Gartner Licensed for Distribution

Market Guide for Content Collaboration Tools

Published 3 August 2021 - ID G00728309 - 10 min read

By Marko Sillanpaa, Lane Severson, **and 1 more**

Content collaboration helps employees create and collaborate and is essential for remote working, but content collaboration tools are not the only source for this functionality. Application leaders responsible for the digital workplace should use this Market Guide to evaluate the product landscape.

Overview

Key Findings

- Content collaboration is a requirement in the new work hub and is important for hybrid and remote-working scenarios, but identical capabilities are also available in cloud office suites and workstream collaboration platforms.
- The content collaboration tool (CCT) market has matured with a common set of features, causing some vendors to focus on domain or specialist business requirements to create differentiation.
- Content collaboration functionality is now a core feature of content services platforms (CSPs).
- The lack of an organizational approach to content collaboration will lead to growth of non-IT-sanctioned, consumer-centric technology. This will cause governance challenges for the organization.

Recommendations

Application leaders responsible for the digital workplace should:

- Rationalize content collaboration tools by reviewing the capabilities of existing new work hubs, workstream collaboration platforms and content services platforms used by the organization.
- Support departmental (like marketing) or process-specific (like agreement clouds) content collaboration use cases by focusing on differentiated functionality rather than commoditized file sharing.
- Implement CCT technology either as a new stand-alone platform or by reusing a capability in other platforms already in the organization to eliminate non-IT-sanctioned services.

Market Definition

This document was republished on 13 August 2021. The document you are viewing is the corrected version. For more information, see the *Corrections* page on gartner.com.

Content collaboration tools provide an easy way for employees to use and share content both inside and outside the organizations. Since these tools can be used to collaborate with customers, partners and suppliers, they often provide rich security and privacy controls. Today, much of this functionality also can be found in other tools such as cloud office platforms, workstream collaboration platforms, content services platforms and content services applications. Functional differentiators in dedicated CCTs are difficult to identify.

Market Description

CCTs, formerly content collaboration platform or enterprise file sync and share technologies, have taken a central role in supporting modern hybrid-work patterns for both collaborative and remote work. The market has matured quickly, and product differentiation among dedicated CCTs can be difficult to find. Content collaboration has also emerged in various other product stacks, and some CCT vendors have moved into adjacent and overlapping markets. Gartner retired its Magic Quadrant for Content Collaboration Platforms in 2020 partly because of this lack of differentiation (see Gartner Retires 'Magic Quadrant for Content Collaboration Platforms').

This Market Guide focuses on tools that support content collaboration. This functionality is typically deployed in two ways.

The first is as a foundational platform. Content collaboration is provided by some content collaboration tools but also through cloud office and content services platforms. Foundational platforms support multiple employee productivity or business use cases and are made available across the enterprise.

The second way content collaboration tools are deployed is as departmental applications. These are deployed for employees in a specific department or involved in specific processes, programs or projects.

The role of dedicated content collaboration stand-alone tools as a foundational platform has decreased as organizations deploy cloud office platforms with embedded CCT capabilities. Dedicated content collaboration tools are often deployed as general or business-case-specific tools supporting departmental or external content sharing needs.

