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Magic Quadrant for Content Collaboration Platforms

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Analyst(s): Monica Basso, Karen A. Hobert, Michael Woodbridge

Summary

Content collaboration platforms are the evolution of the EFSS destination products and address digital workplace enablement strategies. Application leaders can choose among a range of options to transform individual productivity, team collaboration and business workflow automation.

Strategic Planning Assumption

By 2020, 80% of large and midsize organizations in mature regions will have deployed one or more content collaboration platform (CCP) products to implement a content productivity and collaboration strategy.

Market Definition/Description

Gartner defines the CCP market as a range of content-centric platforms enabling secure file productivity and content collaboration for individuals and teams as well as supporting the creation of a modern digital workplace. Core functionalities include mobile access to content repositories; file synchronization across devices and cloud repositories; file sharing with people and applications inside or outside the organization; and file search and retrieval across multiple file repositories. In addition, these platforms support, at different levels, collaborative document creation and teamwork, lightweight content management, and workflows, natively or through integration with third-party tools. Deployments can be in public cloud, hybrid cloud, private cloud or on-premises architectures. CCP offerings present different levels of support for:

Mobility, with native apps for mobile devices, notebooks and desktops, as well as web browser support; and integration with third-party mobile apps for productivity or management.

Simplicity and usability with modern UIs and optimized interactions, such as file drag and drop and file open-in mobile applications.

File manipulation, including easy file access, synchronization and sharing.

User productivity, such as file creation, editing, annotations, tagging and note taking – natively or through integration with third-party suites, such as Microsoft Office 365 apps or Google Docs.

Collaboration, such as team workspace and folders, cooperative editing, change tracking, and comments on files and conversations.

Content management, including metadata classification, search, retention policies, audit trail, e-discovery and analytics.

Workflow, including document-based process automation with actions on files, task notifications, metadata and users, and file handling triggered by specific events.

Analytics, including data collection on content usage, business relevance, user preferences, work patterns, social interactions and more.

Security and data protection on connected devices, in transit and in cloud services (or servers). It includes password protection, remote wipe, data encryption, data loss prevention (DLP) and disaster recovery management (DRM).

Data governance, including file access control, retention, centralized oversight and data residency.

Administration and management, including integration with standard enterprise identity, access management and authentication protocols, performance reporting, and centralized management tools for the operational management of the platform.

Integration with corporate on-premises data infrastructure, enterprise servers and cloud services; also, support for content management interoperability services (CMIS), APIs and design tools.

Storage, with some using a central data repository, cloud-based or on-premises, and others integrating with existing third-party repositories. Cloud storage may include unlimited storage space per user.

Gartner defined this market as enterprise file synchronization and sharing (EFSS) in 2013. We have renamed it CCP in 2017 to align the market name with the evolution that file syncing and sharing offerings went through over the past years. This evolution saw offerings expand well beyond initial file synchronization and sharing functions to deliver content-driven collaboration among individuals and teams, lightweight content management, and file-centric workflows. This transformation has been described in the document "The EFSS Market's Future Will Present an Opportunity for IT Planners" – and in the 2016 "Magic Quadrant for Enterprise File Synchronization and Sharing," where this market change was anticipated. This renaming also recognizes the changing nature of work and use cases.

CCPs originate from the EFSS "destination" offerings that were covered in the 2016 Magic Quadrant. As such, they are expected to be stand-alone products with file sync and share as the core capability enhanced by collaboration and content management functions. Organizations normally consider CCP offerings for use cases focused on user productivity, external collaboration, and modern and agile work environments; and end up purchasing a new product or service to complement existing content solutions. This Magic Quadrant focuses on stand-alone CPP products because they represent the most complex investment decisions for organizations; leveraging CCP extensions of a deployed collaboration platform is a relatively simpler task.

Magic Quadrant

Figure 1. Magic Quadrant for Content Collaboration Platforms



Source: Gartner (July 2017)

Vendor Strengths and Cautions

Accellion

Accellion (<http://www.accellion.com/>) is a private company, founded in 1999, with headquarters in Palo Alto, California, U.S., and offices in Stuttgart, Germany; London, U.K.; Singapore; and Ukraine. The company originally served the managed file transfer (MFT) market. Since 2010, its offering has focused on mobile file synchronization, sharing and progressively expanded to collaboration inside and outside the organization. Its CCP product, kiteworks, supports back-end and bidirectional integration, centralized security, and management aimed at compliance across the file-sharing ecosystem. The user interface supports a consistent experience across mobile, browser, email and desktop clients. A technical partnership with Microsoft has resulted in greater integration of kiteworks with Outlook, SharePoint, OneDrive for Business and Office 365 interfaces, improving usability and delivering a seamless user productivity experience. The kiteworks architecture employs a multitier model that separates the web, application and data

layers. The product can be deployed on-premises, as a private cloud (either on-premises or hosted via Azure or Amazon Web Services [AWS], including the Federal Risk and Authorization Management Program [FedRAMP] cloud instance), as a hybrid cloud or as a public cloud. The hybrid model can combine the on-premises component with public and private cloud services. This architecture is conducive to bidirectional integration with enterprise applications and workflows.

Accellion serves midsize to large regulated or security-conscious organizations, particularly in the government, healthcare, technology and professional services sectors. Accellion is stronger in North America but has a growing presence in EMEA as well, expanding its salesforce with regionalized leadership teams and deeper business partnerships in key industries. It focuses on regulated industries, specifically healthcare, government and financial services.

Accellion is a good fit for organizations that prioritize secure and centrally managed access to a variety of corporate data repositories; and that require customized apps (mobile, web or desktop) to support document-centric business workflows, while ensuring data protection and compliance, particularly in regulated markets. Its MFT roots make Accellion an interesting player for use cases where large, complex files (1 terabyte and larger) need to be exchanged, such as for engineering groups, graphics shops and video/audio production houses dealing with large media files (for example, videos, source code and computer-aided design [CAD] files).

