

For: CIOs

The Forrester Wave™: File Sync And Share Platforms, Q3 2013

by Ted Schadler and Rob Koplowitz, July 10, 2013

KEY TAKEAWAYS

Consumerization Has Made File Sync And Share A Must-Have Capability

The explosive proliferation of powerful mobile devices has led to employee demand for solutions that will allow seamless access to enterprise content from any device. Solutions like Dropbox, originally developed for consumer usage, have barged into the enterprise, forcing IT to reconsider how to balance its portfolio against consumer demands.

File Sync And Share Is More Than Syncing And Sharing: It's Document Collaboration

File sync and share is borne of two requirements: the need to sync files on all devices and share files with colleagues and partners. These two capabilities cover scenarios ranging from email attachment replacement to file system replacement, from casual partner collaboration to compliant workflow in regulated industries.

A Maturing Market Will See Traditional Vendors Flex Their Muscles

Traditional content and collaboration vendors have responded to the demand for file sync and share with solutions of their own. Playing the usual role of fast followers, they will extend existing document-centric assets and customer relationships to keep the startups at bay while they build out their offerings in earnest.

File Sync And Share Is, However, An Entry Point For Potential Market Disruption

The solution to what vendors have taken to calling the “Dropbox problem” may come from Dropbox itself or from fellow born-in-the-cloud competitor Box. The twin disruptors of cloud and mobile have given similar new entrants an opportunity to create dominant market positions not only in sync and share but also in content collaboration and management.

The Forrester Wave™: File Sync And Share Platforms, Q3 2013

The 16 Providers That Matter Most And How They Stack Up

by [Ted Schadler](#) and [Rob Koplowitz](#)
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WHY READ THIS REPORT

In Forrester's 26-criteria evaluation of file sync and share vendors, we identified, researched, analyzed, and scored products from the 16 most significant solution providers in this market: Accellion, Acronis, AirWatch, Alfresco, Box, Citrix, Dropbox, Egnyte, EMC, Google, Hightail (formerly YouSendIt), IBM, Microsoft, Novell, Salesforce.com, and WatchDox. We scored factors like mobile support, security, links to systems of record, organizational commitment, market experience, and deployment architecture to give you the decision tools to create the right shortlist for your particular environment and scenarios. This report and accompanying spreadsheet detail our findings about how well each vendor scores based on our criteria and where they stand in relation to each other.

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Notes & Resources

Forrester conducted product evaluations in March 2013 and interviewed 30 vendor and user companies. We evaluated solutions from the following vendors: Accellion, Acronis, AirWatch, Alfresco, Box, Citrix, Dropbox, Egnyte, EMC, Google, Hightail, IBM, Microsoft, Novell, Salesforce.com, and WatchDox.

Related Research Documents

[Document Collaboration Vendor Landscape](#)
May 30, 2013



FILE SYNC AND SHARE IS AN ANCHOR FEATURE OF DOCUMENT COLLABORATION

Employees have figured out that synchronizing their files across multiple devices and sharing files with employees and customers or partners outside the corporate firewall have collided in a single solution that we call (for now, anyway) file sync and share. Forrester recognizes that file sync and share is an important foundational capability to help solve the “document collaboration” challenge.¹ Now IT is getting onboard and is in the hunt for business-ready solutions from vendors as diverse as AirWatch, Box, Dropbox, Egnyte, Hightail, and IBM that can address two major challenges:

- **Keeping files synchronized across multiple personal and enterprise devices.** With consumerization driving employees to bring personal smartphones and tablets to work, employees’ need to synchronize files grew from a whisper to a scream over the past few years. Twenty-one percent of global information workers use file sync solutions.² The scream will grow louder as the number of tablets will triple to 905 million by 2017 to join the billions of computers and smartphones used for work.³
- **Sharing large files with colleagues, partners, and customers.** The document collaboration scenarios continue to expand. Today, 59% of global information workers spend 15 minutes or more per day working with partners or suppliers, and another 57% spend similar amounts of time working with customers.⁴ Also augmenting these scenarios is the growing number of employees working with highly distributed teams: A third of North American and European information workers are on teams with members in different locations.⁵

RESOLVE THREE DILEMMAS TO MAKE SMART FILE SYNC AND SHARE CHOICES

Your file sync and share solution will have to accommodate an astounding breadth of document collaboration scenarios, each of which requires a different combination of factors. For example, you might need to accommodate a board book or M&A process for a few dozen employees and also email attachment replacement for all employees. Some scenarios might require structured workflow while others are more ad hoc collaborations. As if this breadth-of-scenarios problem weren’t hard enough to solve, you must also make some tough tradeoff decisions on architecture, platforms, and cost in order to pick a business-grade file sync and share solution that serves your needs now and in the future:

1. Architecture: cloud or on-premises, your storage or theirs, security or workforce experience?
2. Platform: agile pure play or strategic supplier?
3. Price: lower cost or higher functionality?

Architecture: Cloud Or On-Premises? Your Storage Or Theirs? Security Or Experience?

