

Magic Quadrant for Structured Data Archiving and Application Retirement

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Analyst(s): Garth Landers, Alan Dayley, JP Corriveau

Structured data archiving technologies help IT leaders retire legacy applications, reduce capital and operating expenses, and meet governance and compliance requirements. We evaluate vendors offering products and services that provide archiving for databases and data from enterprise applications.

Strategic Planning Assumption

By 2018, 80% of structured data archiving vendors will provide integrated support for unstructured content archiving — up from 30% today.

Market Definition/Description

Structured data archiving is the ability to index, migrate and protect application data in secondary databases or flat files typically located on lower-cost storage for policy-based retention. It makes data available in context, and protects it in the event of litigation or an audit.

Structured data archiving addresses:

- **Storage optimization** — It can reduce the volume of data in production applications and databases via compression and, more recently, copy data management and maintain seamless data access. The benefits of using this technology include reduced capital and operating expenditures, improved information governance, improved recoverability, lower risk of regulatory compliance violations, and access to secondary data for reporting and analysis.
- **Governance** — The technology preserves data for compliance when retiring applications. Structured data is often transactional and related to financial accounts or back-office functions (for example, HR, patient enrollment in healthcare and other use cases that might be regulated) that require information governance, control and security, along with the ability to respond to related events such as audits, litigation and investigation. These and other requirements, such as maintaining information context, can prevent organizations from moving data to lower-cost tiers of storage, or adopting other do-it-yourself approaches. As part of their governance

features, vendors offer varying degrees of retention management, ranging from broad purging capabilities to granular item deletion and integration with records management tools.

- **Cost optimization** — Structured data archiving and application retirement can result in significant ROI. Structured data in legacy systems, ERP systems and databases accumulates over years — and, in some cases, over decades — driving up operational and capital expenses.
- **Data scalability** — The technology can manage large volumes of data resulting from newer applications that can generate billions of small objects. Scalability to petabytes of capacity is required in these cases.

The desire to leverage archives as a secondary data store for big data analytics is driving the growth of the structured data archiving market. Newer market participants are offering alternate ways for managing archived data that involve virtual copies of databases.

- **User access** — Structured data archiving can enable access to "warm" and "cold data," meaning that use cases range from "nearline" archiving, where the archived data is viewed through the native application GUI — known as active archiving, as well as access to data from retired applications, often through SQL queries, reports and application GUI mockups. Full text search is another capability in many offerings. Increasingly, support for big data analytics, such as Hive, Spark and Pig, are being added to enterprise buying requirements.

Magic Quadrant

Figure 1. Magic Quadrant for Structured Data Archiving and Application Retirement



Source: Gartner (June 2016)

Vendor Strengths and Cautions

Actifio

Actifio, based in Waltham, Massachusetts, offers a copy data management approach to reduce storage requirements, essentially virtualizing the database and file systems to make more efficient use of storage resources and accelerating release cycles for test data management. While this is not similar to the traditional approach of rendering database information to a flat file provided by other vendors, it does fulfill the requirement of data reduction, and saves Actifio's customers significant budget for storage. In addition, as a data protection vendor, Actifio supports long-term retention of backup data, which serves an archive function. Its Virtual Data Pipeline (VDP) technology is available in a physical appliance called Actifio CDS and a virtual software appliance called Actifio Sky. Actifio sells direct and through partners and service providers. The main use case for VDP in structured data archiving is to provide multiple copies of databases for development and testing without using more storage, and to enhance productivity. The pricing model is based on the number of TBs of source files or databases being managed.

Plans for 2016 include more partners in the DevOps and service provider markets.

Strengths

- Actifio provides exceptional customer service and support.
- Its partnership with Google Cloud Platform and Amazon Web Services (AWS) lends itself well to potential active/analytics archive-type use cases.
- Actifio offers a straightforward pricing model, and is a lower-cost offering for structured data use cases.

Cautions

- Actifio is not suitable for compliance archiving.
- While used for test data management, adoption of Actifio for other structured archiving use cases is infrequent.
- The vendor does not offer granular data purging.

