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

The Nine Providers That Matter Most And How They Stack Up

by Cheryl McKinnon
March 10, 2016

Why Read This Report

In our 40-criteria evaluation of enterprise file sync and share (EFSS) cloud providers, we identified the nine most significant ones — Box, Dropbox, Google, Huddle, IBM, Intralinks, Microsoft, Thru, and Workshare — 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 cloud services for file sharing and storage is the preferred approach.

Key Takeaways

Box, Google, Microsoft, And Dropbox Lead The Pack
Forrester's research uncovered a market in which Box, Google, Microsoft, Dropbox, IBM, and Intralinks lead the overall pack. Thru, Huddle, and Workshare offer competitive options, particularly for vertical or application-specific use cases.

EA Pros Must Balance User Experience With Security Requirements
The enterprise file sync and share cloud services market continues to grow. More EA professionals see EFSS as a way to address top challenges as they digitize business processes, look for better ways to share documents, and seek to serve collaborators outside of their enterprises. Secure file sharing is essential to serve customers, engage with suppliers, and be productive with partners.

Top SaaS EFSS Vendors Act As Both Systems Of Engagement And Systems Of Record
As on-premises, hard-to-use collaboration and content management tools struggle to achieve user adoption, newer approaches that focus on usability, security, and basic content repository services are succeeding. Vendors that can successfully deliver simple life-cycle management, rights management, and library services to their customers are well positioned to become the next generation of cloud-based systems of record.

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Notes & Resources

Forrester conducted product evaluations in December 2015, interviewed nine vendors, and surveyed their customer references. Vendors include Box, Dropbox, Google, Huddle, IBM, Intralinks, Microsoft, Thru, and Workshare.

Related Research Documents

ECM In 2020: The Extended Enterprise Means A New Vision For Enterprise Content Management

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

Vendor Landscape: Document-Centric Collaboration, Q4 2015

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Enterprise File Sync And Share Is A Market On The Cusp Of Transition

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: first, products that are native cloud-based software-as-a-service (SaaS) offerings, and second, products that target hybrid cloud or on-premises deployments. Cloud-native EFSS providers are investing in capabilities that make them contenders for tomorrow's systems of record for corporate content. EFSS solutions addressing the hybrid and/or on-premises use cases focus on delivering secure connectors to existing content applications or storage locations. Thus, they allow enterprises to gain the benefits of mobile-friendly, secure file sharing technology without the burden of migrating content to yet another repository.[1] EA pros, when assessing EFSS requirements, must take this content repository question into account.

Content Is Shifting To The Cloud, And EFSS Providers Are Playing An Essential Role

EFSS cloud vendors have the opportunity to serve not only as collaborative systems of engagement across teams and companies but also as primary systems of record. Enterprises are accelerating their moves to cloud for content management and collaboration requirements. This means:

› **EFSS cloud offerings already compete with ECM providers.** Enterprise content management (ECM) 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] Overall, EFSS cloud vendors are ahead of these vendors in crafting the next generation of true software-as-a-service (SaaS) content management and collaboration services.[3]

› **By 2018, 80% of enterprises plan to use SaaS for some or all content services.** Forrester's data shows that a high proportion of firms plan to meet all or some of their enterprise content management requirements with SaaS over the next two years.[4] As the leading EFSS cloud providers enhance key capabilities such as highly scalable repository services, metadata, search, task or workflow management, simple retention rules, and auditing, EFSS cloud providers can address a chunk of this market.

› **The EFSS hybrid solution providers are also important to assess.** Other key vendors in the broad EFSS market offer a mix of hybrid, cloud, and on-premises deployment options. While categorized as hybrid providers in Forrester's market segmentation, products such as Citrix ShareFile, Egnyte, and Syncplicity also offer complete cloud solutions for application delivery, content, and metadata management, in addition to hybrid options. These alternate products offer compelling approaches for firms still transitioning to cloud services for content storage or management.