STRENGTHS

Accellion is a trusted provider for regulated organizations, thanks to its support for data protection and compliance. It offers extensive data protection features, including e-discovery and policy-based content retention. Regulation compliance includes Federal Information Processing Standard (FIPS) Publication 140-2, FedRAMP Authorization, the Health Insurance Portability and Accountability Act (HIPAA), the U.S. Federal Information Security Management Act (FISMA) and the Sarbanes-Oxley Act.

Accellion competes with larger players due to its ability to meet specific requirements of integration with existing corporate systems through multiple connectors and platform APIs for customizations. The flexibility in deployment approaches is beneficial when supporting application file management, B2B and infrastructure modernization use cases.

The revamped UI covers any user modality while providing more seamless experiences across productivity and mobile apps.

The kiteworks content platform has enterprise-grade RESTful APIs and software development kits (SDKs) for developers to build secure apps and custom integrations. A mobile container managed by IT administrators allows content to be kept securely on a mobile device, while restricting editing, forwarding and other users' actions.

CAUTIONS

Accellion is a small, private company, with limited presence among large enterprises. Current EMEA expansion and growth into larger customers, while a good sign, may stress its ability to provide support in the new regions and customer types. It is competing against larger and more mature players in a consolidating market.

Accellion hasn't innovated as quickly as its competitors on critical features such as user experiences and metadata management, tagging and analytics. Catch-up with competitors will be hard, as the market has expanded into teaming and other collaboration modalities.

Accellion's product pricing can be confusing, and some of its reference customers perceive kiteworks as expensive and as offering less value than competing products.

Accellion does not offer prebuilt connectors for IBM products, such as Connections, Connections Docs, Domino and FileNet; nor does it support Web Distributed Authoring and Versioning (WebDAV) or OpenID. However, Accellion's Enterprise Connect program provides connectors for other content repositories.

Axway (Syncplicity)

Syncplicity (<https://www.syncplicity.com/>), founded in 2008, has headquarters in Santa Clara, California, U.S., and offices in the U.S., Europe and India. It was acquired by Axway on 22 February 2017. Axway is a public company headquartered in Phoenix, Arizona, U.S., with a worldwide presence in the U.S., Brazil, Europe, China and other Asia/Pacific countries. Syncplicity benefits from this acquisition in terms of product portfolio, global sales, financial stability, developer community and potential growth in Axway's installed base. Leveraging Axway's Amplify platform that includes MFT, mobile application development (Appcelerator), API management and analytics, Axway (Syncplicity) can pursue more digital transformation, IT modernization, data governance and digital workplace opportunities.

The vendor's CCP product for user productivity and collaboration prioritizes on data infrastructure modernization, security and data governance. It can replace legacy storage, file shares and network drives. Other capabilities include data governance with fine-grained group security and IT administrative policies. A real-time document backup mechanism is enabled by a multifold synchronization feature. Rich platform APIs enable customers to develop custom functionality. The CCP can be deployed in public, hybrid or private clouds, or on-premises. With the Amplify platform, Axway Syncplicity can offer an extensive hybrid cloud content platform.

Axway (Syncplicity) sells its products directly through its sales organizations. In addition, sales are through a range of channel partners, including AT&T, CDW, Ingram Micro and Dell EMC. Main customers are large organizations with distributed locations in sectors such as manufacturing, financial, healthcare and automotive; and MSEs.

Axway Syncplicity is a good fit for large enterprises that want to enable productivity and team collaboration without forcing the adoption of a public cloud model. They prefer to modernize the existing data infrastructure through hybrid architecture that integrates with and manages corporate systems and new cloud services. It is a suitable choice for replacing or optimizing traditional storage with cloud options, and legacy FTP and backup services with modern synchronization and sharing mechanisms – all while meeting security and compliance requirements.

STRENGTHS

Axway Syncplicity provides connectors to integrate with on-premises, network-attached storage arrays, object storage APIs, and content repositories such as Microsoft SharePoint and OpenText Documentum. DataHub enables it to migrate, copy and sync content from existing enterprise repositories to Axway Syncplicity one; SyncDrive enables users to access files through their devices regardless of the folder or file sizes.

A policy-driven storage model allows customers to store data in different locations. This hybrid architecture can be built mixing Syncplicity public cloud storage in the U.S. and EU (based on AWS Simple Storage Service), private cloud storage and on-premises storage. Group-based

policies determine to which regional storage users are assigned.

Axway Syncplicity offers rich policy management and governance for IT administration to control access, protect data and secure file sharing at user and group levels. An administration console supports tracking and auditability of users, devices, content and reporting. References indicate that Axway Syncplicity is very responsive to customers' requests through a high-quality customer success program.

Axway Syncplicity offers extensive security features, including native DRM with policies, customer key management and geofencing; and compliance certifications, such as FedRAMP, FERPA, FISMA, HIPAA and ITAR. Policy-driven hybrid storage options address complex data residency, sovereignty and geolocation requirements.

CAUTIONS

Axway Syncplicity's collaboration capabilities are limited and mostly available through Office 365 integration for collaborative editing. It lacks team collaboration and project management support, such as likes, tasks and comments on files and folders, and download of multiple files in one step. Reference customers reported extended collaboration with external parties as cumbersome.

Axway Syncplicity offers limited support for integration with enterprise content repositories and business applications. Advanced content management capabilities such as user-defined metadata are missing. Future improvements are expected by leveraging Axway's Amplify platform.

Some reference customers reported limited visibility about product roadmaps and timelines, and delays in feature delivery and bug fixing. This has limited their ability to plan and prepare for change.

Axway Syncplicity has some limitations in DLP, reporting and e-discovery functionalities.