Data Migration

Based in Kreuzlingen, Switzerland, Data Migration's primary archiving product, JiVS, is sold primarily for SAP archiving and retirement, but is making inroads into JD Edwards, Baan, Siebel, Oracle E-Business Suite, and other commercial off-the-shelf (COTS) and custom applications. JiVS' administration console provides a platform approach, with support for capabilities like data masking, reporting and retention management through configuration. Application retirement is the primary use case for JiVS, and the vendor is experienced with different kinds of legacy systems, including IBM Domino, BPCS, mainframe, AS/400 and others. With increasing emphasis, Data Migration provides its own cloud for midsize enterprises with value-added resellers (VARs) like T-

Systems, offering branded cloud solutions for multinational enterprises. Pricing is flexible, based on three models: (1) single application retirement priced per application and original database volume; (2) per defined scope of applications or modules to retire; or (3) per TB for retirement programs managed with JiVS in the cloud or on-premises. Data Migration is positioned for enterprises looking to retire multiple and different kinds of applications, including SAP. Going forward, Data Migration plans on an increased focus on data governance and more standard business content, including preconfigured view and reports supported by a newly redesigned web user interface. The vendor also plans to strengthen the solution with increased support for archiving of unstructured content and mobile support.

Strengths

- Data Migration provides straightforward access to archived data, and an easy-to-use interface.
- Data Migration supports a variety of common and custom application environments, and has moved past being just an "SAP" archiver.
- The vendor continues to expand its cloud offering, with positive customer feedback.

Cautions

- Data Migration is primarily focused on retirement scenarios and less on active archiving.
- The JiVS business-side user console and experience need to be improved.
- Data Migration lacks significant resources in North America.

DataVard

DataVard, based in Germany, offers its Outboard portfolio for structured data archiving. Outboard supports SAP and consists of Outboard modules for Analytics (NLS), Housekeeping, Transactional Systems and Documents. The vendor also provides two application performance monitoring systems, BW Fitness Test and ERP Fitness Test. The product portfolio addresses SAP document and transaction archiving, in addition to housekeeping, giving administrators the ability to clean up and purge unnecessary system data. DataVard is a specialist in business warehouse (BW) archiving, offering nearline storage support for analytics and access to "warm" data. The vendor is at the forefront of addressing Hadoop-based archive data lakes for content that is generated in SAP Hana. The offerings are sold through a number of VARs, including Hewlett Packard Enterprise (HPE) and a small direct sales force. The products are priced on perpetual, subscription and a new cloud-based model, offering support for AWS and Microsoft Azure, with pricing based on storage capacity savings.

Looking forward, DataVard plans to offer more Hadoop-based capabilities with support for Hive, Spark and Impala, and improved data automation, as well as a WORM-based solution for meeting compliance requirements.

Strengths

- DataVard provides favorable enterprise pricing without mapping to all SAP users like other offerings in this market.
- The vendor is an early mover in enabling Hadoop data lakes for SAP.
- NLS is a strong product offering that requires less administration than most market offerings for SAP archiving.

Cautions

- DataVard would benefit from better job progress reporting.
- Its customer base for archiving is small.
- DataVard does not have strong retention management/legal hold capabilities.

DCSoftware

DCSoftware is based in Hopkinton, Massachusetts. Its Arctools offering has a primary focus on JD Edwards archiving, utilizing dozens of predefined purge modules. Arctools supports Oracle, IBM i and Microsoft SQL Server databases, although the IBM i offering is menu-driven and written on a different codebase than the Oracle and SQL Server products, which provide a GUI front end. Arctools also offers an Oracle E-Business Suite that has had minimal traction to date. The archiving method is straightforward, basically copying from a live table to an identical table in the archive. Reporting is only through the native applications for both the live system data and archive data. Arctools recently added a cloud offering, where both the product and data can be managed in the cloud platform of the user's choice, or the archiving product can be implemented on-premises with the data stored in the cloud. Licensing can be either perpetual or subscription-based.