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Usability Is The Ultimate Competitive Advantage For EFSS Providers

Successful EFSS deployments are driven primarily by how users embrace the tool. The leading EFSS providers in this evaluation benefit from their multitenant, SaaS deployment models. Vendors are able to glean insights into how users engage with the applications and use that data to drive their road maps and user interface evolution. This means:

› **Customers must view ease-of-use and fit for the mobile workforce as key criteria.** A common theme in both the customer reference survey for this evaluation and client inquiry calls with Forrester is that enterprise buyers focus on usability as a top consideration during vendor selection. Steering busy information workers to a corporately sanctioned offering rather than to self-provision or freemium editions is successful only when the approved tool meets or exceeds the usability standards of other alternatives.

› **Vendors with high customer satisfaction levels are likely to be chosen again.** Even when EFSS solutions have feature gaps in areas such as advanced security or life-cycle management, the customers we surveyed were very likely to reselect their existing solution providers if they viewed overall usability positively.[5]

› **A low barrier of adoption is key to serve the extended enterprise.** EFSS providers have filled a critical gap left by traditional content management and collaboration products: the ability to securely and simply share files with external participants. Corporate priorities now focus on improving customer experience and digitizing business processes, meaning that engaging critical outside stakeholders such as partners, suppliers, and customers with content is a key concern. 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 cloud 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 40 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, security, and support for basic content repository services. We surveyed customers to get firsthand observation on the strength of particular capabilities and tested each vendor's mobile app with at least one large shared file.

› **Strategy.** EFSS cloud vendors must show coherent strategies to help their customers share and manage content in the cloud. We assessed vendors on strategies for pricing models, APIs, and overall technology direction.

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› **Market presence.** We evaluated each vendor based on its current customer base, size of its EFSS cloud revenue, geographic presence, 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.

Vendors Are Committed To Cloud, Have A Strong Install Base, And Shape The Marketplace

Forrester included nine vendors in the assessment: Box, Dropbox, Google, Huddle, IBM, Intralinks, Microsoft, Thru, and Workshare. Each of these vendors has a strong current EFSS cloud 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 SaaS EFSS.** Each vendor demonstrated that cloud was the predominant model for delivery of its EFSS technology and that it was investing in cloud-based content repository services.

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

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

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FIGURE 1 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated
Box	Box
Dropbox	Dropbox Business
Google	Google Drive
Huddle	Huddle
IBM	IBM Connection Files
Intralinks	Via
Microsoft	OneDrive for Business
Thru	Thru
Workshare	Workshare

Vendor selection criteria

A dedicated road map and go-to-market strategy focused on SaaS EFSS. Each vendor demonstrated that cloud was the predominant model for delivery of its enterprise file sync and share (EFSS) technology and that it was investing in cloud-based content repository services.

