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The Forrester Wave™: Enterprise File Sync And Share Platforms, Hybrid Solutions, Q2 2016

The 10 Providers That Matter Most And How They Stack Up

by Cheryl McKinnon
April 26, 2016

Why Read This Report

In our 37-criteria evaluation of enterprise file sync and share (EFSS) providers with hybrid or on-premises deployment options, we identified the 10 most significant — Accellion, Acronis, BlackBerry, Citrix, Egnyte, IBM, Microsoft, Syncplicity, Varonis, and VMware — and researched, analyzed, and scored them. This report shows how each solution provider measures up and helps enterprise architecture (EA) professionals make an informed choice when a hybrid or on-premises service for file sharing and storage is the preferred approach.

Key Takeaways

Accellion, Microsoft, Egynte, Syncplicity, IBM, BlackBerry, And VMware Lead The Pack
Forrester's research uncovered a market in which Accellion, Microsoft, Egnyte, Syncplicity, IBM, BlackBerry, and VMware lead. Acronis and Citrix offer competitive options. Varonis lags behind.

Flexibility Of Deployment Options Makes Hybrid An Important Segment Of EFSS
Enterprises still hold large volumes of documents on-premises in file shares, storage devices, and ECM systems. While cloud applications are on the rise, the critical content that needs to be shared often sits in-house. Hybrid EFSS providers give EA pros the flexibility to deliver a great file-sharing experience without requiring migration efforts.

Security, Search, And Collaboration Capabilities Are Key Differentiators
Core capabilities, including file sharing, secure viewing, and mobile support, are table stakes in the EFSS market. EA pros should dig deeper into usability, search, collaboration, and security capabilities to assess vendors that are a good fit.

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Notes & Resources

Forrester conducted product evaluations in January and February 2016, interviewed 10 vendors, and surveyed the vendors' customer references. Vendors include Accellion, Acronis, BlackBerry, Citrix, Egnyte, IBM, Microsoft, Syncplicity, Varonis, and VMware.

Related Research Documents

The Forrester Wave™: ECM Business Content Services, Q3 2015

The Forrester Wave™: Enterprise File Sync And Share Platforms, Cloud Solutions, Q1 2016

Vendor Landscape: Document-Centric Collaboration, Q4 2015

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Not All Enterprises Are Ready To Go All-In On Cloud

Enterprise file sync and share is firmly entrenched inside the enterprise, and technology management buyers no longer view it as a primarily consumer-driven technology. The broader market, however, is crowded, with a multitude of vendors offering relatively comparable options. For 2016, Forrester has segmented the most relevant EFSS vendors into two groups. These two segments are, first, products that are native cloud-based software-as-a-service (SaaS) offerings, and second, products that target the hybrid cloud or on-premises deployments. Leaders in the cloud EFSS market are investing in capabilities that make them contenders for tomorrow's systems of record for corporate content; we've assessed them in the "The Forrester Wave™: Enterprise File Sync And Share Platforms, Cloud Solutions, Q1 2016."[1] This evaluation for enterprise file sync and share platforms assesses the vendors that address the hybrid and/or on-premises use cases.

Files Still Reside Predominantly On-Premises, Even As The Shift To Cloud Begins

Hybrid EFSS vendors deliver secure connectors to existing content applications or storage locations, which may be on-premises, cloud, or a mix of both. Flexibility of deployment options is what gives these vendors competitive differentiation over the cloud-only providers. Hybrid EFSS providers allow enterprises to gain the benefits of mobile-friendly, secure file-sharing technology without the burden of migrating content to yet another repository. EA pros, when assessing EFSS requirements, must take this content repository question into account. EA pros must also consider that:

› **Cloud EFSS tools may compete with ECM, while hybrid providers complement it.** Enterprise content management is currently an approximately $8 billion market that is under pressure as cloud alternatives emerge and traditional vendors struggle to port legacy offerings to managed services.[2] As cloud EFSS providers enhance their repository services, they are increasingly viewed as credible alternatives to manage business content.[3] Many of the EFSS hybrid vendors in this Forrester Wave have connectors for mainstream ECM systems such as EMC Documentum and Microsoft SharePoint, among others. Some hybrid providers also use the content management interoperability services (CMIS) standard to ease integration with a broad set of content applications. These integrations allow documents to reside in their home repository systems but be shared and/or synched across teams and devices.