BlackBerry

BlackBerry (<https://us.blackberry.com/enterprise/blackberry-workspaces>) is a public company, founded in 1984, with headquarters in Waterloo, Ontario, Canada. Its background is in enterprise mobility, secure mobile productivity and collaboration. BlackBerry progressively integrated WatchDox's technology in the BlackBerry Workspaces offering, which focuses on enhanced security and content collaboration.

While available as a stand-alone product, customers more often purchase it through a service bundle or on-premises deployment within the BlackBerry Enterprise Mobility Suite, Content Edition. Workspaces integrates with BlackBerry Unified Endpoint Manager and BlackBerry Dynamics, enabling secure content sharing between BlackBerry apps (e.g., Work), BlackBerry independent software vendor (ISV) partner apps and multiple custom enterprise apps.

These applications and services expand the range of addressable collaboration scenarios. BlackBerry Workspaces can be deployed on-premises, in a public cloud or in a private cloud, with multiple hybrid options through a virtual appliance, and integrated with corporate applications through APIs. Enhanced capabilities include digital rights management, secure viewers, document editing, file-level comments and annotations. BlackBerry Workspaces supports cross-platform collaboration and can be deployed on the BlackBerry Dynamics platform environment.

BlackBerry sells to customers worldwide through its own sales team and channel partners, including service providers, carriers and ISVs. BlackBerry Workspaces is adopted in regulated sectors, such as financial services, government and healthcare, that deal with privacy and disclosure regulations; and in sectors where collaboration needs are combined with critical intellectual property rights (IPR) protection constraints, such as manufacturing, media and entertainment, and supply chain.

BlackBerry is a good fit for midsize and large organizations in regulated or IPR-sensitive sectors aiming to enable mobile worker productivity and secure document collaboration for internal and extended teams needing to work with sensitive information in a protected and managed virtual workspace. BlackBerry is suitable for high-security use cases involving externalization and mobility.

STRENGTHS

BlackBerry provides a rich user productivity and team collaboration environment across any client platform (beyond mobile), including document view, editing, annotation, search and user-activity reporting. Alerts and information notifications that appear on mobile apps or as pop-ups on desktop clients help with collaborative work.

BlackBerry WorkSpaces provides digital rights management (DRM), including policy restrictions on user actions, across any device. Other security capabilities include regulatory compliance reporting, geofencing and encryption key management. Compliance support includes FISMA, FedRAMP, HIPAA and International Traffic in Arms Regulations (ITAR). Policy-driven storage location and regional isolation of data centers enable data geolocation and meet data residency requirements.

A rich set of APIs and SDKs enables organizations and developers to integrate BlackBerry services into custom applications and workflows, and build new applications. Third-party apps can upload files, folder structures and permissions into a repository.

When deploying Workspaces together with BlackBerry Enterprise Mobility Suite, Content Edition, customers can implement unified management for users, devices and applications. Consistent access roles across multiple enterprise repositories can be implemented through a permission layer on top of connected content repositories' permissions.

CAUTIONS

References indicate that support has been less than satisfactory after the acquisition, with limited first-level support and escalation workflow.

References indicated that user license management and cleanup is limited, missing user offboarding and mass user cleanup/deletion, for example. Licensed user criteria need work to avoid counting inactive users for billing purposes.

References reported limited usability in the web UI, which is less intuitive than well-known personal cloud services; and limited IT administrator's support. Workspaces' DRM technology is not available in other BlackBerry products.

References indicated that reporting capabilities on user activities are limited, missing statistics such as last use date, for example. BlackBerry has fixed these and the above product deficiencies in the latest release.

Box

Box (<https://www.box.com/>) is a public company, founded in 2005, with headquarters in Redwood City, California, U.S., and offices in Europe and Japan. Box's cloud-based CCP aims to be the central repository for any enterprise content. It provides lightweight document workflow automation, business process enablement and platform APIs for customizations (Box Platform).

Box's services are available in the public cloud only, implemented in its own data centers in the U.S., or through AWS's, IBM's and Microsoft's (soon available) local data centers in other regions. Box supports user productivity and collaboration across any device – integrating with Microsoft Office 365 and Google G Suite. Enhanced capabilities for content streaming, real-time editing, machine learning and analytics are also available. Box provides rich security, compliance and administrative capabilities, such as cloud data protection and governance capabilities, including encryption key management of customers' content stored in the cloud (Box KeySafe) and flexible content geolocation technology (Box Zones) for storage.

Box sells its enterprise offerings through direct sales and a network of partners enhancing its services, including Amazon, Apple, IBM and Microsoft. Box is developing with IBM a content workflow automation environment. Box addresses verticals' business needs with a combination of technology, services and marketing programs. A number of very large deployments (in the range of many hundreds of thousands of users) indicates the scalability of Box's cloud solution. As an organization, Box has noticeable diversity-oriented values, and is quite active in nonprofit sector innovation and support.

Box is a good fit for public-cloud-friendly organizations prioritizing digital workplace transformation and business processes automation strategies. It is a viable option for stand-alone use cases, particularly when external-facing collaboration scenarios are involved.

STRENGTHS

Box has a strong vision on content services aiming to replace traditional on-premises content management systems and repositories. It delivers on that vision through enhanced capabilities on content transformation, streaming, real-time editing and machine learning, leveraging artificial intelligence technologies.

Box Platform is available in different bundles of resources, and its pricing model is based on monthly consumption. This new model addresses different business requirements, particularly in external-facing activities.

Box offers a content platform and developer program for creating custom applications and new digital experiences with the security and compliance profile of the Box app. Extensive mobile and web SDKs provide access to microservices for content uploads, comments, search and metadata functions, which enable application integration and UI customization.

Reference customers reported great experience with Box through analysis, implementation, deployment and technical support phases. The technical team works with customers' teams to design, configure and integrate Box services in the existing environment. Box's leadership and product team engage with customers to drive successful adoption of the platform.