Arctools is a solid choice for JD Edwards archiving, and has over 400 customers archiving from that platform.

Strengths

- Arctools has deep knowledge of JD Edwards' systems and acts as an active extension of the live database.
- Overall, the product is easy to use, with straightforward administration and good documentation.
- Data integrity validation options before, during and after moving data to the archive are robust, including full batch authentication before final write, and the ability to stop and restart purges.

Cautions

- Arctools does not have granular retention management capabilities, nor built-in e-discovery capabilities.

- Arctools relies on the host JD Edwards for searches and reports, and does not provide direct links for ODBC or JDBC reporting tools.
- Arctools is for active archiving use cases only, not for application retirement.

Delphix

Delphix, headquartered in Menlo Park, California, offers the Delphix data virtualization platform. The platform supports Oracle E-Business Suite, PeopleSoft, Siebel, JD Edwards, Baan, SAP and other application environments, as well as IBM DB2, Oracle, SQL Server and other databases. The offering creates and manages virtualized copies of the database/application environment, and provides management controls, including retention and access, as part of the life cycle. Delphix has recently seen an upsurge in SAP archiving opportunities, and is providing governance and data modeling capabilities to support financial services for Dodd-Frank compliance initiatives. Delphix data virtualization is largely sold by a direct sales force through which pricing is offered in server- and term-based models. When selling indirectly via managed service providers or other channel partners, a variety of licensing mechanisms are available to align with the partner's business model. Support for DB2 on z/OS and SAP Hana are on the roadmap. In addition, Delphix is releasing support for Cassandra, Hadoop and MongoDB.

Strengths

- Delphix is very easy to use from an administrator and end-user standpoint.
- Delphix supports a number of different use cases and value propositions; buyers can apply it to archiving, data protection, application development and more.
- Delphix has the fastest deployment times of all the vendors in this Magic Quadrant.

Cautions

- Delphix offers a platform approach that is not cost-effective for cold data or one-off archiving projects.
- Delphix is not suited as a long-term archive. If used as a long-term archive, the Delphix virtual machine instance needs to be converted as a flat file for later access.
- Structured data archiving is a secondary use case for Delphix, with its main focus being test/development productivity and storage management.

EMC

EMC is based in Hopkinton, Massachusetts. EMC InfoArchive provides a secure, scalable compliant repository capable of supporting both structured and unstructured archived and retired data. InfoArchive debuted in 2014, but has been offered as a solution since 2008. The product can be used for database table and data, file, and collaborative application (for example, IBM Notes, Microsoft SharePoint and EMC Documentum) archiving and decommissioning. Various content and

platform connectors are available directly from EMC, via partners and various extraction, transformation and loading (ETL) tools. Data is loaded and stored in a unified repository in an open format using XML, and all content stored can be accessed via granular full-text searches, JDBC reporting tools, and, in some cases, native applications via partner technologies. InfoArchive is a scalable platform with the ability to manage many petabytes (PBs) of data. The latest version of InfoArchive is tightly integrated with EMC's Isilon (including Isilon SmartLock), and offers support for Hadoop Distributed File System (HDFS) and EMC Elastic Cloud Storage (ECS). Alongside on-premises deployments, InfoArchive can be run as a cloud service. EMC integrates with SAP, enabling archiving and retiring into EMC InfoArchive. Documentum Archive Services for SAP integrates with SAP, supporting both SAP ArchiveLink and SAP information life cycle management (ILM).

EMC has demonstrated an ability to support use cases where unstructured/structured requirements converge. Buyers should consider InfoArchive if the organization has a need for a unified repository supporting multiple data types from multiple applications, and has strong retention management and reporting requirements. As the platform grows, EMC is planning on increasing scalability into the hundreds of PBs, and to emphasize a focus on key verticals and use cases, such as real-time analytics, financial services, life sciences and clinical archiving, and SAP ILM. In addition, the vendor is taking steps to improve deployment times and reduce integration complexities.