Forrester believes that the technology to support document collaboration is undergoing a seismic shift from simple to complex, from desktop to mobile, and from employees to partners. Traditional inside-the-firewall platforms handled desktops and simple teamwork. But the future platform for document collaboration must accommodate the complex requirements of mobile employees and partner collaboration. File sync and share solutions are at the center of this shift because employees have figured out that they can solve the problem themselves with a cloud provider like Dropbox or SugarSync. Before CIOs can lead their teams to make the best product choice for the short term and for the long term, they will have to get agreement on these architecture questions:

- **Can you store files in and access them from the cloud?** Cloud-hosted solutions are better at handling the needs of a mobile workforce and sharing documents outside the firewall. Most content and most content management systems are hosted on-premises today, and many firms, particularly in regulated industries, would like to keep all documents behind the firewall. We evaluated vendors in the Forrester file sync and share Wave with cloud, on-premises, and “hybrid” solutions.
- **Should you store files in the vendor’s repository or your own storage system?** This decision doesn’t matter much when we’re talking about a terabyte of storage. But when your file sync and share scenarios encompass petabytes of storage, then storage physics and economics matter a lot. The right answer may be to host new content in the cloud yet provide sync and share access to your content systems of record. The vendors in this Forrester Wave cover a full range of storage options.
- **What’s the right tradeoff between content security and workforce experience?** More security means more IT controls, and controls always interfere with workforce experience. You will have to decide where on this teeter-totter to sit: more security at the expense of user hassle, or more simplicity at the expense of fewer controls? The decision you make may run afoul of empowered employees and business managers who might continue using a more convenient solution at the expense of IT control and content compliance. We evaluate security and workforce experience via app store ratings in this Forrester Wave.

Platform: Agile Pure Play Or Strategic Supplier?

Many Forrester clients ask us if they should select a stopgap file sync and share solution and wait until the market matures for a long-term solution. This is a tough question to answer because three market dynamics will play out over the next two to three years: 1) Smaller pure-play vendors will be driven out of the market, get acquired, or specialize; 2) large traditional vendors that are behind today will catch up and aggressively drive down price points; and 3) one or two upstarts could disrupt the document collaboration market and take strong market positions. Both pure plays and strategic suppliers have places in this early market:

- **Pure-play vendors lead in functional capabilities.** While the file sync and share market is young and rapidly changing, some offerings have been out for five years or more. Not surprising, those that have been in the market longer have established strong early market positions. Vendors like Acronis, Box, Egnyte, and WatchDox have mature offerings with strong security capabilities. Accellion and Hightail bundle sync with their mature external content-sharing solutions. These vendors contend in an increasingly competitive market with larger and sometimes better-funded adversaries. The goal of each pure play is to stay highly innovative and build differentiated products to stay relevant, or look to exploit specific vertical or horizontal business opportunities.
- **Most of the old guard is playing catch-up.** Established vendors like Google, IBM, Microsoft, Novell, and Salesforce.com have recognized the value of file sync and share as a natural add-on to their offerings, as well as a critical mobile competency, and moved to include this capability. Not surprisingly, they trail some of the early market entrants in terms of functionality and are playing catch-up. For example, Citrix and EMC have fast-tracked their market positions by acquiring established offerings ShareFile and Syncplicity, respectively. However, their role as key vendors of collaboration and content capabilities that complement file sync and share and their ability to execute in the long term make them worthy of consideration for their existing customers.

Price: Lower Cost Or Higher Functionality?

Cost is a key consideration for firms that need to roll out file sync and share to every employee. Yet prices and pricing models vary widely. For example, the consumer version of Dropbox is free for 5 gigabytes of storage. Google bundles Drive into its \$50 per user per year Google Apps portfolio with 30 gigabytes of total storage. IBM and Microsoft also bundle their solutions into their cloud and on-premises products: Connections and SharePoint, respectively.

Some of the pure-play vendors price their solutions at \$5 per user per month; some at more like \$80 per user per month (albeit with advanced functionality).⁶ Cost is clearly a barrier to deploying file sync and share to every employee as part of the collaboration toolkit. Figuring out what the long-term costs of file sync and share really are is made more difficult as four factors drive the long-term cost equation:

1. **Bundled services look free, but marginal costs are hidden.** Google Drive, for example, appears to be free, but a proper assessment of value would assign a cost of something like \$1 per user per month to it. And of course it's always possible that the vendors will start pricing bundled services separately as the market matures.
2. **Cloud services look simple, but expanded scenarios will add cost.** Dropbox for Business starts at about \$11 per user per month (for 100 people) with unlimited cloud storage.⁷ To handle more security, you will need to extend this baseline with a solution like nCrypted Cloud for an additional cost.

3. **Pure plays maintain their pricing but add functionality to justify it.** Where does file sync and share leave off and a higher value workflow or content management solution kick in? The lines will blur as vendors seek to push customers to higher value and higher cost services.
4. **Bring-your-own-storage solutions look cheaper but also shift cost to another budget.** AirWatch, Citrix, Egnyte, and EMC are just some of the vendors that let customers use their own storage. Bring-your-own storage lets these vendors price the file sync and share features without worrying about the cost of storage. When it comes to pricing out the service for the next five years, be sure to factor in all the costs: yours and theirs.