CAUTIONS

Box's offering is available only as a public cloud offering, although organizations can choose regional data center implementations for the content repository. Hybrid cloud implementation with data storage on-premises is not permitted; therefore, customers need to migrate

corporate content to Box's cloud. Metadata will still be kept in the central U.S. data center, though. Clients should evaluate what data they store as metadata and whether the controls offered by Box are sufficient.

The Box Drive service is currently available only in public beta, and it requires online connectivity to enable user productivity.

Box service has limitations in terms of file size (maximum 15GB), and references reported issues on upload speed.

Pricing can be confusing for customers, who sometimes do not understand the different options or why Box is proposing one configuration instead of others – for example, why an enterprise license agreement (ELA) upgrade is offered. The new pricing for the platform is yet another model that could add complexity for platform customers.

Citrix

Citrix (<https://www.citrix.com/products/sharefile/>) is a public company, founded in 1989, with headquarters in Santa Clara, California, U.S., and Fort Lauderdale, Florida, U.S. It also has offices elsewhere in North America and in South America, EMEA and Asia/Pacific. Citrix is a leading player in mobility, desktop virtualization and end-user computing, and has successful offerings in networking, security, workspaces and collaboration.

ShareFile is Citrix's CCP product, with a value proposition that is focused on user productivity, collaboration, infrastructure modernization, security, compliance and integration. ShareFile supports hybrid architectures, with over 60% of its deployments being implemented in this way. Citrix extends its collaboration and productivity features to a range of other repositories, including file shares, on-premises content services platforms and other cloud services. Connectors to these services are natively with ShareFile.

ShareFile is sold as a stand-alone product and as an entitlement of other suites, including Citrix XenMobile (for enterprise mobility management [EMM]), Citrix Workspace Suite (for end-user computing, EMM and file sharing) and Citrix Workspace Cloud (for desktops, virtual apps, mobility management and file sharing as a service through partnerships with web platform providers). Citrix's ShareFile has a broad cross-industry appeal, with financial services and accounting having the largest installation base.

Citrix is a good fit for a broad spectrum of collaboration and productivity-based end-user scenarios, and the focus on security and compliance make them a good consideration for regulated industries. Citrix is often seen in shortlists for virtual data room (VDR) requirements.

STRENGTHS

Citrix acknowledges that many organizations deal with a variety of distributed and fragmented content repositories, and that migrating them to a public cloud repository is often not a viable option. So, in addition to a public cloud model, it also offers a hybrid architecture and a private storage model. Customers can store and manage data in Citrix's cloud in on-premises private data storage (Citrix's ShareFile StorageZones) or in supported third-party cloud storage. In addition, it enables integration through connectors, extending the capabilities of its platform to existing corporate repositories.

Citrix ShareFile enables customers to support file collaboration beyond regular client devices to virtual clients through integration with Citrix XenDesktop (desktop virtualization) and XenApp (app virtualization). It also integrates with XenMobile for Mobile Application Management (MAM), Citrix Podio (social collaboration and project management) and NetScaler for mobile and web application delivery control.

Reference customers commonly describe the ShareFile solution as easy to use and relatively straightforward to deploy, especially in environments where Citrix' infrastructure is already present.

Citrix support services were rated highly by clients that interact with Gartner, with timeliness to respond and quality of service described as the two main areas of client satisfaction. A number of clients describe this support as being one of the main factors in simplifying implementations.

CAUTIONS

ShareFile workflow capabilities are lightweight and limited to fairly linear process flows. Citrix is investing in this area and has recently released a product that takes the capability beyond document routing and approval to the definition and execution of custom flows. However, more complex workflow scenarios, such as those requiring recursive steps or integration into other systems, would typically need to be executed in other systems.

References indicated a lack of feature parity between the fully cloud-based and hybrid versions with on-premises storage. For example, no workflow integration for on-premises installations is available. Also, they occasionally reported a tricky implementation experience for integration with SSO network connectors in XenMobile environments.

ShareFile still lacks FedRAMP and FISMA compliance, although FedRAMP is being pursued during 2017.

ShareFile lacks a number of user-productivity integrations that are present in competing products including Slack, HipChat and Google Docs (these are under development).

Ctera

Ctera (<http://www.ctera.com/it-initiatives/private-enterprise-file-sync-share/>) is a private company with global headquarters in Petach Tikva, Israel, and a U.S. base in New York. It was founded in 2008 and currently has around 150 full-time employees.

Ctera's CCP offering is based on an underlying product known as the Ctera Enterprise File Services Platform. It provides enterprise cloud file management capabilities with an emphasis on security and data protection. This software component provides secure remote file sharing, collaboration and storage management features such as integrated backup utilizing either a dedicated cloud storage service (hosted in Azure or AWS) or on-premises data centers. Ctera can be deployed completely on-premises, in hybrid architectures and also as public cloud through its purely hosted SaaS version, recently launched. Ctera addresses the challenges of data infrastructure modernization, including protection of corporate boundaries and data migration. Ctera's solution is also available as a white-label option to be branded and customized on customers' needs.

Ctera's go-to-market strategy is based on an ecosystem of technology alliance and channel partners, including large service and telecommunications providers that rebrand and resell its solution to their own clients. Ctera also is selling its CCP product directly to enterprise clients through its sales organization. Primary markets outside of telecom providers are those markets for which security is a key consideration and include finance services, manufacturing and government.

Ctera is a good fit for organizations with highly distributed users and offices, and priorities on data privacy or data sovereignty. These organizations are looking to modernize their file storage infrastructure by moving to the cloud while maintaining security and data protection, but also pursuing greater degrees of collaboration.