Strengths

- Tight integration with the EMC stack, including Centera, Isilon and ECS, offers EMC customers strong combined archiving, compliance and retention capabilities.
- InfoArchive delivers good reporting and user access to archived data.
- InfoArchive meets many government and industry standards, and nicely meets legal and compliance needs.

Cautions

- InfoArchive is still a relatively new product, and the vendor is working toward greater application domain expertise.
- Access from native applications into the InfoArchive repository can be difficult to set up and customers cite this as not being a seamless exercise.
- InfoArchive has many solution components, thus deployment times can be long.

HPE

Hewlett Packard Enterprise (HPE), based in Palo Alto, California, offers HPE Structured Data Manager for database archiving and application retirement, and the offering now resides within the new HPE Information Management and Governance division. A major initiative for the vendor is to focus more on specific verticals, such as life sciences and pharmaceuticals, and the energy and utilities market. HPE Structured Data Manager supports a broad variety of applications, such as Oracle E-Business Suite and PeopleSoft, and underlying databases, including SQL Server and DB2.

Database-to-database and database-to-file archiving are both supported, and the product is integrated with HPE Intelligent Data Operating Layer (IDOL), enabling contextual search and retrieval across production and archive databases. On-premises, private, hybrid and public cloud (such as HPE Helion OpenStack and Amazon Simple Storage Service [S3]) implementations are supported. HPE has created strategies for go-to-market with HPE 3PAR StoreServ and StoreAll storage products. The product is integrated with HPE Records Manager to address broader records management, compliance, and governance needs. SAP archiving is supported via SAP ArchiveLink and through a partnership with Attunity.

HPE Structured Data Manager is best-suited for enterprises seeking database archiving or application retirement in Oracle environments. HPE is focusing heavily on "retirement in a box" for ERP systems such as PeopleSoft, Siebel and SAP. In addition, identifying and securing personal/sensitive data is a major upcoming emphasis.

Strengths

- Pricing continues to be a positive for HPE, with customers charged per source database instance. This enables the vendor to service smaller archiving initiatives and to grow as customers' needs grow.
- HPE has fulfilled many promises around performance, ease of use, delivery of additional modules and better subsetting.
- HPE Structured Data Manager has good retention management capabilities, and offers the ability to store archived data in HPE Records Manager.

Cautions

- HPE's customer base comprises primarily Oracle E-Business Suite users. Buyers should carefully vet SAP and other offerings to ensure needs are met.
- The vendor's support, documentation and website need to be improved to provide an easier customer experience.
- In the past, HPE has been slow to deliver Oracle patches and other fixes to stay abreast of current database and application versions. Vet its roadmap to ensure that recent improvements continue.

IBM

IBM did not respond to requests for information regarding this research. Therefore, Gartner's analysis is based on other credible and accepted public sources. Based in Armonk, New York, IBM's structured data archiving is InfoSphere Optim. Optim supports a number of application sources, including Oracle E-Business Suite, PeopleSoft, Siebel, JD Edwards and SAP, along with DB2, Informix, Oracle and SQL Server databases. The Optim product family was recently aligned within IBM's Information Lifecycle Governance group portfolio to deliver solutions for information governance, including archiving of both unstructured and structured content. Optim has broad

support for governance capabilities such as legal hold and retention policy management. IBM InfoSphere Optim is suitable for large-scale application archiving and retirement initiatives, and has found success with application retirement within healthcare, financial services and distribution.

Strengths

- Optim has a large referenceable base of customers for mainframe environments, including application retirement.
- IBM offers a broad breadth of options in terms of application and database support.
- The vendor has deep information governance expertise and services to support structured data use cases.

Cautions

- IBM is geared toward larger archiving and retirement scenarios. It does not scale down from a price perspective.
- Optim writes to a proprietary format for archiving.
- IBM recently migrated certain aspects of product development and support to its partner, Unisoft Communication.