EVALUATION CRITERIA: CURRENT OFFERING, STRATEGY, AND MARKET PRESENCE

To assess the state of the file sync and share market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 26 criteria, which we grouped into three high-level buckets:

- **Current offering.** To assess product strength, we evaluated current functionality in numerous areas like device support, integration with existing prominent content technology offerings, security, deployment alternatives, and administrative capabilities.
- **Strategy.** We reviewed each vendor's strategy, evaluating its focus on mobility, collaboration, APIs, partners, and global presence as well as how the vendor's planned enhancements will position it for market leadership and whether or not the vendor has the team, vision, and architecture to support that strategy.
- **Market presence.** To determine a vendor's market presence, we evaluated each vendor's installed base as well as its overall revenue and the number of engineers and sales staff focused on the product.

We Evaluated 16 File Sync And Share Vendors

When selecting vendors for this evaluation in December 2012, we focused on those that had significant momentum, were making strategic commitments to the market, and were most common on enterprise shortlists. Forrester included 16 vendors in the assessment: Accellion, Acronis, AirWatch, Alfresco, Box, Citrix, Dropbox, Egnyte, EMC, Google, Hightail, IBM, Microsoft, Novell, Salesforce.com, and WatchDox. Each of these vendors has (see Figure 1):

- **A competitive file sync and share product available in 2013.** Each of the offerings evaluated is shipping or will be available in market in 2013. These offerings handle the two primary workloads: managed file synchronization among multiple devices and the ability to share that content with colleagues and people outside of the firm.

- **The ability to serve the needs of Forrester’s enterprise clients.** Each offering has the ability to serve the needs of some portion of Forrester’s enterprise users with regard to security, device support, and administrative control. Not all vendors cover all requirements, but collectively they cover most of the scenarios required by Forrester’s clients.
- **Been on a shortlist of a Forrester client.** In order to keep the Forrester Wave at a manageable number of vendors, Forrester queried our inquiry database and solicited feedback from several analyst experts to help determine which vendors are most highly relevant to Forrester clients.

Figure 1 Evaluated Vendors: Vendor Information And Selection Criteria

Vendor	Product evaluated	Product version evaluated	Version release date
Accellion	Accellion Mobile File Sharing Solution	9.3.9	2012
Acronis	activEcho	2.7.0	Feb. 2013
AirWatch	Secure Content Locker	1.5	Feb. 2013
Alfresco	Alfresco in the cloud	Not versioned	June 2012
Box	Box Enterprise Edition	Not versioned	N/A
Citrix	ShareFile	Not versioned	N/A
Dropbox	Dropbox for Business	Not versioned	N/A
Egnyte	Enterprise/Office Local Cloud	8.1	Feb. 1, 2013
EMC	Syncplicity Business/Enterprise Edition	Not versioned	N/A
Google	Drive	Not versioned	N/A
Hightail	Hightail for Enterprise	Not versioned	March 2012
IBM	IBM Connections/SmartCloud Connections	Not versioned	N/A
Microsoft	SkyDrive Pro	SharePoint 2013	N/A
Novell	Filr	Beta	April 2013
Salesforce.com	Chatterbox	Beta	N/A
WatchDox		3.5	Jan. 21, 2013

Vendor selection criteria

The vendor has or will have a competitive file sync and share product available in 2013.

The vendor’s product has the ability to serve the needs of Forrester’s enterprise clients.

The vendor has been on a shortlist of a Forrester client.

Source: Forrester Research, Inc.

Some Vendors Were Not Included In The Detailed Evaluation

Despite these selection factors, we were not able to include every vendor that could be right for your organization. The reason is simple: Too many vendors are vying for too few customers. We had to choose based on the most visible and viable vendors at the time we launched the process. But this market is evolving so rapidly that new vendors make claims on it every day. As many as 30 or 40 vendors offer file sync and share capabilities as part of their application or document collaboration or mobile management solution. While we cannot name them all, we list here some of the most relevant vendors that didn't make it into the evaluation:

- **BoardVantage.** This software-as-a-service (SaaS) provider came into being more than six years ago to address the secure document sharing that boards of directors and executive teams need. When iPad exploded on the scene, BoardVantage's business skyrocketed. It's now expanding its footprint into more horizontal scenarios to support all employees.
- **Good Technology.** Good Technology, a mobile device and application management vendor, acquired a highly secure file sync and share solution in 2012 from Copiun. Customers using Good Technology's device and application management solution can now also use the new file sync solution.
- **Intralinks.** This vendor began life providing virtual deal rooms — hosted collaboration workspaces to, for example, help mergers and acquisitions teams share documents securely among multiple parties. It has since introduced Via, a file sync and share solution that addresses a broader array of employees and scenarios.
- **Workshare.** During the course of this evaluation, Forrester has seen an increase in demand for Workshare's sync and share solution among our client base. The Workshare functional value is largely focused on sync and share. With broad mobile device support, Workshare offers an elegant, secure, policy-driven solution to organizations with the most rigorous security requirements. Workshare offers granular policy settings for security professionals and in-line commenting capabilities for mobile users.