› **Businesses still have hundreds of terabytes of "unstructured data" on-premises.** Forrester's data shows that the volume of files residing on internal network drives or content repository systems continues to be substantial. In 2015, 47% of data and analytics decision-makers stated that their enterprises held between 1 TB and 99 TB of unstructured data within their company networks. A further 21% held 100 TB to 999 TB, with 14% holding over 1,000 TB in-house.[4] In organizations where active, useful content is stored on-premises, there may be little appetite to move, migrate, or duplicate content to take advantage of EFSS.

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› **EFSS tools from existing solution providers may be a good fit.** ECM and archiving vendors have also stepped up to offer secure EFSS capabilities as an integral part of their products. EA pros with deep investments in existing content applications should assess these existing suppliers to see if they offer the range of mobility, security, usability, and integration capabilities to meet EFSS requirements. Examples of ECM vendors with EFSS capabilities include Alfresco Software, Hyland Software, iManage, Lexmark International, M-Files, and OpenText. Archiving providers include CommVault and Hitachi Data Systems. A typical limitation of these offerings, however, is the ability to integrate with a broad range of content applications — many integrate only with their own repository systems.

› **EFSS is a crowded market with many vendors worthy of investigation.** There are dozens of EFSS providers that may fit particular needs. Vendors with solid offerings that did not meet one or more inclusion criteria for this Forrester Wave include AeroFS (which uses a chat-channel approach to file sharing), Ctera, FinalCode (a relatively new vendor with success and backing in Asia), and ownCloud (one of the few open source options in the EFSS market). AvePoint offers SharePoint-specific EFSS extensions, and Metalogix offers tools to bring consistent governance to cloud file-sharing systems.

Flexibility Of Deployment Options Is The Hallmark Of Top Hybrid EFSS Providers

The top EFSS providers in this evaluation benefit from their flexible deployment models, as they serve enterprises that are at various stages of cloud adoption. Hybrid EFSS offers EA pros a way to cope with the reality that key enterprise applications, storage locations, and content repositories will be scattered across a mix of on-premises, public, or private cloud services for the near future. This means that enterprises can:

› **Adopt EFSS and meet data sovereignty requirements.** Businesses operating in jurisdictions with stringent data protection laws often prefer content-sharing systems that provide granular controls over file storage. Enterprises can leave sensitive information on-premises or within private cloud instances in their preferred region yet still get the benefit of simple file collaboration across mobile devices, even with external parties.

› **Move to the cloud at their own pace, without changing EFSS providers.** Large enterprises are at varying stages of cloud adoption for enterprise applications and document storage. Top hybrid EFSS providers provide the flexibility to allow an organization to start with predominantly on-premises content storage and shift this to cloud over time. Several of the assessed hybrid providers can also offer entirely cloud solutions, including basic content repository services, that are comparable with the cloud EFSS providers.[5]

› **Serve their extended enterprises from existing content systems.** EFSS providers can fill a critical gap left by traditional content management and collaboration products: the ability to securely and simply share files with external participants. Corporate priorities are now focused on improving customer experience and digitizing business processes, which means that engaging

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critical outside stakeholders such as partners, suppliers, and customers with content is a key requirement.[6] EFSS providers offer the licensing models and a "no training required" experience to get external collaborators productive quickly and with minimal administrative efforts.

Enterprise File Sync And Share Evaluation Overview

To assess the state of the EFSS hybrid market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top vendors in the marketplace. After examining past research, user need assessments, customer surveys, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 37 criteria, which we grouped into three high-level buckets:

› **Current offering.** We assessed the technologies based on the breadth of the tool set, with particular emphasis on usability, ease of sharing with external participants, security, and flexibility in supporting customers not ready for a cloud-based EFSS solution. We surveyed customers to gain firsthand knowledge on the strength of particular capabilities and tested each vendor's mobile app with at least one large shared file.

› **Strategy.** EFSS hybrid vendors must show coherent strategies to help their customers share and manage content across a range of cloud and on-premises content applications, recognizing that enterprises are in various stages of cloud adoption. We assessed vendors on strategies for pricing models, APIs, and overall technology direction.

› **Market presence.** We evaluated each vendor based on its current customer base, the size of its EFSS revenue, and its geographic presence, partnerships, and vertical focus. We also considered the level of interest in the vendor based on the volume of inquiries from Forrester clients on the product.

