

E-Mail Archiving Appliances Target Small and Midsize Organizations With Limited Requirements

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E-mail archiving appliances saw 91% customer growth in 2007, primarily in the small and midsize business (SMB) space, as organizations sought a simple, inexpensive way to address e-mail retention requirements with an in-house solution. Many e-mail server and security providers are adding archiving appliances to their portfolios.

Key Findings

- While e-mail archiving appliance vendors may promote support for thousands of users, most appliances are sold to companies with fewer than 1,000 users.
- E-mail archiving appliances are designed for companies that want to capture all e-mail messages and retain them for a defined period of time.
- Organizations managing multiple discovery requests or those desiring more granular archiving rules should look to more-robust software or service solutions. Most appliance solutions manage legal hold-on messages by adding exclusions to the purge utility, a process that will become increasingly complex to maintain as the number of holds increases.
- The companies covered in this research are small and private. They will need to continue to invest in product and channel development if they are to remain financially viable and competitive.

Recommendations

- Organizations with basic archiving needs and an existing relationship with a vendor offering an e-mail archive appliance solution should include the appliance solution in any archiving evaluation. Carefully check the supplier's ability to support both hardware and software issues.
- Leverage capture via journaling, where available, to ensure that messages between users on the same e-mail server are included in the archive.
- Organizations with limited IT staff and the need for support in handling the questions that may arise regarding the operation of their archiving system or a discovery request should look to an archiving service provider rather than deploy an in-house appliance.
- Understand what the process and cost would be if you outgrow the capabilities of the appliance and need to transfer your data to a different solution.

WHAT YOU NEED TO KNOW

When looking at an e-mail archiving appliance solution, it is important to understand that the ease of deployment and ease of use are accomplished in these systems by keeping the solution simple in its capabilities. As a result, today's appliances have the following characteristics:

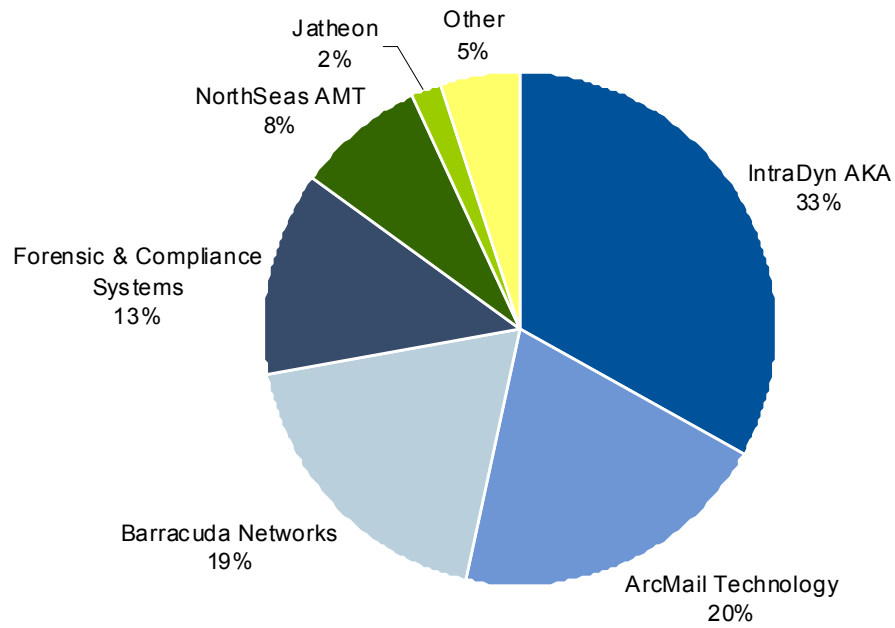
- Typically, appliances capture only e-mail, not contacts or calendar entries or other types of content.
- Most products do not provide any mailbox management features, such as message stubbing, for the active e-mail system.
- Ingestion of existing e-mail will require a special process that, if available from the appliance vendor, is usually at additional cost.
- Most solutions are priced per appliance, not per user. When the capacity of the appliance is reached, a new appliance is needed. Appliances tend to be managed and searched separately. In environments where multiple appliances are required, this will result in increased complexity and cost of operations.
- If journal capture is not available or journaling is not used, the capture of e-mail by the solution is at the e-mail gateway and complete capture depends on all e-mail going through that gateway. If messages between users on the same e-mail server do not go through the e-mail gateway (and in most environments they do not), those messages will not be archived. For SMBs that tend to host all of their users on a single mail server, this could be a significant limitation.
- When deciding which appliance to purchase, understand the level of redundant array of independent disks (RAID) used and the impact it will have on recovery and usable storage space. Also, understand the impact of the level of compression on storage, the approach to storing duplicate messages, the need for temporary storage and index storage requirements.

ANALYSIS

Most e-mail archiving software suppliers, such as Symantec, CommVault and C2C Systems, have resellers that package hardware and software together for their clients. But a few providers offer solutions designed primarily for the prepackaged appliance market. These appliance vendors usually start by designing and delivering their own solutions but quickly move to partnering with the reseller channel, which will either resell the solution as designed, or will create a new solution, adding the vendor's brand of server and disk storage.

