mail system. New software, appliance and outsourced archiving services are becoming available that offer greater choice and new approaches. Services for ingesting personal stores and information on backup tapes continue to improve, and new solutions are emerging to help companies move from one archiving solution to another. Service providers and enterprises implementing archiving in-house are beginning to focus on the cost and management issues around the archive storage platform, and new solutions are beginning to emerge specifically for archiving.

As the size of archive stores grows, new focus is being placed on the scalability and cost of storage devices. New deduplication technologies and data protection techniques are available in highly scalable arrays that focus on leveraging not only low-cost disk storage but also new software technologies to further cut costs through more-efficient use of the storage resource. Permabit, featured in this research, offers an innovative solution that is gaining market traction as enterprises look to modernize their storage infrastructures with a special focus on improving storage for archived data.

A scalable array will become even more important as companies that have implemented archiving complete the ingestion of personal stores of historical e-mail on desktops and shared servers, and begin to address the stores of backup tapes. These tapes hold historical e-mail saved on this media and in backup format prior to the launch of the company's archive solution. Regardless of whether pending legal action or ongoing cost of media upgrade is escalating the need to move data into the archive, management and storage is an issue. The use of a service from a vendor specializing in this area can expedite the ingestion of the data, and in a way that ensures a legally defensible process. Another service increasingly in demand is one that supports the migration of data to a new archive product or service. RenewData, TransVault Software and Procede are three vendors in the archive migration market. RenewData is featured in this analysis not only because of the breadth and maturity of its support for the ingestion of data from backup tapes, but also for its innovative support for migration of archived data to a new archive system.

For an increasing number of companies, especially those with 10,000 or fewer users, contracting with a service provider to archive e-mail is being selected over in-house solutions. Service providers, such as Sonian and Mimecast, that are leveraging new technologies and are building services based on purpose-built software can deliver a service-based solution at a price that is gaining new respect for outsourcing.

Permabit, Cambridge, Massachusetts, U.S. (www.permabit.com)

Analysis by Carolyn DiCenzo

Why Cool: Permabit provides a massively scalable storage array that is targeted at the archive market. The Permabit Enterprise Archive Data Center Series incorporates the full range of features required to efficiently store and manage data over the long life cycles that are becoming the norm in enterprises. The company shifted in 2007 from delivering only software to offering complete storage solutions, including its Permabit Enterprise Archive Business Series that scales from 8 terabytes (TBs) to 40TBs. In mid-2008, Permabit released the Permabit Enterprise Archive Data Center Series, a modular storage grid architecture that can deliver up to 3 petabytes (PBs) of raw storage, or just over 2PB of usable space by leveraging its patented RAIN-EC data loss protection technology. Although capacity of this magnitude is impressive, what is really cool about the Permabit technology is that it also delivers high availability with maintenance, upgrades and data migration that can be accomplished while the array is still actively supporting the archive application and users. Also included is robust block-level deduplication for optimizing storage capacity. Write once, read many (WORM) capabilities are available for enterprises requiring tamper-proof storage to meet regulatory requirements. Replication is offered for backup to a local or remote site. With all data reduction features included, the storage cost nets out to less than \$1 per gigabyte (GB).

The Permabit Enterprise Archive Data Center Series grid is made up of storage and access nodes. Access nodes provide access to the archive storage through industry standard CIFS, NFS and WebDAV protocols. A storage node handles all data routing and indexing, and provides support for up to 48 nodes per grid, for a total raw capacity of 96TBs per grid. The Storage Pool Expander module provides a "single pane of glass" view that enables unified management of up to 32 grids, thus delivering a total capacity of 3PBs of storage that can manage 256 billion objects. RAIN-EC is Permabit's alternative to RAID 6, delivering protection against node failure with only 33% usage overhead, but with the ability to withstand multiple concurrent drive failures. The scalable data reduction (SDR) technology combines traditional compression techniques with subfile deduplication, resulting in substantial space savings for redundant data. The replication tool leverages SDR to transfer compressed and deduplicated information, increasing performance and reducing bandwidth requirements for off-site replication. High availability and replication modules are also available.

Challenges: Permabit started out as a software vendor, and needs new visibility as a storage solution provider. From its founding in 2000 until it announced its move to start providing complete storage solutions in late 2007, the company offered only the software component, and looked to buyers to integrate it into a complete solution, an approach that did not gain much traction in the market. Other storage grid solutions are available that have many, but not yet all, the features Permabit offers, so the company must be quick to capitalize on its competitive advantage.

Who Should Care: Enterprises implementing archiving solutions, or those starting to outgrow early archiving choices, should look at grid storage solutions that offer not only low cost, but also efficient use of disk capacity, nondisruptive migration to new technologies and data protection that can accommodate large data volumes. Permabit offers such a solution.