Informatica

Informatica, based in Redwood City, California, has been providing structured data archiving through its Informatica Data Archive for the last 13 years. More than 5,800 enterprises use Informatica to save money on application data and database storage on-premises and in the cloud. As a leading provider of data integration software, Informatica partners with global system integrators like Accenture, Capgemini and Cognizant. It also leverages an ecosystem of more than 400 partners. Informatica's data integration software platform, Informatica Data Archive, provides the broadest range of application and database connectors for providing compliance and data reduction. Application retirement is also provided for many enterprise business software platforms, as well as APIs for other applications in need of retirement.

In 2016, the vendor's focus will be on the healthcare and insurance markets, as well as on integration across the other Informatica products to leverage big data repositories and cloud deployments.

Strengths

- Informatica offers a solution for very large databases, and has the most out-of-the-box connectors for applications and databases.
- The vendor has increased its partner ecosystem, allowing it to scale operations and provide knowledgeable expertise to archiving use cases.

- Informatica has a robust product development schedule and is responsive to customer requests for product enhancements.

Cautions

- Informatica is lagging in providing cloud-based deployment options.
- The vendor is not well-suited for projects that encapsulate comprehensive unstructured and structured data requirements.
- Informatica only provides SQL access for data stored on Hadoop, and no support for Hadoop analytics tools.

OpenText

OpenText, based in Waterloo, Ontario, Canada, provides structured data archiving as part of its overall Enterprise Information Management portfolio to secure key business documents, files and email within a single source platform. OpenText Archive Center delivers solutions for archiving and managing the information life cycle of a broad range of enterprise information, including email, files, SharePoint data and structured information, such as ERP data (SAP and Oracle), instant messaging, and web and social content, into a single managed repository. In addition to its own sales and partners, OpenText is sold through SAP sales teams for archiving of SAP data and documents. The SAP archiving solutions ensure business documents are securely archived and attached to SAP transactions and processes for long-term retention. The OpenText InfoFusion platform is used to provide application retirement while integrating document access to archived data with current applications. Most pricing is based on the number of users of the products deployed.

In 2016, the focus will be on expanding application retirement professional services, and adding more cloud data centers to service the needs of clients requiring data stored in the country of origin.

Strengths

- OpenText supports a wide array of deployment options when used with its Enterprise Information Management platform.
- OpenText is the market share leader for SAP archiving and enjoys a strong business relationship with SAP.
- The vendor is a good choice for projects that involve unstructured content and business process management.

Cautions

- For stand-alone data archiving projects, OpenText has been rarely applicable because of the necessary investment in its overall platform.
- The total cost of ownership for OpenText structured data archiving can be high when deployed on-premises.

- Customer support continues to be an area in need of improvement for the vendor.

PBS Software

PBS Software, based in Bensheim, Germany, is now entering its 25th year as a provider of SAP archiving solutions. PBS Software offers a portfolio of products, including the Database Analyzer series for both ERP and BW, and over 30 modules that map to SAP applications such as FI, CO, MM, SD and others. In addition, PBS offers "nearline" storage support for SAP IQ and CBW. PBS ContentLink supports the archiving of structured and unstructured data via SAP ArchiveLink/ WebDAV, and the product supports SAP ILM. The PBS Enterprise Content Store is often used for retrieval and filtering of data from decommissioned systems. The PBS portfolio is typically used to improve SAP system performance, and is differentiated through tight integration with SAP modules that enable end-user access. Increasingly, customers are purchasing PBS with an eye toward analytics of data in nearline environments, such as for SAP BW and Hana. Pricing is based on the number of dedicated named SAP users on a perpetual basis, with its Enterprise Content Store product offered on a per-PC-user basis. There is also support for SaaS pricing. The products are sold through VARs, such as Dolphin Software Solutions in the U.S.

Looking ahead, PBS plans enhancements to integrate external data into SAP, to address big data use cases.

Strengths

- PBS customer support is highly rated and effective at problem resolution.
- PBS products are very easy for end users to use.
- The vendor is a stable, long-running provider in the market. It has a track record of continual investment in and adaptation to the SAP ecosystem.