IntraDyn and NorthSeas AMT were early entrants, delivering their first solutions in 2004, quickly followed by ArcMail Technology in 2005. Jatheon entered in 2006 and Barracuda Networks in 2007. The Cryoserver software has been available since 2003. It was packaged for the appliance market in 2007 by Forensic & Compliance Systems (FCS). IntraDyn, now owned by Mirapoint, and ArcMail have been most successful in building a rich distribution channel, which has given them their leadership positions, as shown in Figure 1. They will now see strong competition from Barracuda and its established network of worldwide partners. HP has an archiving appliance platform that includes servers, storage and basic search and management software, but software for archiving a specific content type (for example, file, e-mail or SharePoint) is additional. Besides not being a complete plug-and-play e-mail archiving solution like the other vendors in this research, HP is not targeting the SMB with its solution and is, thus, not included in this report.

Figure 1. SMB Appliance Vendor Market Share, YE08*



*Based on a total installed base of 3,940 customers.

Source: Gartner (January 2009)

ArcMail Technology's ArcMail Defender

(www.arcmail.com)

ArcMail Technology is a small technology company based in Shreveport, Louisiana, and it is focused exclusively on providing e-mail-archiving appliances, mostly to companies in the 200- to 3,000-employee range. The eight available appliances range in price from \$3,000 to \$45,000, with a storage capacity of from 500GB to 16TB. Smaller appliances use RAID 1; larger ones use RAID 6.

Custom configurations are available for larger installations. A useful calculator on the ArcMail Web site helps prospects size the appropriate appliance, depending on number of users, the size of typical e-mail volume and the period of retention. A shorter retention period or a lighter e-mail volume could result in the appliance being able to support more users. The company reports that either a three- or seven-year retention period seems most common, though it has customers with a wide range of retention policies. Most sales are in North America through a set of more than 500 resellers, but about 10% of 2008 sales were in the U.K., with plans to expand international sales in 2009. Several customer case studies are on the Web site. More than 75% of its customers use Microsoft Exchange. Groupwise is ArcMail's second-largest base, and its remaining customers are split between Lotus Notes/Domino and other e-mail systems.

ArcMail Defender comes with all the necessary hardware and software to support, capture, index, and store internal as well as external e-mail messages from leading e-mail systems that have a journaling function. For Groupwise, which does not have a journaling function, customers need to install an additional piece of gateway software. Each e-mail and attachment received by the appliance is fully indexed in the Defender database. The raw message bodies are compressed and stored in the Defender file system, using single-instance technology to store messages only once. The product provides integration with Active Directory for user and server authentication. Users can search their own accounts through an Outlook plug-in or via a Web browser application, and administrators can do more global searches. Users can use the archive to recover deleted messages back into their in boxes, if needed.

Barracuda Networks Message Archiver

(www.barracuda.com)

California-based Barracuda Networks is best known for its Spam Firewall appliance that it first shipped in October 2003. It entered the e-mail archiving appliance market in July 2007. The company now reports a customer base of more than 70,000 worldwide, spanning nine product lines, including its popular Spam Firewall Web-filtering solution and now the archiving appliance. More than 90% of e-mail archiving appliance sales in 2008 were in North America as the company rolled out training to its worldwide resellers. The company has offices in 10 countries, including the U.S., the U.K., Japan, China, Australia, Taiwan and India. It receives about 10% of its overall revenue from direct sales, while most come from its extensive reseller channel of more than 7,000 partners.

Capture of new e-mail is accomplished by leveraging the journaling capabilities of the e-mail system, or the appliance can act as a Simple Mail Transfer Protocol (SMTP) proxy, capturing all e-mail that passes through on its way to the e-mail server. Messages are stored once and compressed for storage efficiency. The five available appliances range from \$5,000 with 500GB of RAID 1 storage up to a \$45,000 device with 6TB of RAID 5 storage. Barracuda Networks provides a facility to tag messages in a search set, adding the tags to the metadata associated with the message. These tags can be used to exclude messages from the standard deletion process in the case of a legal hold. The e-mails can be exported or forwarded to a user mailbox.

The company also offers ways to import existing mail and PSTs into the archive. Taking advantage of Barracuda Network's expertise in threat protection, historical e-mails are scanned for viruses, spyware and other malware threats before they are retrieved. For customers of other Barracuda Networks products, the consistency of the user interface across all products will be appreciated. Version 2.0, with release expected at the end of January 2009, will add support for mailbox management through stubbing of messages. The user interface is localized for Spanish, Dutch, Portuguese, Chinese and Japanese, in addition to the standard support for English.

Forensic & Compliance Systems Cryoserver Appliance

(www.cryoserver.com)

FCS is a privately held company headquartered in Ireland with offices in London and the U.S. The company entered the e-mail-archiving market when it became the sole distributor of the Cryoserver product in October 2006 and acquired the intellectual property in September 2007. The Cryoserver software product, supplied originally as a custom-built archiving system, has been available since 2003. Cryoserver Appliance is now the company's primary product, though it will continue to sell the software separately.