Sonian, Dedham, Massachusetts, U.S. (www.sonian.net)

Analysis by Adam Couture

Why Cool: Sonian is a two-year-old Web 2.0 developer leveraging Amazon's cloud infrastructure to deliver managed e-mail archiving services. As a result, the company can offer unlimited storage, and claims the lowest-cost, e-mail archiving service in the market. Called Sonian Archive SA2, the Sonian service archives all major e-mail programs, including Exchange, Lotus Notes, GroupWise, Google and others. Sonian supports archiving of instant messaging (IM) data through integration with third-party IM aggregating technologies, such as FaceTime, Akonix (now part of Quest Software) and IMLogic (Symantec). Sonian also supports the archiving of Bloomberg Message System through integration with the Bloomberg FTP service. Users archive and access e-mail over a virtual private network (VPN). The SA2 software stack is loaded onto a dedicated Amazon EC2 virtual server with Amazon S3 cloud storage backed up and distributed across eight international data centers. When resource-intensive searches are required, Sonian can automatically deploy additional EC2 servers. All customer data is encrypted. Data destruction is accomplished by destroying encryption keys.

Challenges: Sonian's SMTP supervisory capabilities are limited to post-archive searches, which could restrict Financial Industry Regulatory Authority members with stronger SMTP pre-review supervisory requirements. Although Amazon storage is now persistent, many businesses will have concerns regarding what would happen to their data should Sonian exit the market. As a startup, Sonian also faces the daunting task of competing with established vendors that have strong brand recognition and financial resources.

Who Should Care: Sonian should be of interest to customers with e-mail and message archiving requirements lacking the desire or resources to deploy an internal solution. Sonian's low per-seat pricing and unlimited storage will appeal to companies and government agencies faced with eroding budgets. A Sonian partnership could also interest OEMs, resellers and service providers seeking to expand e-mail archiving services.

Mimecast, London, U.K. (www.mimecast.com)

Analysis by Ken Chin

Why Cool: Mimecast is a rapidly expanding U.K.-based, software-as-a-service (SaaS) company. It launched its Unified Email Management services in 2005, providing e-mail archiving as part of its overall e-mail management services including continuity, security, policy administration and e-discovery. The Unified Email Management service makes use of commodity servers to build a multitenant parallel grid technology that is used to provide a distributed processing and storage platform,

Mimecast builds a virtual filing system for each customer that spans multiple disks, with each transaction written to subgrids in each of the multiple data centers. The original e-mail is cryptographically hashed and then split into its component parts. Each component part is cryptographically hashed and single-instance stored (SIS). Mimecast leverages its grid technology and parallel search capability to provide very fast search results, which it believes gives its archiving customers looking to do early case assessment an advantage.

In February 2008, Mimecast started to expand its business beyond Europe and South Africa, resulting in 13% of the revenue now coming from North America. The company has a strong focus on the professional-services market in the U.K. and the legal market in the U.S. It is expanding to healthcare and professional services in the U.S. Services are provided based on a fixed price per user per year, and Mimecast encourages users to contract for archiving, security and continuity as a package.

Challenges: The SaaS market for e-mail archiving has become very competitive during the past year due to market consolidation. Many larger vendors, such as Google, Microsoft and Dell, have substantial resources and, in some cases, the support infrastructures to enable them to win business. Mimecast is still predominately for midsize enterprises and specific vertical markets, but is expanding into larger enterprises. The company needs to grow its customer base and compete against more-established vendors, while leveraging its unified delivery infrastructure.

Who Should Care: Mimecast should be considered by organizations that are looking to outsource their e-mail archiving and to eliminate the challenges of having to deploy an on-premises solution. The company's low-cost offering provides a competitive solution for on-premises deployments for e-mail archiving.

RenewData, Austin, Texas, U.S. (www.renewdata.com)

Analysis by Carolyn DiCenzo

Why Cool: RenewData is of particular interest in the context of archiving for its support for helping companies get historical data into a new archive solution, and increasingly interesting for its support for migrating data from one archive solution to a new one. The company was founded in 2001 to provide a service to law firms by ingesting the data from enterprise backup tapes, removing duplicates, and managing the access to the data for use in a discovery activity. In 2007, the company branched out to add support directly to enterprises that were increasingly handling a greater part of the discovery process in-house. The company's Data Migration Service is a conversion and ingestion process that uses ActiveVault, the company's conversion engine and evidence management platform, to provide a legally defensible process, which results in a data set that can be stored and used at the RenewData site, or transferred back to the customer site in Microsoft Outlook PST or other popular file formats. In July 2008, the company added the Data Migration Service for Symantec Enterprise Vault (EV). This new service provides for the conversion, loading and indexing of historical data from backup tape or from CA's Message Manager archive directly into a Symantec EV archive, which is then installed on the client's EV system as a complete turnkey offering. Google, Mimosa Systems and AXS-

One are also supported as targets with less automation, but with the data transmitted with optimized load features. Once data is migrated into the archive, organizations can apply legal holds and retention policies on the historical data, and can eliminate the records that are not under legal hold or that have exceeded retention requirements. All migrations are performed with a repeatable, defensible process that ensures data integrity.

Challenges: RenewData's biggest competitor for data migration are in-house, manual processes. The company's challenge is to keep the price of its product as low as possible, while helping prospects understand the benefit of using a service from a provider

that is an expert in the process (and in tracking chain of custody), and that can testify to the handling of the data.

Who Should Care: Enterprises dealing with large collections of backup tapes that need to be reviewed as part of a pending (or anticipated) legal discovery, and especially those that have implemented Symantec's EV, Google e-mail hosting, Mimosa NearPoint or AXS-One Compliance Platform solutions, should evaluate the services from RenewData as a way to get historical data or CA's Message Manager archive data ingested into the enterprise's archive system so that data can be managed and produced in a timely and legally compliant way.