THREE VENDORS EARN LEADER STATUS, BUT ONE LEADS BY HALF A LENGTH

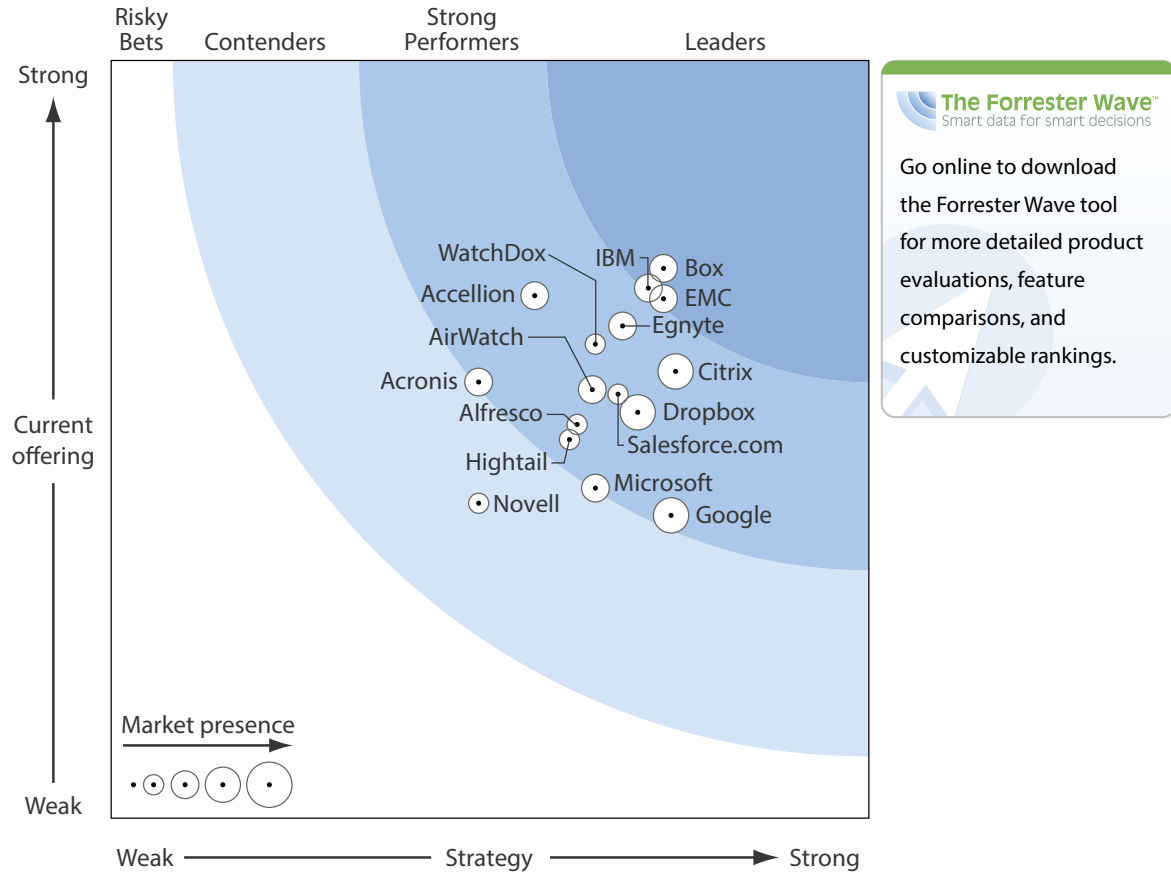
This is a very early market, and nobody covers all the bases when it comes to products, deployment flexibility, security, integration, partnerships, or global presence. Instead, vendors partition along architectural, portfolio, and strategic lines (see Figure 2):

- **Box has a half-length lead on the others.** Box comes out a little ahead because it covers more ground than the other solutions in both its current offering and strategic choices.

- **EMC and IBM inch into Leader positions.** These two vendors have strong offerings and a solid strategy for success, but each misses on a key capability, either in the current offering or strategy.
- **Acellion, Citrix, Egnyte, and WatchDox head a crowded field of Strong Performers.** These vendors are missing on some key aspect of a leadership product but have solid offerings.
- **AirWatch, Alfresco, Dropbox, and Salesforce.com are in the middle of Strong Performers.** These vendors, too, have solid offerings, though they are missing a bit more on either current offering or strategy.
- **Acronis, Google, Hightail, and Microsoft round out the Strong Performer category.** These vendors earn the Strong Performer label but are missing key elements, either in their strategy or current offering.
- **Novell, even at this early stage, has established itself as a Contender.** This product was in beta when we evaluated it and is only just now coming into general availability with an aggressive product development road map unfolding over the next 24 months.

This published evaluation of the file sync and share market is a starting point only. Your needs will vary, so to get the most value from this assessment, please view the detailed product evaluations. Then use the Forrester Wave Excel-based vendor comparison tool to customize the weightings for the factors that matter most to you (e.g., on-premises) to help shortlist the vendors that meet your unique requirements. In this way, you will create a custom evaluation that you can present to decision teams throughout the process. The Forrester Wave tool makes this easy to do.