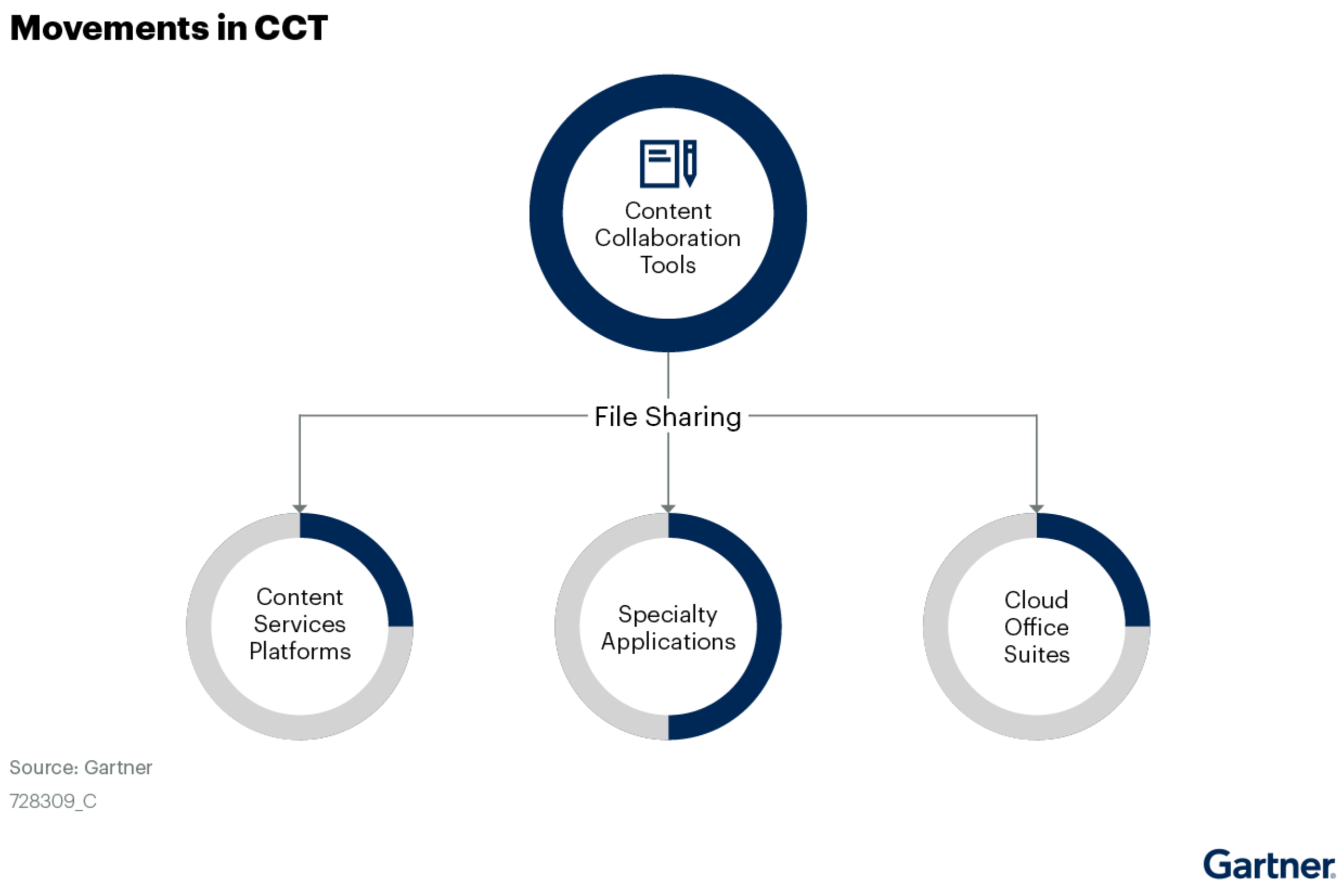
Market Direction

The market for content collaboration functionality and services has changed significantly over the past three years. Here are some of the key changes (see Figure 1):

- **Content collaboration tools became departmental —** Dedicated content collaboration tools still find use cases in simple content collaboration, usually at a departmental level.

- **Regional vendors emerged —** Regional vendors have emerged to address both localization of the UI, and data sovereignty and residency requirements.
- **CCT vendors extended into content services platforms features —** Some CCT vendors have added metadata and records retention capabilities, extending them in the CSP market.
- **CSP vendors added content collaboration functionality —** Many CSP vendors developed CCT capabilities or applications that work with their CSP.
- **Speciality applications provide file sharing —** Content applications supporting specific business use cases have started to provide content collaboration in areas like contract negotiation or board document sharing.
- **Cloud office suites include content collaboration —** New work hubs provide file-sharing capabilities integrated with their authoring tools and team collaboration tools.

Figure 1: Movements in CCT



The fact that content collaboration is embedded in broader feature sets indicates that the need for it has not gone away. The value of this functionality became very visible during mandated work from home resulting from the COVID-19 pandemic. Content collaboration functionality is a core requirement of "new work hubs," and organizations should ensure that this functionality is provided in their IT modernization strategy. A new work hub is a customer-assembled collection of personal and team productivity applications, along with services for development, automation and analytics, created for a particular constituency. The dedicated CCP has become less appealing as a stand-alone platform as organizations implement content collaboration as a component of wider solutions. Gartner expects the stand-alone CCT market to continue to grow, but at an ever-slowing rate.

Market Analysis

The Use Cases for Content Collaboration Tools

CCTs continue to focus on five specific use cases:

- **Internal collaboration —** The collaboration across members of a department or team within an organization.
- **External collaboration —** Collaboration with parties outside the organization, including suppliers and partners.
- **Storage infrastructure modernization —** The transformation of network file shares.
- **File backup and recovery solution —** The replacement of dedicated desktop, server and mobile device backup and recovery solutions.
- **Large file transfer —** A service for the transfer of large files instead of using email, messaging or legacy FTP solutions.

The ease of procurement and deployment of content collaboration tools allows them to be provisioned directly by business users and used for discrete teams, departments or projects. Because of the prevalence of consumer and freemium models in the CCT market, we also see employees making their own decisions to use these platforms. Adoption was accelerated during mandated work from home as organizations quickly acquired solutions to support their remote workforce.