Evaluated Vendors And Inclusion Criteria

Forrester included 10 vendors in the assessment: Accellion, Acronis, BlackBerry, Citrix, Egnyte, IBM, Microsoft, Syncplicity, Varonis, and VMware. Each of these vendors has a strong current EFSS offering and actively markets its tool as a standalone solution. We selected vendors based on the following criteria (see Figure 1):

› **A dedicated road map and go-to-market strategy focused on EFSS.** Each vendor demonstrated that hybrid or on-premises was the predominant model for delivery of its EFSS technology and that it was investing in these services.

› **Leadership in the EFSS market.** Selected vendors demonstrated the ability to shape the direction of the market through innovative delivery models, technology leadership, or their dominant market presence.

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› **A proven install base among enterprise customers.** Vendors demonstrated revenues of over $10 million with their EFSS hybrid product offerings or had a minimum of 350 paying enterprise customers.

FIGURE 1 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Version
Accellion	kiteworks	kw2016.01.00
Acronis	Acronis Access Advanced	7.2
BlackBerry	WatchDox by BlackBerry	
Citrix	ShareFile Enterprise	
Egnyte	Egnyte Adaptive Enterprise File Services	
IBM	IBM Connections Cloud IBM Connections	5.5
Microsoft	Office 365 OneDrive for Business SharePoint 2013	
Syncplicity	Syncplicity	
Varonis	DatAnywhere	
VMware	VMware AirWatch EMM VMware Airwatch Video VMware Content Locker VMware Socialcast	

Vendor inclusion criteria

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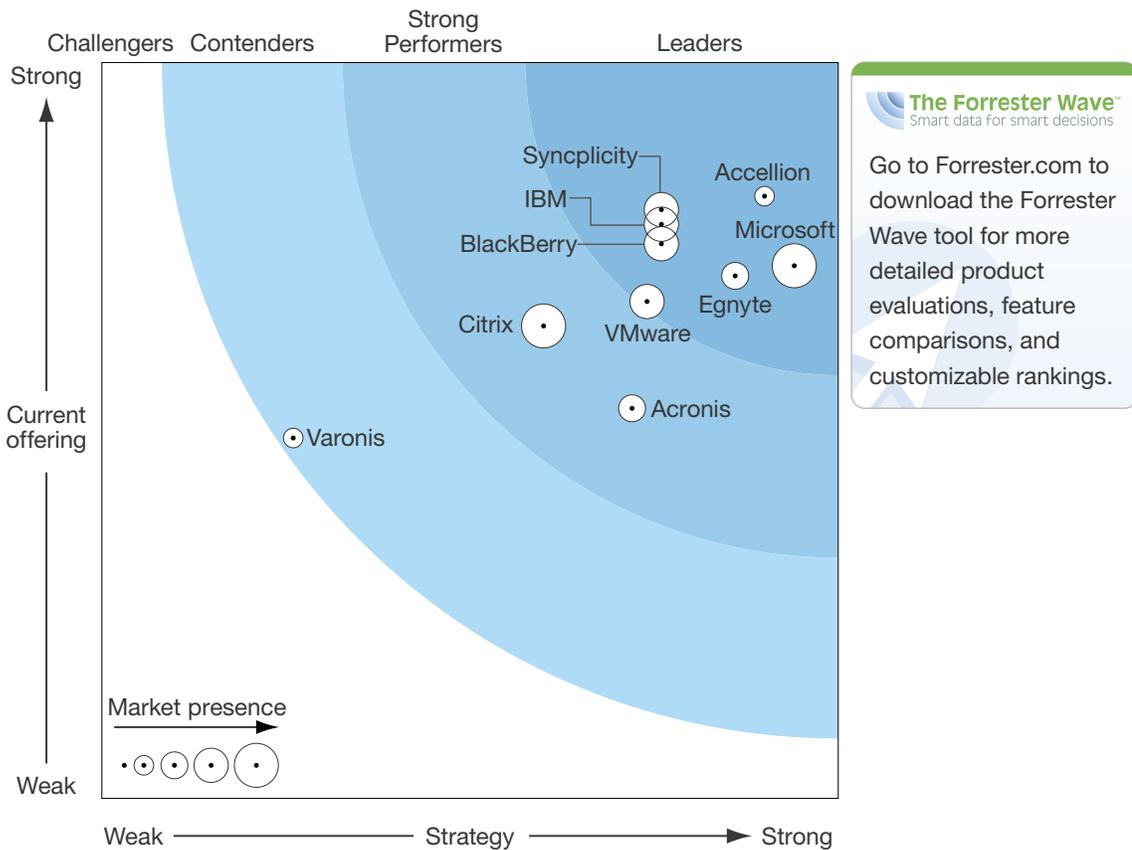
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Vendor Profiles

We intend this evaluation of the enterprise file sync and share hybrid solutions market to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 2).