Figure 2 Forrester Wave™: File Sync And Share Platforms, Q3 '13



Source: Forrester Research, Inc.

Figure 2 Forrester Wave™: File Sync And Share Platforms, Q3 '13 (Cont.)

	Forrester's Weighting	Acellion	Acronis	AirWatch	Alfresco	Box	Citrix	Dropbox	Egnyte	EMC	Google	Hightail	IBM	Microsoft	Novell	Salesforce.com	WatchDox
CURRENT OFFERING	50%	3.45	2.88	2.83	2.60	3.63	2.95	2.68	3.25	3.43	2.00	2.50	3.50	2.18	2.08	2.80	3.13
Mobile devices	10%	2.50	2.00	3.00	2.00	4.00	3.50	3.50	2.50	3.50	2.00	3.00	2.50	0.50	2.50	2.00	2.50
Browsers	0%	5.00	4.00	4.00	5.00	5.00	5.00	5.00	5.00	5.00	4.00	5.00	5.00	4.00	4.50	5.00	5.00
Computers	0%	4.00	4.00	4.00	4.00	4.00	4.00	5.00	5.00	4.00	4.00	4.00	3.50	2.00	4.00	4.00	4.00
Viewer support	0%	4.00	3.00	5.00	4.00	5.00	2.50	3.00	3.00	5.00	5.00	5.00	0.00	3.00	5.00	3.00	5.00
File access	10%	5.00	3.00	3.00	4.00	5.00	3.00	2.50	3.00	4.00	1.00	2.00	4.00	2.00	3.00	3.00	3.00
External sharing	10%	3.50	4.00	2.50	3.00	4.50	3.00	2.00	4.50	3.50	2.00	4.50	4.50	2.00	3.00	3.00	4.50
Search	5%	2.00	3.00	3.00	3.00	3.00	3.00	2.00	2.00	1.00	3.00	4.00	3.50	3.00	3.00	3.00	5.00
Apple App Store reviews	10%	2.00	2.50	1.50	2.50	3.00	2.50	4.00	3.50	3.50	3.00	2.00	2.50	4.00	0.00	0.00	1.00
Sync control	10%	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	1.00	1.00	3.00	1.00	3.00	3.00	3.00
System-of-record integration	15%	3.00	1.00	1.00	1.00	2.00	0.00	2.00	1.00	1.50	0.00	1.00	2.00	1.00	0.00	5.00	1.50
Deployment flexibility	5%	4.00	4.00	4.00	4.00	2.00	3.00	2.00	4.00	4.00	2.00	2.00	5.00	4.00	1.00	2.00	4.00
Security model	15%	5.00	4.00	5.00	2.50	5.00	5.00	3.00	5.00	5.00	4.00	3.50	5.00	2.50	3.00	3.00	4.50
Administration	5%	4.50	5.00	4.00	3.50	5.00	5.00	3.00	4.50	5.00	4.00	4.00	4.50	4.50	4.00	2.50	4.50
Content analytics	5%	2.50	1.50	1.50	2.00	2.50	3.00	1.50	3.50	4.00	1.00	1.50	3.00	2.50	1.50	2.50	3.00
STRATEGY	50%	2.80	2.43	3.18	3.08	3.65	3.73	3.48	3.38	3.65	3.70	3.03	3.55	3.20	2.43	3.35	3.20
Mobile strategy	15%	3.00	3.00	5.00	4.00	4.00	4.00	4.00	5.00	5.00	4.00	3.00	3.00	3.00	4.00	4.00	4.00
Collaboration strategy	15%	2.50	2.00	2.50	3.50	3.00	3.00	2.00	2.50	2.00	5.00	3.00	5.00	5.00	3.00	4.00	3.00
API strategy	15%	2.00	1.00	2.00	4.00	4.00	3.00	5.00	3.00	3.00	3.00	2.50	3.00	2.00	0.00	2.50	3.00
Market experience	15%	2.00	2.00	2.00	1.00	2.00	4.00	3.00	3.00	3.00	1.00	2.00	0.00	1.00	0.00	0.00	2.00
Organizational commitment	15%	5.00	4.00	4.00	4.00	5.00	5.00	5.00	5.00	5.00	4.00	5.00	5.00	4.00	4.00	5.00	4.00
Investment priorities	10%	4.00	4.00	4.00	3.00	5.00	5.00	4.00	3.00	5.00	4.00	4.00	4.00	2.00	4.00	5.00	5.00
Global presence	15%	1.50	1.50	3.00	2.00	3.00	2.50	1.50	2.00	3.00	5.00	2.00	5.00	5.00	2.50	3.50	2.00
MARKET PRESENCE	0%	2.60	2.70	2.10	1.80	2.80	3.40	3.10	2.10	2.50	3.20	2.00	2.80	2.80	1.60	1.60	1.70
Installed base	40%	3.00	2.00	1.00	1.00	2.00	3.00	3.00	1.00	1.00	3.00	1.00	1.00	2.00	0.00	1.00	1.00
Product revenues	10%	1.00	0.00	1.00	1.00	1.00	1.00	2.00	0.00	1.00	1.00	1.00	1.00	1.00	0.00	0.00	0.00
Product engineers	20%	3.00	4.00	3.00	3.00	4.00	4.00	4.00	4.00	3.00	3.00	4.00	4.00	2.00	3.00	2.00	3.00
Sales staff	20%	2.00	3.00	3.00	2.00	3.00	4.00	2.00	2.00	5.00	4.00	2.00	5.00	5.00	3.00	3.00	2.00
Partners	10%	3.00	5.00	4.00	3.00	5.00	5.00	5.00	5.00	4.00	5.00	3.00	5.00	5.00	4.00	2.00	3.00