STRENGTHS

Ctera competes in the CCP market by focusing on a unified offering for enterprise file management services. This includes enterprise file synchronization and sharing; local office file storage and VDI storage; and unified management, security and governance of this unstructured data. These services are rated favorably by references when compared to others in this market.

Ctera provides a range of deployment options including private cloud, hybrid and on-premises models. Organizations can also select their own cloud platforms and deploy Ctera technology as a purely software layer or subscribe to Ctera's fully hosted (in Azure or AWS) service.

Ctera's focus on file systems modernization rather than purely synchronization and share has led it to develop and provide a range of services to assist clients in the migration of the datasets to cloud-based solutions. This includes the ability to map existing file system access control levels to the new cloud-based storage.

Ctera provides rich capabilities for IT governance, data security and protection, enabling organizations to pursue digital transformation of the workplace while preserving control.

CAUTIONS

Traditionally, Ctera has been delivering on-premises and private cloud implementations. The SaaS offering for the Enterprise File Services Platform is nascent and currently has very limited adoption; as a result, it is not yet fully proven.

Ctera has limited support for lightweight content management features such as metadata management, tagging and e-discovery. Collaboration capabilities are also limited: features such as workflow, annotation, recommendations and comments that are common in collaboration-centric offerings are missing.

Ctera's ability to support integration with other systems is currently limited. There are no integrations to workstream collaboration tools, like Slack or HipChat, or business applications such as those available from Salesforce. Ctera-managed stores integrate with Microsoft Office 365 applications for collaborative editing; however, integration with SharePoint Online or SharePoint is not yet available.

Ctera is a small company compared with other vendors competing in this Magic Quadrant, despite its consistent channel network of partners and distributors.

Dropbox

Dropbox (<https://www.dropbox.com/>) is a private company, founded in 2007, with headquarters in San Francisco, California, U.S., and additional offices in the U.S., Europe, Israel, Australia and Japan. Dropbox is the best-known provider of cloud file storage and sharing services with the largest user base for consumer services. Dropbox delivers Dropbox Business, an enterprise-secure content platform for collaboration.

Dropbox Business is available as a public cloud service only, and it includes storage, file productivity and collaboration, central IT management, and security features. End users appreciate the simple user experience across any device platform. Teams can easily collaborate in real time with Dropbox Paper. It brings context and conversations to all types of content, from tasks and tables to code, videos and files. For large-scale deployments, Dropbox provides extensive security and administration features to give the needed visibility and control to manage a collaboration solution companywide. Management features include separation of personal and business data in two connected accounts, and remote wiping of business data from users' devices. The Enterprise plan is available for large organizations that require additional security management and control features.

The broad adoption by individuals continues to drive Dropbox's expansion in the enterprise market. IT departments often decide to convert individual or group usage of Dropbox into regular IT services with Dropbox Business. Selling directly and through channels, Dropbox has grown its customer base significantly across midsize enterprises (MSEs) and large organizations, particularly in industries such as media, technology, education, retail, professional services, industrial, transportation and housing. Dropbox is a best-in-class benchmark for ease of use. Its reputation as a consumer player occasionally raises concerns about its ability to support large organizations. However, clients value Dropbox's ease of deployment, scalability, regular upgrades, and presales and postsales support.

Dropbox Business is a good fit for organizations aiming to enable modern file productivity and collaboration with external parties, prioritizing on user experience and flexibility. In fact, with this enterprise offering, organizations can pursue broad user acceptance, particularly when users are familiar with Dropbox' service as a personal tool and accustomed to working with it.

STRENGTHS

Dropbox offers a fast and reliable desktop synchronization software client. It is based on optimized LAN synchronization (file changes are pulled from colleagues' Dropbox folders, not from the Dropbox server); delta synchronization, streaming synchronization (a shared file download can begin, while that same file is being uploaded to the server); and Smart Sync (users can access every Dropbox folder from their desktop, using no hard disk space). Automatic bandwidth optimization reduces Dropbox's impact on network bandwidth.

Dropbox runs a dedicated storage infrastructure for service performance and reliability. Dropbox's infrastructure footprint has 10 regional accelerators with 14 points of presence across the U.S., Europe and Asia, granting faster data access across the globe. Regional data location is now available in EMEA via Dropbox's AWS-based European infrastructure in Germany.

A content platform with extensive APIs enables custom integrations with business applications, content repositories and other clouds. A large developer and partner ecosystem has built thousands of app integrations on top of the Dropbox platform, generating more than two billion API calls per day.

References say users and teams are delighted with Dropbox Business' intuitive interface, simplicity and ease of use. IT administrators rate positively the rapid adoption process, self-service data recovery capability, performance and low impact on the network, scalability, and security.

CAUTIONS

Technical support is not always timely, as some references indicated a time frame of 12 business hours to get a ticket answered. The support "workflow" does not always meet the expectations of a big company with regard to escalation, support administrators, service-level agreements (SLAs) and tiered levels, for example.

Turnkey integration with corporate data infrastructure and applications is poor. For example, integration with Microsoft SharePoint, OpenText Documentum and Content Server, and IBM FileNet is missing. SharePoint integration for copying is based on third-party technology.

Dropbox does not support hybrid or on-premises deployment architectures. Despite the new EMEA data location capability, metadata is still kept in the U.S. data center, limiting flexibility for companies that have data sovereignty requirements.

References reported some limitations in administrative functionality, partly due to the rapid service evolution that affects IT administrative users' awareness.

Egnyte

Egnyte (<http://www.egnyte.com/>) is a private company, founded in 2008, with headquarters in Mountain View, California, U.S. It has offices in the U.S., the U.K., Poland and India. Egnyte addresses the enterprise market with a platform it describes as an "intelligent content orchestration platform." The value proposition for this platform is to provide content-related collaboration, governance and management capabilities using new and established content stores.