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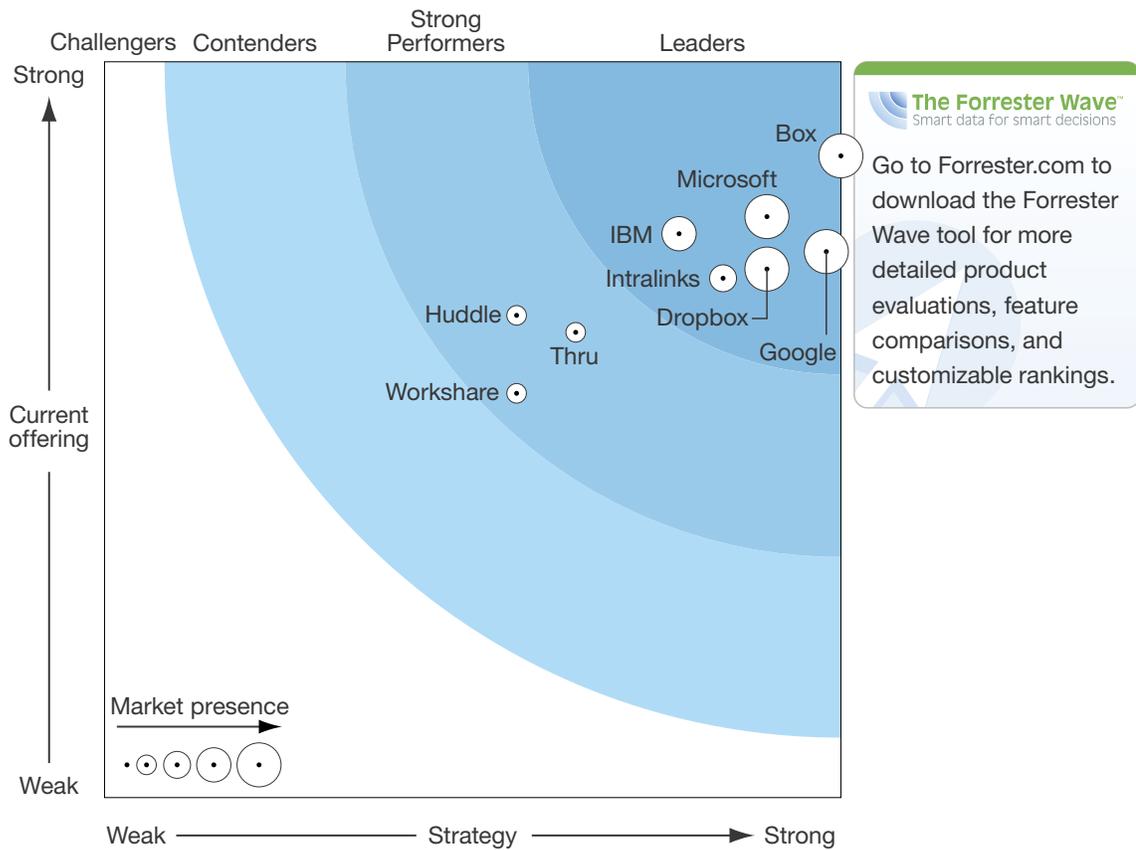
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Vendor Profiles

This evaluation of the enterprise file sync and share cloud solutions market is intended 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, Cloud Solutions, Q1 '16

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FIGURE 2 Forrester Wave™: Enterprise File Sync And Share, Cloud Solutions, Q1 '16 (Cont.)

	Forrester's Weighting	Box	Dropbox	Google	Huddle	IBM	Intralinks	Microsoft	Thru	Workshare
CURRENT OFFERING	50%	4.33	3.59	3.71	3.28	3.83	3.53	3.94	3.16	2.75
Architecture and repository services	35%	4.15	4.00	4.25	2.65	3.90	3.00	4.15	3.30	2.20
Collaboration and file sharing	25%	4.30	3.60	3.60	3.50	4.30	3.90	4.30	3.40	2.70
Security capabilities	20%	4.00	2.15	3.20	3.50	3.35	4.30	3.65	2.75	3.10
Usability	20%	5.00	4.30	3.40	3.90	3.60	3.20	3.40	3.00	3.40
STRATEGY	50%	5.00	4.50	4.90	2.80	3.90	4.20	4.50	3.20	2.80
Pricing strategy	20%	5.00	3.00	5.00	3.00	3.00	3.00	3.00	5.00	3.00
Technology strategy	45%	5.00	5.00	5.00	3.00	5.00	5.00	5.00	3.00	3.00
Market traction	10%	5.00	4.00	4.00	1.00	3.00	1.00	4.00	1.00	1.00
API strategy	25%	5.00	5.00	5.00	3.00	3.00	5.00	5.00	3.00	3.00
MARKET PRESENCE	0%	4.33	4.17	5.00	2.00	3.50	2.17	5.00	1.83	1.50
Customers and markets	33%	4.50	4.00	5.00	3.00	3.50	2.50	5.00	3.00	2.00
Revenue	33%	4.00	3.50	5.00	1.50	4.00	3.00	5.00	1.50	1.50
Partners	33%	4.50	5.00	5.00	1.50	3.00	1.00	5.00	1.00	1.00

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

Leaders

› **Box continues to push the boundaries of the EFSS market.** Box, best known for its flagship enterprise file sync and share offering, has invested in its underlying content repository services. A strong focus on APIs makes this platform attractive to developers and architects who need to solve the content-centric challenges of enterprises. Independent software vendors are also attracted to the Box platform, using it as their cloud-based content repository service. Box is committed to usability, mobility, and customer success. Enhanced capabilities for basic life-cycle management, legal hold, metadata, and task management position Box as a credible short-list candidate for some ECM use cases, particularly for the management of collaborative business content. Key partners, such as IBM, deliver Box's content collaboration and management services to large enterprise customers, with joint integrations to eDiscovery, case management, and multichannel capture applications, filling some of the governance gaps in the Box offering.