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

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders

- **Box.** With an existing focus on file storage and strong mobile support, the move into sync and share was very natural for Box. While the offering is strong enough to land Box as a Leader in this Forrester Wave, the sync and share capabilities are far more relevant to organizations that use or plan to use Box for managing and storing their content in addition to sync and share. As Box continues to mature its platform strategy, its partner ecosystem becomes an important part of this equation. Organizations aggressively moving to the cloud should make Box's content storage an evaluation criterion for their online content management system as well. For example, cloud offerings like Salesforce, NetSuite, and Jive can store content natively in Box.

As a pure cloud offering, Box is not a fit for organizations that are not comfortable storing content in the cloud. While it is possible to utilize Box's sync and share functionality as a standalone feature, it is a better fit for customers that use the broader Box offering.

- **EMC.** Syncplicity launched in 2008 and recently became part of EMC's content services portfolio. By combining EMC's global sales and service capacity with the solid capabilities of the recently acquired Syncplicity product, EMC has created a strong offering. Areas of strength include security, deployment flexibility, and extensive viewer support for common file types. Syncplicity is a fit for organizations that require very tight control over content location — cloud versus on-premises — as well as fine-grained controls over the content itself. While content storage options are very flexible, metadata that is part of what EMC refers to as its "orchestration layer" must be stored in the cloud.

EMC has done a good job of driving integration between Syncplicity and the existing Documentum portfolio with content and workflow integration. So organizations with significant investments in EMC's enterprise content management system or EMC's storage products should give Syncplicity a hard look. However, EMC has not yet integrated Syncplicity with other content management systems like SharePoint, OpenText, and Oracle.

- **IBM.** With the release of IBM Connections 4.5, IBM has pivoted its flagship enterprise social offering toward an enterprise social and document collaboration offering. The underlying document management capabilities are provided by IBM's FileNet architecture and will undoubtedly prove to be enterprise-ready in terms of functionality as well as scalability. For many, Connections will become an important document repository. In order to fully serve customer requirements, IBM has extended the capabilities to include sync and share, both in the on-premises Connections and in the IBM SmartCloud Connections. The offering is feature-rich and, of course, highly integrated. This approach presents a double-edged sword for many looking to provide sync and share to the needs of a broad enterprise.

On one side, the approach naturally extends the social and document collaboration experience that IBM Connections customers have invested in beyond the firewall and to mobile devices. On the other side, the highly integrated nature of the offering makes it difficult to deploy to non-Connections users and difficult to leverage across disparate content sources. This offering is an obvious choice for companies with investments in Connections, but it may also be a draw for firms looking for an IBM stamp of approval on their document collaboration platform.

Strong Performers

- **Citrix.** Citrix continues to build its collaboration portfolio. ShareFile provides file sync capabilities to a lineup that includes the audio/video/webconferencing capabilities of the GoToMeeting family of products and the budding team site functionality from Podio. In our evaluation, the product scored well on security and administration as well as on market experience, organizational commitment, and a strategic focus on mobile devices. The product has been in market since 2005 and offers two deployment scenarios: hosted in Amazon's data centers or running on-premises. Citrix also offers a product called "StorageZone Connectors" to allow ShareFile to connect to files behind the firewall. As with other vendors in this rapidly changing market, the product shows that it's a work in progress with regard to its system of record integration as well as its API and collaboration strategy.

Forrester believes that ShareFile is a solid choice for companies, particularly small and medium-size businesses, looking for a low-cost, cloud-focused product with good workflow support.

- **Egnyte.** Egnyte differs from its "born in the cloud" competition in its ability to run a hybrid architecture, where files can be stored on-premises or in the cloud (or split across multiple locations) and the metadata access can run someplace else. This ability to split the hosting environment gives firms the flexibility to keep content under lock and key while extending the sync and share services out to mobile devices efficiently over wireless networks.

The product scores highly on deployment flexibility as well as on security, administrative controls, file sharing, and mobile strategy and support. The product has shortcomings in a number of areas, including a current lack of integration with content repositories such as SharePoint and Documentum (both under development) and an evolving but still limited global presence. Forrester believes that Egnyte's sweet spot is mobile and computer file sync and share where firms want to keep files on-premises but provide good performance over wireless networks.

- **WatchDox.** WatchDox's central theme is security. Advanced features include encryption of all documents on-disk and over the wire, granular control over the ability to download or open a document on any device, screen shot inhibitors, and optional document watermarking to determine document ownership in the event of a compromise. To date, WatchDox has demonstrated market traction with organizations that require this level of security, but with an

elegant user experience, the company looks to take a broader position in this emerging market. As part of this mass market push, it offers capabilities like Microsoft Office content editing and annotation within its controlled mobile app environment.