Egnyte Connect is a CCP targeted at digital workplace initiatives, including content collaboration and data infrastructure modernization use cases. The product provides federation capabilities through a single interface to integrate enterprise content from line of business applications and other content repositories. Egnyte Connect Desktop provides an integrated experience to users in one app, presenting files from multiple sources, and access to an entire file system in the cloud regardless of hard disk space (Egnyte Drive). It also provides data migration, archiving and centralized management. Egnyte is available for hybrid scenarios that combine cloud functions with on-premises storage and data repositories or with cloud repositories. It also supports pure cloud deployment. Egnyte has data centers in the U.S. and Europe. In addition, Egnyte Protect extends this orchestration layer to provide content security and data governance to remote content sources.

Almost all of Egnyte's client base is in the Americas with a small, but growing, market presence in Europe. Egnyte has relatively broad vertical coverage with its largest market presence in media and entertainment, financial services, and construction.

Egnyte is a good fit for organizations that struggle to get control of the increasing number of content repositories. Its focus on collaboration and governance, not just for its native repository but also remote sources, is a differentiating aspect of its offering. Organizations for whom security, privacy and geographical data residency are important should consider Egnyte, as these

areas are of considerable strategic focus for the vendor. In addition, organizations with distributed workforces and remote offices should consider Egnyte for its smart governance of storing and sharing files, and access to files depending on user profile.

STRENGTHS

Egnyte has a strong vision on content platform. It delivers a rich offering with platform APIs at both the user-interaction and infrastructure layers supporting both user-centric and IT-centric use cases.

Egnyte's expansion beyond the collaboration use case into governance and control at the enterprise layer is a key differentiator. The addition of "intelligence" utilizing machine learning and social graphs to drive automation activities further enhances its offer.

Egnyte strives to build strong partnerships with its clients during the onboarding, implementation and post-sales support processes. This partnership approach is appreciated by the Egnyte clients who interact with Gartner. Clients describe flexibility and responsiveness, particularly in the way in which they can adapt the product to meet emerging requirements.

Based on data available to Gartner, Egnyte ranks well in terms of customer satisfaction with the product, implementation, ability to meet business objectives and ongoing support.

CAUTIONS

Egnyte's value proposition is to act as a central orchestration layer with integration and governance capabilities. However, it only offers a limited range of connectors to third-party applications, content repositories and enterprise systems. References lamented a slow process getting third-party application vendors to build Egnyte plugins versus CCP competitors. Egnyte relies on third-party sync applications to provide connectivity to (or migration from) many remote repositories.

Enhanced security features, such as file-level encryption, geofencing, spyglass viewing and the ability to assign security permissions to users' private folders, are missing.

Egnyte lacks content management features, such as simple retention management. This may be a limiting factor for organizations considering Egnyte as a central content "control" platform. Reference customers reported in multiple interactions that the storage sync engine is not mature and needs improvement to guarantee stability.

Egnyte is a small company, compared with other competing vendors in the Leaders quadrant, in a consolidating market.

Google

Google (<https://www.google.com/drive/>) is a public company, founded in 1998, with headquarters in Mountain View, California, U.S., and offices worldwide.

Google Drive is a public cloud CCP offering available as a stand-alone product or bundled in G Suite. Google Drive is the central repository for all productivity, collaboration and communication apps in the suite, including Google Docs, Google Sheets and Google Slides for collaborative document creation. These browser-based applications introduced a new content creation style for collaborative cloud document creation. Google Drive also integrates with Gmail, Calendar, Docs and other productivity applications. Rich security includes external sharing controls, audits and alerts on document status changes, information rights management (IRM), DLP, search and e-discovery (Google Vault), and compliance certifications.

Google targets MSEs as well as multinational operations needing scalability and consistent performance across the world. Large IT organizations that face cloud adoption challenges value Google functionalities for large data migrations and data breach protection.

Google Drive is a good fit for organizations with a distributed and mobile workforce aiming to enable agile content productivity, team collaboration and collaborative document creation (with Google Docs). Google Drive is attractive for organizations that are prioritizing users' preferences and value for money. It is appropriate for organizations without regional storage constraints and not requiring deep integration with Microsoft Office or other third-party business applications.

STRENGTHS

Google has a renewed approach to enterprise priorities and needs, including IT users, IT administrators and business owners. A new executive team and enterprise veterans joined Google in the last 15 months, bringing more people and senior directors for product management. Organizational changes took place across the company, including the Google Drive team. References indicate better customer support and roadmap visibility.

Google envisions Google Drive's evolution through artificial intelligence technologies such as machine learning and natural language for classification and search to enable greater knowledge exchange among people and teams. New forthcoming features include Drive File Stream, operating as a network drive without limits on device storage space, and Quick Access for surfacing relevant information among multiple Team Drive instances.

Google has a global infrastructure for fast access to data that can store and serve large files (up to 5 terabytes) at high speed. Its worldwide customer support organization, enhanced by distribution partners, grants presence in many countries. Technical specialists and authorized resellers support customers of all sizes. Small businesses are served through online self-service channels.

Google's rich platform APIs enable developers to integrate existing business applications with Google Drive or build new ones leveraging their content. G Suite Marketplace provides multiple apps for integration with Google Drive.

CAUTIONS

Google Drive is available only as a public cloud offering. No hybrid storage model is available to keep files in private clouds or on-premises storage. Organizations must migrate files from existing repositories to Google Drive to address specific use cases. Google provides the AppBridge product for enterprise migrations.

Google does not currently support international data sovereignty and residency. Regional cloud implementations are planned but not available yet. Policy-driven storage location, regional isolation of data centers and geofencing are currently missing.

Google Drive has limited integration with existing IT systems and third-party IT products. It lacks native connectors to enterprise-content repositories and applications, such as Microsoft SharePoint, Microsoft Office Online and Office 365 apps. Integration with network drives and network-attached storage is limited, as is integration with other cloud providers.