› **Google offers solid EFSS services, especially for very large file use cases.** Google Drive delivers high-performing file sharing and storage services, even for very large formats, such as video, that cross into the hundreds of gigabytes. Most other EFSS providers have file-size limits that could impede advanced requirements. Customers report high levels of satisfaction with mobile use, full-text search, and overall technology innovation strategy. Uploaded image formats are automatically processed with optical character recognition (OCR), enabling search. Collaboration

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and content co-creation capabilities are strong, particularly when used in the context of Google Apps for Work. Google is actively filling capability gaps in areas of life-cycle management and support for information governance requirements. In early 2016, expect to see enhanced data loss prevention (DLP) — this allows administrators to block actions on content containing sensitive data, such as credit card strings or other personally identifiable information — and eDiscovery, with support for legal holds on documents.

› **Microsoft shows strong momentum in the EFSS market.** Interest in Microsoft OneDrive for Business is growing as Microsoft ramps up its road map and invests development resources into making this a competitive SaaS EFSS offering. Microsoft's cloud-first strategy with Office 365 means that OneDrive for Business will continue to have an aggressive road map into 2016. Microsoft has invested in better cross-platform support, including native apps for Android and iOS, to close the feature gap with Windows clients. This is a critical area of focus, as customers have reported relatively low levels of satisfaction with current mobile capabilities. Microsoft continues to invest in global data centers to meet requirements for data sovereignty, including new data centers in Australia, Germany, and India. Security and governance controls are also areas of investment, with DLP capabilities that can flag sensitive data or block sync on unmanaged desktop/laptops.

› **Dropbox has a high-performance solution to the "Dropbox problem."** Dropbox has moved quickly to enhance its key enterprise offering, Dropbox Business, with API capabilities, native integrations with key providers such as Adobe and Microsoft, and partnerships with security and eDiscovery providers, including Hewlett Packard Enterprise (HPE). A recently launched enterprise customer success program targets its large premium accounts. Dropbox's cloud services support the speed and scale requirements of enterprises that collaborate widely on a range of file types between internal and external participants. Dropbox has enhanced its real-time, multiuser collaboration capabilities. These include Dropbox Paper (for content authoring) and activity notifications through an indicator called Dropbox badge. Enterprise customers report a high level of satisfaction with Dropbox, particularly in areas such as mobility and ease of learning. Governance of sensitive content remains an area of relative weakness for Dropbox, including lack of native life-cycle management capabilities.

› **IBM includes broad collaboration capabilities with an eye to analytics.** IBM Connections offers tiers of services, from simple file sharing to broader enterprise social offerings that include document authoring and email tools. 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. IBM Connections is deployed as a multitenant SaaS offering in IBM's SoftLayer cloud, which has data centers on three continents. Enterprises with data sovereignty requirements can select a particular region for content storage. Customers have reported relatively low levels of satisfaction, particularly with professional services and mobile usability. External users can access shared documents only via the web user interface, with native mobile apps available only to licensed users, unlike other evaluated products.

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› **Intralinks differentiates with strong governance and rights management.** Intralinks launched Via to provide secure file sharing and content collaboration capabilities, particularly in regulated industries and for cross-enterprise teams working with high value or sensitive content. Intralinks offers EFSS platform services from UK and US data centers, with several new data centers planned for 2016 to meet growing data sovereignty requirements. Intralinks Via provides comparatively rich metadata, workflow, and life-cycle management capabilities. Plug-in free information rights management (IRM) is an important differentiator. Customers may use granular controls on files that are shared, even with external collaborators. For example, Intralinks can allow users to prevent collaborators in an outside agency from copying or printing the file and can allow users revoke access to the file at any time, even after downloading. Users can also watermark files with security markings such as "confidential" or with user identifications and time stamps to discourage unauthorized reproduction. Customers rate content life-cycle management capabilities highly but rate partner and vertical strategies poorly.