WatchDox does offer SharePoint integration and has indicated that it plans to offer further document repository integrations in the future. That said, the primary value proposition is around creating a very secure sync and share solution. Organizations that require deeper integration with existing back-end or client applications may not find WatchDox a fit.

- **Accellion.** A longtime player in secure external content sharing, Accellion has now extended its solution to include file sync across a broad array of mobile devices. Consistent with its legacy, Accellion continues to place a premium on security and emphasizes a private cloud architecture that provides IT with extensive control over data access and location. Accellion has an initial foray into system-of-record integration, and the architectural approach is both different and compelling. Accellion allows full search of SharePoint content repositories and fully respects all SharePoint security and library services. Content cannot be downloaded to devices without IT permission. In order to accomplish this, Accellion built custom SharePoint and Windows file server connectors with plans to extend this strategy to Documentum, OpenText, and iManage in the future.

Accellion offers a hosted alternative through Amazon Web Services but does not have a true multitenant SaaS offering. For organizations that require the benefits of a pure SaaS offering like rapid deployment, lower IT overhead, and the ability to start with a very small number of users, Accellion will not be the best fit.

- **Dropbox.** Known for an elegant user experience that has drawn more than 175 million users, it's likely that some of your employees are already using Dropbox to get work done. While many people, competitors in particular, will refer to this unsanctioned adoption as "the Dropbox problem," it may well be the Dropbox opportunity. In an era of IT consumerization, no other offering better exemplifies users voting with their actions (and often their own money) for their preferred solution. The consumer version likely in use by your employees is missing enterprise-grade security and administrative controls. However, Dropbox is beginning to add enterprise-grade features for security and administration to its newly named corporate version, Dropbox for Business.

Organizations requiring sophisticated security, integration with existing content systems of record, and extensive administrative control will still find Dropbox lacking. Forrester expects Dropbox to continue to add business features and controls and use its API strategy to help an eager cohort of partners to deliver more enterprise controls for some of those 175 million users.

- **Salesforce.com.** Salesforce.com announced Chatterbox at its 2012 Dreamforce Conference as a sync and share extension to all of its application functionality. It is particularly relevant to the company's social collaboration offering, Chatter. While the offering will not be in market until the latter part of 2013, Forrester felt it necessary to include it in the evaluation due to extensive interest on the part of our customer base. The functionality planned for the initial Chatterbox release provides a content-enablement strategy for Salesforce products. However, the real value of any Salesforce Platform offering is magnified when embraced by its partner ecosystem through Force.com and AppExchange. Chatterbox is also likely to play a prominent role in a fundamental strategy shift for Salesforce.com, as it facilitates access to, search of, and integration with on-premises content sources through its EntropySoft acquisition.

Chatterbox will be best suited to organizations that are comfortable with content stored in the cloud, as well as those that are strategically aligned with Salesforce.com and its partners' offerings.

- **AirWatch.** This rapidly growing startup with 1,500 employees began life as a mobile device management vendor to help companies manage apps, data, and security on smartphones and tablets. Following the needs of its customers, this Atlanta-based vendor branched out into file sync and share services in 2011. Three things define AirWatch's sweet spot in this market: a strong focus on mobile scenarios with its integrated mobile device management solution; the ability to deploy in a hybrid model, with files and metadata in the cloud or on-premises; and experience securing company-owned and employee-owned devices. The product has room to grow, as it lacks integration with many common file systems and document repositories; its content analytics are still minimal; and the product is still not widely deployed in the market.

This product should be on the shortlist for any company in either of these two situations: 1) using or considering AirWatch's mobile device management solution, or 2) looking for a mobile sync solution where content publishing — for example, updating sales catalogs or flight manuals or service instruction guides — is important. In both situations, this product is a good fit.

- **Google.** Google's value proposition is simple: Buy all of your collaboration capabilities from us, and we will make sure they are highly integrated and cheap. Thus, Google's file sync and share capabilities are simply an extension of the native Google Drive document storage capabilities. While the offering is not as feature-rich as some of the others in this Forrester Wave, for cost, integration, and usability reasons, Google enterprise customers should start their evaluation with Google Drive.

Google's bundled offering makes it difficult and cumbersome to deploy and manage for non-Google Apps users, but easy for Google Apps users. Organizations with more advanced requirements for security, external sharing controls, granular synchronization, and back-end content repository integration will need to look beyond Google Drive. Additionally, any organization requiring on-premises or private cloud implementation will need to look elsewhere.

- **Alfresco.** For organizations that depend on Alfresco for critical document management and need to extend those documents to external parties and mobile devices, this highly integrated approach needs to be on the shortlist. Alfresco elegantly blends its traditional on-premises offering with its new cloud capabilities to enable very secure sharing and mobile sync of all existing Alfresco content. Given its roots in document management, Alfresco offers an array of other integration options with SharePoint, IBM FileNet, and Windows file servers.