FIGURE 2 Forrester Wave™: Enterprise File Sync And Share, Hybrid Solutions, Q2 '16

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FIGURE 2 Forrester Wave™: Enterprise File Sync And Share, Hybrid Solutions, Q2 '16 (Cont.)

	Forrester's Weighting	Accellion	Acronis	BlackBerry	Citrix	Egnyte	IBM	Microsoft	Syncplicity	Varonis	VMware
CURRENT OFFERING	50%	4.09	2.65	3.76	3.21	3.55	3.91	3.62	3.99	2.45	3.37
Architecture and repository services	35%	4.10	2.65	4.05	3.30	3.80	4.10	3.55	3.75	1.95	3.45
Collaboration and file sharing	25%	3.80	2.45	3.20	3.50	3.20	4.10	3.50	3.20	1.75	2.80
Security capabilities	20%	4.00	3.45	4.40	3.80	3.55	3.45	4.20	4.40	3.35	4.00
Usability	20%	4.50	2.10	3.30	2.10	3.55	3.80	3.30	5.00	3.30	3.30
STRATEGY	50%	4.50	3.60	3.80	3.00	4.30	3.80	4.70	3.80	1.30	3.70
Pricing strategy	15%	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00
Technology strategy	40%	5.00	5.00	5.00	3.00	5.00	5.00	5.00	5.00	1.00	3.00
Market traction	10%	3.00	1.00	3.00	3.00	1.00	3.00	5.00	3.00	1.00	3.00
API strategy	35%	5.00	3.00	3.00	3.00	5.00	3.00	5.00	3.00	1.00	5.00
MARKET PRESENCE	0%	2.00	2.51	3.17	4.33	2.68	3.84	5.00	3.01	1.67	4.00
Customers and markets	34%	2.00	3.00	3.00	4.00	4.00	4.50	5.00	4.00	2.00	3.50
Revenue	33%	2.50	2.50	3.00	4.00	2.00	4.00	5.00	3.00	2.00	4.50
Partners	33%	1.50	2.00	3.50	5.00	2.00	3.00	5.00	2.00	1.00	4.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Leaders

› **Accellion has a breadth of EFSS capabilities backed by high customer satisfaction.** Accellion, with its kiteworks EFSS product, offers flexible deployment models: on-premises, single-tenant cloud, or SaaS. The kiteworks solution offers a solid set of secure file editing and sharing, search, and content security capabilities. Integrations to a broad set of content stores, such as ECM systems, network drives, and even other cloud-based collaboration services, makes it attractive to businesses with a heterogeneous set of document-sharing requirements. Accellion continues to invest in its API strategy, and customers report a high level of satisfaction with its overall integration capabilities. Accellion supports retention and disposal policies as well as legal holds — important requirements in regulated industries. Customers also give high ratings for its usability, particularly for search, file sharing, and mobile.

› **Microsoft shows momentum with EFSS, using it to bridge on-premises and cloud.** Interest in Microsoft OneDrive for Business is growing as Microsoft ramps up its road map and invests development resources into making this a competitive EFSS offering. Customers using SharePoint 2013 on-premises can use the cloud edition of OneDrive for Business in a hybrid model, i.e., synchronizing files to allow easier remote access. Microsoft has invested in better cross-platform support, including native apps for Android and iOS to close the feature gap with Windows clients.

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This is a critical area of focus, as customers have reported relatively low levels of satisfaction with current mobile capabilities as well lack of ease when sharing files externally. Security and governance controls are also areas of investment, with data loss prevention (DLP) capabilities that can flag sensitive data or block sync on unmanaged desktop/laptops.