Strong Performers

› **Thru has scale to support large volumes and file sizes, with a healthy OEM business.** Thru provides a SaaS content repository service as part of its EFSS offering and offers a rich set of APIs to integrate to major line-of-business (LOB) applications, such as Salesforce. Integration to email systems is an area of differentiation, allowing users to send links to secure, shared files via familiar IBM Notes or Outlook interfaces. Thru provides broad search capabilities, including metadata and full text, and can federate search into other integrated applications. Data migration tools can enable analysis and categorization of metadata as part of the ingestion process. Customers with data sovereignty requirements can select and control regional data centers and enforce geofencing by whitelisting/blacklisting IP addresses from specific countries. Professional services, APIs, and office application integrations are rated highly by customers.

› **Huddle has clear focus on its core markets, offering strong collaboration capabilities.** Huddle has solid traction in public sector markets, especially in the UK, and is growing in knowledge-intensive markets such as auditors, consultancies, and accounting firms. Core use cases include sharing and cocreation of confidential content such as bids, proposals, audit reports, and client project deliverables, often with external parties. Customers report high levels of satisfaction, particularly for overall content repository services, life-cycle management, and mobile usability. Huddle has data centers in the US and throughout the European Union and can support the data sovereignty requirements of public sector organizations or enterprises subject to data protection laws. Companies can specify the data center location in which they store documents and metadata. Huddle has also introduced intelligence into its file sync capabilities, with desktop and iOS users able to have system-recommended files automatically synched, based on usage patterns with similar documents.

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› **Workshare differentiates with secure file sharing, including metadata detection.** Workshare has a strong heritage serving the confidentiality requirements of law firms and corporate and government legal departments. For regulated industries, a key area of differentiation is Workshare's ability to scan shared files for comments, tracked changes, or other sensitive metadata before distribution to external parties, and customers rate encryption capabilities highly. Workshare's SaaS content repository can serve as a system of record but more often integrates to ECM systems, including iManage, Microsoft SharePoint, or OpenText eDOCS. The EFSS offering is multitenant, and customers can select from data centers in several regions if data sovereignty requirements exist or, in a hybrid deployment, can store content in their own data center. Core collaboration capabilities include annotations, mark-ups, and support for real-time sync of such comments across devices.

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Supplemental Material

Survey Methodology

Forrester's Business Technographics® Global Software Survey, 2015, was fielded to 3,651 business and technology decision-makers located in Australia, Brazil, Canada, China, France, Germany, India, New Zealand, the UK and US from companies with two or more employees. This survey is part of Forrester's Business Technographics and was fielded from July 2015 to August 2015. ResearchNow fielded this survey on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates. We have provided exact sample sizes in this report on a question-by-question basis.

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 December 31, 2015.

› **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.

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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.

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] In parallel with this research, Forrester is conducting an evaluation of important enterprise file sync and share hybrid solution vendors. This report should be available mid-Q2 2016.

[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] In Forrester's 31-criteria evaluation of enterprise content management (ECM) business content services vendors, we identified the 11 most significant software providers — Alfresco Software, Box, EMC, Everteam, IBM, iManage, Lexmark International, M-Files, Microsoft, OpenText, and SpringCM — in the category and researched, analyzed, and scored them. To learn more about these vendors and how they fared against our criteria, see the "The Forrester Wave™: ECM Business Content Services, Q3 2015" Forrester report.

[4] When asked about their firm's plans to use software-as-a-service to complement or replace ECM applications, only 15% of global software technology decision-makers reported no plans. More than a quarter of them (27%) responded that they planned to replace most/all with SaaS within two years. Eighteen percent are close to completing or have completed the transition. Source: Forrester's Global Business Technographics Software Survey, 2015.

[5] As part of the vendor evaluation process, Forrester fielded an online survey to customer references provided by the vendors. We asked respondents about their satisfaction levels with a range of product capabilities and professional services offerings. We incorporated this feedback into the evaluation's criteria scales.

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