Alfresco's offering focuses on extending an existing system of record to include sync and share capabilities. With this sweet spot in mind, it is less viable for companies as a standalone tactical solution, particularly when Alfresco is not in place as the document system of record.

- **Microsoft.** Based on technology acquired from Groove nearly a decade ago, SkyDrive Pro is at once a new offering and one with deep technology underpinnings. The best fit is for Microsoft shops with strong support for Windows desktop and mobile clients and integration with SharePoint either on-premises or as part of Office 365. The solution can run either natively on SharePoint in an on-premises model or in the cloud in Office 365. It has strong administrative controls that will appeal to IT. It is also bundled with SharePoint at no additional cost. Organizations invested in SharePoint should evaluate SkyDrive Pro.

SkyDrive Pro will fall short for some organizations, particularly in advanced security and mobile support. While it offers good security, it does not offer document-level encryption, advanced mobile device security, and native document rights management like vendors whose security capabilities are their selling point. Microsoft has taken a "Windows first" approach to PC and mobile support meaning Apple Mac, Google Android, and BlackBerry users will have to wait and see if and when Microsoft offers support for those platforms.

- **Hightail (formerly YouSendIt).** Certainly Hightail understands the share part of sync and share. With 40 million users, the company has been helping organizations securely share documents externally for nearly a decade. It has a huge footprint of consumer and, more importantly, enterprise users. With the introduction of sync capabilities, it should be on the shortlist for organizations already using the solution for external sharing. In Forrester's evaluation, Hightail scored well in search, and you should expect search to become even more of an emphasis in its future strategy. With last year's acquisition of Found Software, Hightail will look to create a window into a broad array of back-end content repositories, thus making sync and share a consolidated access point to the disparate content sources that proliferate in many organizations.

Hightail's big bet is on search to unify content, but deep integration with system-of-record services will be minimal for the time being. Its security legacy is strong and will appeal to many organizations, but Hightail's capabilities are not as extensive as some other vendors in this evaluation. Forrester believes that anybody looking for a cloud-hosted file sync and share solution from a company with a track record of cloud expertise should consider Hightail.

- **Acronis.** Acronis' activEcho product is a recent addition to the company's portfolio of storage and access products. It offers strong on-premises architecture but can also be deployed in Amazon's data centers. In Forrester's evaluation, activEcho scored well in administrative controls, security, and partner file sharing.

The product has some notable gaps, including missing links to common systems of record (SharePoint only at this point), incomplete search capabilities, and a hidden API set. All of these things are on the vendor's road map for improvement. Forrester believes that this product is a good candidate for Acronis customers and for those seeking an on-premises solution.

Contender

- **Novell.** Once upon a time, document storage and Novell were synonymous. And while the number of document storage options in the enterprise has grown dramatically, many organizations still store vast amounts of content in Novell file shares. Filr provides the opportunity to reach directly into those repositories and enable sync and share for all of that content. Filr is deployed only on-premises for the time being, thus leveraging the Novell content repositories' native security capabilities. However, Novell Filr also offers support for Windows file servers.

It is important to note that Novell's offering in the space is very new and will be generally available around the time this Forrester Wave is published. Given the relevance to Novell's large customer base, Forrester felt it essential to include it in this evaluation. And we see Novell's global partners already starting to create services around this offering for customers, including tackling the management of the environment for IT departments.

SUPPLEMENTAL MATERIAL

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 three data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with two to three 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.

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 document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we 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.

ENDNOTES

- ¹ Since 2009, the collaboration market has seen significant disruption from consumer-focused offerings, cloud-based entrants, as well as repositioned offerings from traditional content and collaboration vendors. At the same time, demand for mobile document collaboration has resulted in new requirements that drive users to self-provision solutions if IT is not immediately responsive. This new chaotic vendor landscape coalesces around document collaboration, but vendors have very different strategies around the role of content in a knowledge worker's daily life. It is imperative for the CIO to understand vendor strategy in selecting the right solution. See the May 30, 2013, "[Document Collaboration Vendor Landscape](#)" report.
- ² Forrester surveys information workers in 17 countries. This statistic comes from a Q4 2012 survey of 9,903 information workers. See the May 9, 2013, "[Benchmarking Mobile Engagement: Consumers And Employees Outpace CIOs' Readiness](#)" report.
- ³ Source: Forrester Research World Tablet Adoption Forecast, 2012 To 2017 (Global).

- ⁴ Source: Forrsights Workforce Employee Survey, Q4 2012.
- ⁵ Thirty-four percent of survey respondents indicate that some members of their teams are in adjacent buildings, in a different time zone, and/or in a different country. Source: Forrsights Workforce Employee Survey, Q2 2012.
- ⁶ An advanced product like BoardVantage prices at a premium level, but handles complex security scenarios such as distributing and retiring materials on tablets for the board of directors. Other offerings have a basic level of storage and service at a relatively low price (though still expensive when compared with basic email).
- ⁷ Dropbox pricing is transparently available on their website. For 100 users, the annual subscription is \$12,730, which comes with unlimited storage, single sign-on capability, and premium support. That makes the list price \$10.55 per user per month.

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