Key features of content collaboration are:

- **Collaboration:** The ability to share, and collaborate within, content in real time with colleagues inside and outside the organization.
- **Content intelligence:** The provision of granular levels of security and more advanced features, including mobile device and digital rights management.
- **Administration and implementation:** Capabilities to control the administration of the platform and migration.
- **Integration:** Integration with other productivity-focused sources, including cloud office and workstream collaboration tools.
- **File synchronization:** The basic ability to synchronize files across online services and devices.

The prior Market Guide also addressed content services functionality. This is not considered in the current Market Guide because it is rarely available in a dedicated CCT.

The Movement Away From Content Collaboration Tools

The ease and accelerated adoption of CCTs during the pandemic created some small digital transformations that address employee-, customer- and partner-facing collaboration. Organizations that had not considered digital workflows were forced to do so but often did so with little preplanning.

CCTs can be used for simple content routing and approval, utilizing a lightweight workflow to route content for review, approval and signoff. While this may address an organization's immediate needs, the lack of features found in traditional content services functionality, such as metadata, robust workflow and records management, becomes evident. At this point, organizations often look to develop a formal cloud office or content services strategy.

The pandemic also created budget pressure for organizations that, combined with the adoption of cloud office, caused many organizations to review their needs for a dedicated CCT.

Market Themes in CCT

Four general themes in CCT have surfaced. The first two represent the continuing use case for CCT, and the last two move away from dedicated CCT:

- **Simple content collaboration —** Cloud office suites now set the baseline functionality for content collaboration by providing collaboration, synchronization, security and easy administration. But use cases where content needs to be shared with other business units or outside parties have some organizations considering a separate CCT for collaboration.

- **Continued interest in regional platforms —** The need for data sovereignty and residency especially around personally identifiable information can be driven through regulation or geographic preferences. Many regional platforms provide a minimal set of collaboration features, usually a localized UI and local servers. Over time, these regional CCTs may also see a shift toward regional cloud office tools or content services platforms.

- **Content requires more than collaboration —** The needs for governance, classification, insight and workflow are a natural evolution of collaborative use cases. This functionality is provided by CSPs. Many CSPs are now providing their own integrated CCT, and a few CCTs have added functionality provided by CSPs moving them into that market.

- **Unique features for specialty use cases —** Simple content collaboration also has a strong role in some business processes. Specialist applications have emerged that provide both file sharing and additional business functionality to support those processes. For example, mergers and acquisitions require the sharing of large collections of files with various parties.

Often these activities are outside the purview of IT. Other examples are deal room solutions and negotiation clouds. These specialist applications are not covered in this Market Guide.

Representative Vendors

The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.

Market Introduction

We consider the vendors listed in Table 1 to be representative of the various types of content collaboration tools market. The listed vendors have achieved some degree of visibility and traction in this market and their represented submarket.

Table 1: Representative Vendors in the Content Collaboration Tools Market

Vendor	Product
Acronis	Acronis Cyber Files
AISHU	AnyShare Family 6
Alibaba	DingTalk Docs
Axway	Axway Syncplicity
Box	Box
Citrix	Citrix Content Collaboration
Dropbox	Dropbox
Egnyte	Egnyte
FileOrbis	FileOrbis

Google	Google Drive
Hyland	ShareBase
Inspire-Tech	EasiShare
Lenovo	Lenovo Filez
M-Files	HubShare
Microsoft	Microsoft 365
Nextcloud	Nextcloud
Objective	Objective Connect
OpenText	OpenText Core Share
ownCloud	ownCloud
SER Group	Doxis4 iRoom
Thomson Reuters	HighQ
Tresorit	Tresorit

Source: Gartner (August 2021)

Market Recommendations

Application leaders in charge of content collaboration as part of a digital workplace application strategy should:

- Implement a new dedicated CCT only after:
  - Evaluating the content collaboration functionality provided by existing tools. Review capabilities provided by cloud office tools, workstream collaboration platforms and content services platforms. Most content collaboration needs are often provided by cloud office tools or workstream collaboration platforms.
  - Reviewing all functionality needed for the use case. Specialist applications provide content collaboration along with other functionality, such as agenda planning along with sharing board content or electronic signatures along with sharing a contract.
- Consider a dedicated CCT when:
  - Data sovereignty or residency is a concern. Look to dedicated CCTs that are located or have instances in the region where this is a concern. Address sprawl by selecting vendors that can support many of the regions you need.
  - The risk of accidentally sharing privileges is a major concern. Security and ethical walls cannot get around human error. Deploy a separate instance of your chosen content collaboration tool for this smaller audience.
  - Mandated by a third party. Consider synchronizing the content in your existing content collaboration tool with those mandated by a regulator or business partner.

Note 1
Representative Vendor Selection

The vendors in this Market Guide were selected to represent those with products that support most of the high-level capabilities mentioned in the Market Definition section. In addition, their products are marketed and sold specifically as stand-alone content collaboration products or as content collaboration modules in larger suites, and they are bought and used for this purpose. Finally, the listed vendors have achieved some degree of visibility and traction in this market.