Cautions

- PBS project deployment times are among the longest of the vendors in this year's Magic Quadrant.
- Pricing is based on the number of SAP users in the enterprise.
- Indexing large data volumes in PBS is time-consuming for SAP Archive Development Kit (ADK)-based indexing.

Solix Technologies

Solix Technologies, based in Santa Clara, California, offers Enterprise Data Management Suite (EDMS) for the archiving of Baan, JD Edwards, Oracle E-Business Suite, PeopleSoft, Siebel and SAP. In addition, the vendor has Solix Big Data Suite for Hadoop-based archiving of structured and unstructured content. Solix Technologies' offerings are available via a broad variety of platforms, including on-premises, appliance, private/hybrid cloud and SaaS. Historically, the vendor has been known for addressing midsize enterprises, but has increasingly drawn interest from and won

opportunities with larger deployments. For some application retirement use cases, Solix utilizes a virtual print mechanism, allowing structured and unstructured data to be preserved in readable report formats — an approach that saves time and reduces long-term preservation complexity. Perpetual, subscription- and appliance-based pricing are available. The vendor's portfolio supports Apache, Cloudera and Hortonworks Hadoop distributions as repositories for archived data. AWS, Microsoft Azure, Oracle Cloud, SAP Hana and Rackspace cloud options are available, and, in 2016, Solix plans to offer its own SaaS-based archiving.

Strengths

- Solix Technologies continues to offer cost-effective solutions for structured data archiving.
- Of all the vendors evaluated in the 2016 Magic Quadrant, it is rated highest among buyers for its ease of deployment.
- Solix Technologies supports a wide array of big data visualization tools, such as Tableau, Splunk and Datameer,

Cautions

- Solix Technologies has good professional services, but personnel can be stretched thin.
- Adoption of SAP archiving from the vendor is low, and domain expertise in that area is needed.
- Archive runtime performance is an area that can be improved.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

No vendors were added to this Magic Quadrant.

Dropped

Teradata (RainStor)

Inclusion and Exclusion Criteria

To be included in the Magic Quadrant for Structured Data Archiving and Application Retirement, a vendor must:

- Offer products that meet the definition for structured data archiving and application retirement detailed in the Market Definition/Description section of this research.
- Be the developer of the product, and not just a reseller or VAR.
- Support a growing base of customers, including at least 15 enterprise customers that are using the software in a production environment.
- Have a presence in at least two geographies (North America, EMEA, Asia/Pacific region, South America) worldwide and be industry-independent.
- Provide its solution as an on-premises software product, a SaaS offering or some combination.
- Achieve more than \$3 million in new license or maintenance revenue annually.

Evaluation Criteria

Ability to Execute

Product or Service: An evaluation of the features and functions of the vendor's structured data archiving solution, including those related to:

- Archiving to an alternate (nonproduction) database or file format
- Maintaining referential integrity (even for the most complex data models)
- Seamless access to archived data from the original application or via alternate methods (search, reporting)
- Security, access control and audit logs
- A roadmap supporting plans for big data initiatives and analytics, including Apache Hadoop

Higher ratings are:

- Assessed for support for data validation, broad application support (including for custom and legacy applications), data retention and purge management, data discovery, data masking and test data management, and support for legal hold
- Assigned to solutions with strong archive architectures, policy-based archiving and storage management features, quality of user experience, and support for unstructured content

Overall Viability: Includes an assessment of the vendor's overall financial health, the financial and practical success of the structured data archiving business unit, and the likelihood of the individual business unit to continue to invest in a structured data archiving solution.

Sales Execution/Pricing: The vendor's capabilities in all sales activities, and the structure that supports them. This includes pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Track Record: Includes the ability to respond, change direction and be flexible as market dynamics vary. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The effectiveness of the vendor's marketing programs, and its ability to create awareness and mind share in the market. This criterion assesses whether the messaging is clear, whether the vendor provided references that used the unique features of the product in its target environment, and whether the promotion of the product on the vendor's website is effective.

Customer Experience: The quality of the customer experience, based on reference calls and Gartner client teleconferences (inquiry).