› **Egnyte provides flexible deployment options and differentiates with analytics.** Egnyte customers can choose to deploy this EFSS offering as a hybrid or in Egnyte cloud services. Egnyte uses public cloud services as well as local providers in regions such as Europe when data sovereignty requirements are present. Hybrid deployment allows businesses to use content in any existing common internet file system (CIFS)-compliant on-premises network drives or a range of content management systems such as SharePoint; ECM systems; cloud storage (such as Amazon Web Services [AWS], Azure, or Google Cloud Platform); or repositories (such as Google Drive). A content intelligence engine, launched in 2015, is an area of ongoing investment, revealing a range of usage patterns with compelling data visualization techniques. Customers report a relatively high level of satisfaction with overall file-sharing capabilities but low levels of satisfaction with file life-cycle management and handling items with sensitive content.

› **Syncplicity finds a balance between competing requirements for security and usability.** Newly independent (once again) after its spinoff from technology giant EMC in mid-2015, Syncplicity has focused on a growth strategy to play to its core strengths: usability and security. Syncplicity's customers validate investments in these areas, with particularly strong satisfaction levels for file-sharing capabilities, mobile support, and rights management. However, customers report a relatively low level of satisfaction with search capabilities. Deployment models are flexible, with customers offered SaaS, on-premises, or hybrid options. Connectors for existing content stores such as ECM systems (Documentum and SharePoint) are available. Syncplicity offers a hybrid deployment model that large enterprises find attractive, particularly for those organizations embarking on data center consolidation and choosing to migrate their storage to cloud services.

› **IBM includes broad collaboration capabilities with an eye to analytics.** IBM offers its Connections suite as both an on-premises and a cloud-based deployment model. The SaaS edition is a multitenant offering in IBM's SoftLayer cloud, which has data centers on three continents. When deployed on-premises, Connections provides the repository services for the collaborative content and files to be shared. Some connectors are available to leverage existing content stores, such as Box, IBM's ECM offerings, and SharePoint. File-sharing capabilities are enhanced with visual indicators to indicate what items are for internal versus external use. Social analytics mine usage patterns and recommend content. Customers reported relatively low levels of satisfaction with life-cycle management capabilities, file sharing, and professional services. External users can only access shared documents via the web user interface, with native mobile apps available only to licensed users, unlike most other evaluated products.

› **BlackBerry embraces secure file sharing with its software-centric renewal strategy.** BlackBerry's acquisition of WatchDox in 2015 launches it into the collaboration market as it evolves into a platform for secure business communication. WatchDox by BlackBerry shows particular

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strength in the security criteria for EFSS, with integrated rights management, watermarking for confidential items, and mobile protection. Flexible deployment options allow enterprises to adopt cloud (or not) at their own pace. WatchDox by BlackBerry is available as an on-premises appliance or in a public or private cloud instance. Connectors for key corporate content stores, such as file shares, SharePoint sites, or ECM systems, are available. Customers rate the overall file-sharing capabilities, as well as the company's professional services, highly. Customers report relatively lower satisfaction levels with the product's support for metadata, packaged integrations for line-of-business applications, and APIs/software development kits (SDKs) for custom integration.

> **VMware drives its secure, hybrid EFSS offering through a large global channel.** VMware's AirWatch product benefits from a channel of 75,000 resellers. Deployment options include the AirWatch content repository (on-premises or in cloud) or third-party cloud environments. VMware provides connectors for cloud services (such as Box, Google Drive, or Office 365) for on-premises content stores (such as SharePoint, network file servers, or ECM systems). VMware supports the CMIS standard to integrate to a broad set of content applications. Users have a wide range of file access options, including the secure Content Locker app for mobile use, as well as plug-ins for Outlook, web, and desktop sync. Extended collaboration capabilities are available in a premium bundle that includes Socialcast social networking capabilities. Customers report a relatively high level of satisfaction with AirWatch's overall capabilities, particularly for integration and interoperability, security, and life-cycle management. Training services were the only notable area in which customers did not report strong satisfaction.

Strong Performers

> **Acronis differentiates with a policy-driven approach to secure file sharing.** Acronis provides flexible deployment options. These include a multitenant cloud with the Acronis Files Cloud solution; an on-premises option that includes a content gateway service to connect to existing sources (such as file shares, ECM systems, and SharePoint sites); or a hybrid approach that is installed on-premises but works with cloud storage services. Acronis has 14 data centers globally, allowing a client with data sovereignty needs to specify a storage location. Such clients can alternatively work with a service provider to host data storage in a private cloud. A policy engine provides a broad set of options to control content-sharing capabilities, enable role-based content distribution, and manage mobile app configurations. Customers report a relatively high level of satisfaction with search, integration capabilities, and overall mobile user experience. However, customers report a relatively low level of satisfaction for professional services, especially for training.