Administration and reporting capabilities are limited in some use cases. Centralized management and access control for documents and folders are missing.

HighQ

HighQ (<https://highq.com/products/collaborate/>) is a private company, founded in 2001, with headquarters in London, U.K., and offices in the Netherlands, Germany, U.S., India and Australia. HighQ provides a broad offering, encompassing file productivity, team collaboration, project management, process automation and marketing. In addition to content collaboration, HighQ sells a virtual data room (VDR) product. HighQ's focus is on enabling teams with secure information sharing, collaboration and teamwork, both internally and externally, through one integrated platform.

HighQ Collaborate is a cloud collaboration platform for individual productivity and team collaboration centered on secure file sharing and document management, and including project management tools. Collaborate provides personal and team workspaces to sync and share personal work files or shared folders, accessible through a web interface, native desktop applications and mobile apps. Through a main dashboard, users get an aggregated overview of recent activities, tasks and messages per projects.

HighQ implements a private cloud architecture based on its own data centers (located in the U.K., U.S., Germany, Australia and United Arab Emirates) hosting its platform. In Asia/Pacific, it can set up a new location hosted by another service provider. For each customer, it deploys a dedicated copy of the application as single tenancy. HighQ provides hybrid file storage, allowing customers to store their files on-premises, but it does not offer a fully on-premises offering.

HighQ's traditional focus is on the legal sector. It is expanding in other sectors, including financials, pharmaceuticals, life sciences and professional services, that require secure file sharing, project management, transactional work and external collaboration. Typical use cases include extended collaboration between lawyers, advisers and compliance auditors, and external clients.

HighQ is a good fit for regulated organizations, particularly in the legal and financial services sectors, aiming to enable team collaboration and project management among employees and external parties.

STRENGTHS

HighQ provides one integrated CCP offering for users and teams, embedding core file sharing and document productivity tools. It includes project management and process automation tools; virtual deal rooms; and social interaction and communication features such as wikis, blogs, calendars, activity streams, profiles, messaging and structured data list management.

HighQ addresses concerns of regulated organizations and offers data protection capabilities, such as data geolocation, data sovereignty and regional isolation of data centers, through a choice of six existing data center locations or new dedicated ones. It also provides private cloud implementation with hybrid storage, encryption key management and single tenancy for compliance requirements.

HighQ enables document workflow automation, such as for signing and authorization processes, through integration with DocuSign and Adobe Sign. The company is working on enhanced data classification projects with banks using artificial intelligence, machine learning and DLP technology.

HighQ provides enhanced audit trail capabilities, with audit history of files, tasks and user activities supported for centralized oversight, reporting and management.

CAUTIONS

HighQ Collaborate has minimal integration support, missing, in particular, any connectors to cloud data repositories such as those of Microsoft Office 365, Box and Dropbox. Seamless integration is also missing between its Collaborate and Publisher products. It plans to deliver these features in future releases and offers APIs for partners to build connectors.

The HighQ Drive capability synchronizes everything that is in the personal area to the desktop, impacting the user's hard disk space availability.

Mobile support is limited and does not include Android. There is no Android-native app available, and Android users can only use the web-responsive application.

Currently, HighQ does not hold some industry-specific U.S. compliance certifications, although the company is working to add several, such as healthcare, in the coming months.

Intralinks by Synchronoss

Intralinks (<https://www.intralinks.com/>) is a public company, founded in 1996, with headquarters in New York, New York, U.S.; and offices in the U.S., Europe and Asia/Pacific. Synchronoss Technologies is a public company, founded in 2000, with headquarters in Bridgewater, New Jersey, U.S., and offices in North America and Latin America, Europe and Asia/Pacific. In January 2017, Synchronoss completed a cash-based transaction to acquire Intralinks Holdings.

Intralinks' CCP offering is Intralinks VIA for enterprise-secure content sharing and collaboration with external-facing business processes and sensitive data. Intralinks also traditionally offers Intralinks' Virtual Data Room Edition for specialized use cases, such as virtual data rooms, loan syndication, merger and acquisition (M&A) transactions, private equity fundraising, and clinical trials. With the acquisition, Intralinks products go to market within two different offerings: Synchronoss Enterprise for sales to all enterprises; and Intralinks for Strategic Financials, a VDR offering to support sensitive M&A and transactional activities.

Intralinks VIA can be implemented in a private cloud – three colocated facilities hold the data and account for the processing. Intralinks has regional data centers and can locally host customers' files with processing and controls. A hybrid architecture is not available. A recent development focuses on a mobile-first approach, delivering a common and adaptive experience across devices. Intralinks also introduced analytics and visualizations for content insight. Industry solutions for financial services and life sciences as well as connectors to content management (e.g., OpenText Documentum, Microsoft SharePoint and IBM FileNet) expand Intralinks' services for business processing. A single platform for content sharing and management, based on a common identity/access model, enables content access across applications, data protection and governance, and compliance reporting.

Intralinks VIA is a good fit for organizations that want a private cloud deployment with data protection, security and regulatory compliance, and require sharing sensitive data and external collaboration. Large enterprises already using Intralinks' specialized applications (such as those for the financial services, legal and life science sectors) can benefit from Intralinks' content platform and enable horizontal CCP use cases by means of Intralinks VIA.

STRENGTHS

The Intralinks VIA platform offers workspace capabilities for projects and teams, and enables content collaboration, teamwork and project management. Simple rule-based or multitask workflows are supported.

Intralinks has long-term experience in the financial industry, with a large customer presence in banks and securities. It offers a dedicated product line and sales support for the financial services industry; and transactional business processes and infrastructure specific to investment activities.

Intralinks' focus on securing sensitive information and metadata is attractive to regulated industries and customers interested in data privacy and compliance. Enhanced security capabilities include information rights management (IRM) and customer managed keys.