Operations: The ability of the organization to meet its goals and commitments in an efficient manner. Past performance is weighted heavily.

Table 1. Ability to Execute Evaluation Criteria

| Evaluation Criteria | Weighting |
|------------------------------|-----------|
| Product or Service | High |
| Overall Viability | High |
| Sales Execution/Pricing | High |
| Market Responsiveness/Record | Medium |
| Marketing Execution | Medium |
| Customer Experience | High |
| Operations | Low |

Source: Gartner (June 2016)

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' needs, and to translate those needs into the appropriate features in the structured data archiving product, along with the ability to anticipate market trends (for example, the requirement to support heterogeneous applications and databases, including SAP) and to adapt quickly via new features, partnerships or acquisitions

Marketing Strategy: A clear set of messages that positions the product and differentiates it from competitors, consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements

Sales Strategy: The vendor's strategy for selling to its target audience, including an analysis of the appropriate mix of direct and indirect sales channels

Offering (Product) Strategy: An evaluation of the vendor's strategic product direction, including an analysis of its roadmap

Business Model: The soundness and logic of a vendor's underlying business proposition

Vertical/Industry Strategy: The vendor's strategy for meeting the specific needs of individual vertical markets and market segments (for example, healthcare or pharma regulatory compliance, or state and local government information retention and disclosure requirements)

Innovation: The vendor's product leadership and ability to deliver archiving features and functions that distinguish the vendor from its competitors

Geographic Strategy: The vendor's strategy for penetrating geographies outside its home or native market

Table 2. Completeness of Vision Evaluation Criteria

| Evaluation Criteria | Weighting |
|-----------------------------|-----------|
| Market Understanding | High |
| Marketing Strategy | Medium |
| Sales Strategy | High |
| Offering (Product) Strategy | High |
| Business Model | Low |
| Vertical/Industry Strategy | Medium |
| Innovation | High |
| Geographic Strategy | High |

Source: Gartner (June 2016)

Quadrant Descriptions

Leaders

Leaders have the highest combined measures of Ability to Execute and Completeness of Vision.

They may have the most comprehensive and scalable products. They have a proven track record of financial performance and an established market presence. In terms of vision, they are perceived as thought leaders, with well-articulated plans for ease of use, product breadth and how to address scalability. For vendors to have long-term success, they must plan to address the expanded market requirements for structured data archiving and application retirement, including support for Apache Hadoop and big data, support for the cloud, solid relevant SAP archiving functionality, and a strong

administrative UI. Leaders not only must deliver to current market requirements, which continue to change, but also must anticipate and begin to deliver on future requirements. A cornerstone for Leaders is the ability to articulate how these requirements will be addressed as part of their vision for expanded archive management, including unstructured content. As a group, Leaders are considered part of most new purchase proposals, and have high success rates in winning new business. There are six Leaders in this Magic Quadrant: Delphix, EMC, IBM, Informatica, HPE and Solix Technologies.

Challengers

Challengers can execute today, but have a limited or an evolving vision. They have capable products and can perform well for many enterprises. These vendors have the financial and market resources and capabilities to become Leaders, but may have elected to focus more heavily on one vertical industry or one structured data archiving use case. There are two Challengers in this Magic Quadrant: OpenText and PBS Software.

Visionaries

Visionaries are forward-thinking, but their execution has not propelled them into a leadership position. These vendors are differentiated by product innovation, but they have not achieved the sales and marketing success required to give them the high visibility of Leaders. There are no Visionaries in this Magic Quadrant.

Niche Players

Niche Players are narrowly focused on an application type, such as SAP, offer some degree of structured data archiving as an adjunct to enterprise information archiving (unstructured content archiving, such as email, files or SharePoint) or offer broad capabilities without the relative success of their competitors in other quadrants. This is acceptable for a number of buyers, and some of the Niche Players' offerings are used successfully by very large global enterprises. Niche Players may focus on a segment of the market and do it well, or they may simply have modest horizons and lower overall capabilities compared with competitors. Others are simply too new to the market or have fallen behind, and, although they're worth watching, they have not yet developed complete functionality or the Ability to Execute. Niche Players in this Magic Quadrant are Actifio, DCSoftware, Data Migration and DataVard.