> **Citrix extends its EFSS platform to meet the needs of key vertical markets.** Citrix has diversified its ShareFile offering — an early entrant into the cloud EFSS market — to address the demands of customers who need the flexibility of a hybrid approach. Citrix ShareFile supports Citrix-managed cloud storage, customer- managed on-premises storage, cloud services with AWS or Microsoft Azure, or a hybrid combination. Citrix provides connectors for network drives, SharePoint, and ECM systems. Citrix offers advanced collaboration via premium bundles that

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incorporate its Podio product for workflow, real-time feeds, comments, and discussions. Citrix has enhanced its vertical market focus, supporting needs of regulated industries, and has expanded support for DLP, secure deal rooms, and customer-owned encryption keys. When used in conjunction with Citrix's XenMobile mobile management offering, extended support is available for rights management and geofencing. Customers report high levels of satisfaction with file sharing among internal and external participants; however, they rated overall satisfaction relatively low.

Contenders

› **Varonis delivers the power of secure EFSS to an existing, on-premises infrastructure.** The Varonis DatAnywhere product will be a shortlist candidate for businesses that do not plan to move to cloud storage services in the foreseeable future. Regulated industries or those with stringent data protection or sovereignty requirements should assess the broader Varonis portfolio, which includes products to monitor security policies and restrict distribution of confidential data such as personally identifiable information (PII). DatAnywhere does not require users to move documents to any new content repository to take advantage of mobile-friendly file-sharing services. Administrative controls allow authorized users to determine which file shares (or any storage environment that that supports the CIFS protocol) can be shared, internally or externally. DatAnywhere lacks packaged integrations to other essential content stores, such as ECM systems or SharePoint sites. Customers rate Varonis' professional services favorably.

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Supplemental Material

Survey Methodology

Forrester's Global Business Technographics® Data And Analytics Survey, 2015 was conducted using an online survey fielded in January through March 2015 of 3,005 business and technology decision-makers located in Australia, Brazil, Canada, China, France, Germany, India, New Zealand, the UK, and the US from companies with 100 or more employees.

Forrester's Business Technographics provides demand-side insight into the priorities, investments, and customer journeys of business and technology decision-makers and the workforce across the globe. Forrester collects data insights from qualified respondents in 10 countries spanning the Americas, Europe, and Asia. Business Technographics uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

Online Resource

The online version of Figure 2 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of four data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by January 25th, 2016.

› **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria.

› **Executive briefings.** Once we analyzed the completed vendor surveys, we conducted calls where participants discussed the company's background, positioning, value proposition, customer base, and strategic vision.

› **Product demos.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.

› **Customer reference survey.** To validate product and vendor qualifications, Forrester also fielded an online survey with five of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

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After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to http://www.forrester.com/marketing/policies/forrester-wave-methodology.html.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with our Integrity Policy. For more information, go to http://www.forrester.com/marketing/policies/integrity-policy.html.

Endnotes

[1] To learn more about the top nine vendors in the enterprise file sync and share cloud solutions space, see the "The Forrester Wave™: Enterprise File Sync And Share Platforms, Cloud Solutions, Q1 2016" Forrester report.

[2] To understand the five themes shaping the global tech market in 2016 and 2017 as well as the market size for key software categories, see the "The Global Tech Market Outlook For 2016 To 2017" Forrester report.

[3] To learn more about the business content services segment of the ECM market, see the "The Forrester Wave™: ECM Business Content Services, Q3 2015" Forrester report.

[4] Source: Forrester's Global Business Technographics Data And Analytics Survey, 2015.

[5] To learn more about these cloud EFSS providers and learn which hybrid providers also have an entirely cloud option for their customers, see the "The Forrester Wave™: Enterprise File Sync And Share Platforms, Cloud Solutions, Q1 2016" Forrester report.

[6] To learn more about the importance of securely serving external stakeholders with corporate content, see the "ECM In 2020: The Extended Enterprise Means A New Vision For Enterprise Content Management" Forrester report.

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