Appliances range in capacity from the C100 with 500GB RAID 1 storage designed to support up to 100 users at a list price of \$9,000 up to the C3500 with 8TB of RAID 5 for \$60,000 supporting up to 3,500 users. Messages are captured either via a Messaging Application Programming Interface (MAPI) connection or for Exchange and Lotus Notes, via the journaling feature. All messages are indexed, compressed, encrypted and then digitally fingerprinted to guarantee that the retrieved message is exactly the same as when it was originally stored.

Users can access their part of the archive for viewing and, if necessary, retrieve a deleted message to their in-box. Tools are available to ingest existing mail into the archive, to replicate the archive to a second appliance for backup purposes, and to stub active mail with a pointer to the archive to reduce active e-mail storage space. The archive system can be integrated with an LDAP-based directory service, including Active Directory, for user authorization. A local copy of the archive on the user's PC can be created for mobile Exchange users. Data is deleted from the appliance when the retention date is reached.

Retaining data for specific cases that span the normal retention period is done by using the software to copy the relevant data to a separate location. FCS gets two-thirds of its sales for Cryoserver through resellers in Europe with the rest coming from North America, South Africa and Australia. The product is available in English with Japanese, German, Spanish and Portuguese language versions also available.

IntraDyn (an Independent Subsidiary of Mirapoint) ComplianceVault and Orca eMail Archiver

(www.intradyn.com)

Minnesota-based Intradyn began offering archiving appliances in 2004, when it released ComplianceVault eMail Archiver, targeting the 500- to 5,000-user environment. It now also offers Orca eMail Archiver, which supports organizations with fewer than 500 users. Nearly 40% of Intradyn's customer base has been through partnering with Sony and its reseller channel to deliver Intradyn-branded appliances, but the focus over the past few years has involved growing sales through OEM partners, such as Tangent and Proginet and also Mirapoint, a provider of appliance-based e-mail server and security products that markets an Intradyn-based appliance under the name RazorSafe. In November 2008, Mirapoint acquired Intradyn.

The Orca appliance comes in two models: Blackfish rack mount models and Seawolf desktop solutions. The Sony AIT tape drive is built into the Seawolf model and is available for the Blackfish models for storage of a second copy of the archived data for recovery purposes. The appliances range in price from \$5,000 for an appliance with 500GB of non-RAID disk storage to \$50,000 for a 9.6TB RAID 5/6 solution. Messages are captured using journaling or using SMTP. Only one copy of a unique message or attachment is stored (single-instance store). Access to the archive can be through a Web browser or directly from a plug-in available for Outlook, Lotus Notes or GroupWise. LDAP and Active Directory integration is supported for shared user and group policy management. The product is Unicode-enabled and localized in Japanese and Korean. Asia accounted for 15% of 2008 sales, mostly through Mirapoint. The rest was from North America.

Jatheon Technologies Plug n Comply

(www.jatheon.com)

Canada-based Jatheon has been selectively offering e-mail archiving appliances since August 2006, mainly via direct sales, but with an increased focus on expanding its reseller channel. Jatheon's Plug n Comply appliances range from the 640GB RAID 1 capacity device for \$5,000 to appliances with up to 16TB of disk that are priced on a per-user basis. Data is captured at the e-mail gateway or through journaling and stored using single instancing and compression. Plug-in software is available for Outlook and Notes for user access to the archive. The product includes the capability to ingest existing e-mail into the archive, but upload is also offered as a service. The product currently supports only English, but support for Unicode and localization into other languages is planned.

NorthSeas AMT Advanced Messaging Technology Guard E/N

(www.northseasamt.com)

Canada-based NorthSeas provides software for an appliance that can then be configured with storage (typically network-attached storage). The total solution is then sold via resellers, which market three appliances that range (without archive storage but with internal storage for the metadata database) from \$8,000 for a device that supports up to 500 users, to a \$20,000 appliance that supports up to 2,500 users. For an additional cost of \$800 to \$1,600, a software utility can be purchased for use in ingesting existing messages into the archive.

NorthSeas started out as an appliance vendor in 2004, but moved to selling the software part of the appliance in 2008. The recent addition of a VMware software solution allows end users to install the software in an existing VMware environment to essentially create a virtual appliance leveraging existing servers and storage. The user interface is available in English, French and Dutch.

Messages are captured at the e-mail gateway or via journaling. Single-instance storage of messages is at the total-message level (message and attachment). The purge features an option for deleting messages older than specified data with no exclusions for legal hold. This means that all messages that need to be retained longer than the defined retention period will need to be copied to a different file for saving. North America accounts for 60% of sales; Europe accounts for 30%; and Australia accounts for the remainder.

RECOMMENDED READING

"The Emergence of Integrated Content Archiving Requires an Enterprise Archiving Strategy"

"E-Mail Archiving Market Update, 2008"

"Outsourcing E-Mail Archiving, 1Q08"

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