Context

Placement on the Magic Quadrant is based on Gartner's view of a vendor's performance against the criteria noted in this research. Gartner's view regarding vendor placement on the Magic Quadrant is heavily influenced by surveys completed by the vendors, and several hundred inquiries and one-on-one conversations at Gartner conferences conducted during the past 12 months with our clients on the topic of structured data archiving and application retirement. In addition, the Magic Quadrant methodology includes the solicitation of references from each vendor; for this

Magic Quadrant, Gartner conducted more than 60 reference checks from a set of customers provided by each vendor..

This Magic Quadrant does not rate only a product's quality, capabilities and features. The product is an important part of the rating, but the vendor's ability to acquire and support customers is equally important, as is its ability to grow product and service revenue. A vendor that offers a strong, technically elegant product, but is unable or unwilling to invest in marketing and sales to generate revenue and growth, will find itself unable to invest sufficiently in development.

Market Overview

Based on Gartner's estimates, the size of the structured data archiving and application retirement market is \$287 million and growing at a compound annual growth rate of 10%. The market, which started as a cost containment measure for data growth in active applications, has largely transitioned to a vehicle for application retirement as the primary use case. As organizations move toward long-term preservation of application data, retention and storage management become critical requirements, and buyers look to vendors to provide systematic, scalable means of retiring multiple applications simultaneously. The market is in transition as enterprises are gaining maturity around information governance practices and policies for all content types. As a result, there is a greater appetite for more comprehensive solutions with broader value propositions and support for more infrastructure and deployment options, unstructured content, and integration with enterprise software suites and tools. Some key trends for this market include:

- **Increasing buyer interest in managed solutions** — With some application retirement solutions requiring years of effort, there is demand for fully managed service offerings that include services and software.
- **Increased verticalization** — Some vendors are differentiating their offerings by providing solutions that address specific regulatory and business process concerns, most notably in healthcare.
- **Cloud adoption** — Structured data archiving has historically lagged other content types for cloud archiving; however, enterprise inquiry in this area has increased. This is a natural intersection with the desire toward fully managed solutions.
- **DIY archiving** — Buyers that, in the past, opted not to buy an independent software vendor solution and do nothing are looking toward Hadoop distributions and other means of storing application data with lower costs and without structured data archiving vendor assistance. For these enterprises, the term "data lake" has become a euphemism for archiving.
- **Evolution of SAP use cases** — Enterprises moving to SAP Hana have decisions to make about how to store and utilize legacy data. Vendor progress in this area is mixed and, overall, offerings are a work in progress.

Gartner Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

"How Markets and Vendors Are Evaluated in Gartner Magic Quadrants"

"Use Hadoop for your Big Data Archiving"

"Build a Leaner Data Center through Application Retirement"

Evidence

Placement on the Magic Quadrant is based on Gartner's view of a vendor's performance against the criteria noted in this research. Gartner's view regarding vendor placement on the Magic Quadrant is heavily influenced by surveys completed by the vendors, and several hundred inquiries and one-on-one conversations at Gartner conferences conducted during the past 12 months with our clients on the topic of structured data archiving and application retirement. In addition, the Magic Quadrant methodology includes the solicitation of references from each vendor; for this Magic Quadrant, Gartner conducted more than 60 reference checks from a set of customers provided by each vendor.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and

business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either

directly or through partners, channels and subsidiaries as appropriate for that geography and market.

GARTNER HEADQUARTERS**Corporate Headquarters**

56 Top Gallant Road
Stamford, CT 06902-7700
USA
+1 203 964 0096

Regional Headquarters

AUSTRALIA
BRAZIL
JAPAN
UNITED KINGDOM

For a complete list of worldwide locations,
visit <http://www.gartner.com/technology/about.jsp>

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