Synchronoss expands Intralinks' reach into accounts and regions that have been harder for Intralinks to break into; it extends operations, including data centers, channel partners and delivery models. Synchronoss also enforces Intralinks' mobility capabilities.

CAUTIONS

Intralinks' financial situation is unclear. The merger of the two companies has run into major problems, including the departure of C-level leaders, and has been accompanied by an uneven stock market performance. Synchronoss delayed publishing earnings reports for the first quarter of 2017. Investors are withdrawing, and a class action is being prepared. This situation concerns customers and may impair Intralinks' execution going forward.

Intralinks VIA lacks native integration connectors with most enterprise content repositories, except those of Microsoft SharePoint, Microsoft Office 365 and Salesforce. This limits the delivery of a seamless experience for digital workplace scenarios.

Intralinks does not hold some industry-specific U.S. compliance certifications, such as Payment Card Industry Data Security Standard (PCI DSS), the Family Educational Rights and Privacy Act (FERPA), FedRAMP and the International Traffic in Arms Regulations (ITAR), although supporting others, such as HIPAA.

Intralinks VIA's administration tools and reporting are lacking compared with other products. Customers comment that the tools are not robust enough, and reporting is limited when used for operational oversight and system management.

Microsoft

Microsoft (<https://onedrive.live.com/about/en-us/business/>) is a public company, founded in 1975, with headquarters in Redmond, Washington, U.S., and offices worldwide. Microsoft OneDrive for Business (ODB) is a CCP product available as a stand-alone cloud service, as an extension to Microsoft SharePoint Server or in Microsoft Office 365. ODB is a critical engine in Microsoft's integrated Office platform.

ODB can be deployed in several ways – in a public cloud either stand-alone or, most commonly, as part of an Office 365 subscription bundle; in a hybrid capacity, together with SharePoint 2016 using an app launcher; and on-premises, in SharePoint 2013 and SharePoint 2016 deployments. ODB is the unified sync client for Office 365, enabling integrated Office and file-centric experiences on desktops, browsers and mobile devices. ODB includes extensive support for file viewer types with video streaming. Microsoft runs a global support operation and cloud data centers. A new administration console for centralized ODB management can be enhanced with Microsoft's identity-centric Enterprise Mobility + Security (EMS) for mobile device and application management. Recent enhancements, including the OneDrive mobile app, OneDrive desktop sync client, customer key management and the introduction of connectors through the Flow integration, enhance users' experiences in the Office 365 productivity platform.

Although ODB is available as a stand-alone offering, organizations generally adopt ODB as part of an Office 365 purchase. The rapid adoption of Office 365 drives interest in ODB as buyers want to leverage the available service and cloud storage included in the suite.

Microsoft is a good fit for companies that have prioritized investment in Microsoft's office productivity and collaboration suites, content server platforms (such as SharePoint Server), SharePoint Online, and Office 365. It fits well with organizations that aim to leverage an integrated, cloud-based platform to enable digital workplace scenarios.

STRENGTHS

Microsoft ODB is available as part of Office 365 at no additional cost. Microsoft is using its dominance with the hosted Exchange offering in Office 365 to bolster its CCP adoption.

ODB is the unified file-centric syncing and sharing engine for Microsoft's Office products and Office 365 applications, supporting integration among them. This creates a seamless user experience for users of Microsoft applications, especially when working with enterprise content in SharePoint. It also expands OneDrive experiences with digital business workloads via the Flow connectors and other advanced Office 365 features.

Microsoft offers extensive security features in its cloud offerings, including ODB, Office 365 and Azure. These include client-managed encryption keys, global data centers that support regionalized data residency and privacy regulations. When deployed as part of the Office 365 suite, ODB can use Microsoft's identity-centric EMS security.

Customers find ODB deployment easy and efficient, and feel they gained value and operational efficiency after rollout. They noted that ongoing updates and new features continue to enhance their opinion and the value of the product.

CAUTIONS

Microsoft ODB lacks native connectors to some enterprise content repositories and business applications. References reported complexity of integrating with tools outside of Microsoft's ecosystem. This situation can be partly mitigated by the fact that most enterprise applications have native connectors into SharePoint, on top of which OneDrive for Business is built.

Enhanced enterprise-grade capabilities for ODB are only available with additional products, for example, connectors to non-Microsoft systems (with Flow) and group collaboration (with Teams or SharePoint).

Reporting capabilities are limited to 90 days of information retained in logs and are not isolated to ODB activities, requiring generation and management of ODB activity reporting and oversight, where needed.

References noted feature and functional gaps in ODB, for example, with respect to external collaboration, offline usage and sync performance, often related to old versions used in on-premises deployments. Commenting in ODB alone remains limited outside of Office and PDF files, despite complementary capabilities that can be found in Office 365 products such as Teams, Yammer and SharePoint.

Thru

Thru (<http://www.thruinc.com/secure-mobile-file-sharing/>) is a private company, founded in 2002, with headquarters in Irving, Texas, U.S. It has offices in North America, Europe, India and Australia. Thru's origins lie in the MFT and FTP markets. It expanded into enterprise file-sharing

services, which eventually became the company's focus. Its CCP solution is based on a service-oriented architecture and extensive APIs for building integration with multiple repositories. It can be deployed in public, private or hybrid clouds, or on-premises. In hybrid configurations, data files can reside in a third-party cloud. Thru has global data centers, cloud route optimization and Optiband, a bandwidth management technology that customers can take advantage of for poor connections (e.g., satellite), WAN acceleration and back-end regional syncing optimization of large file transfers. Thru focuses on security, workflows, mobile UI, integration with repositories and content management with metadata. The vendor prioritizes secure file-sharing needs for businesses with remote offices and cruise lines operating on high-latency networks like satellite connections. Thru provides plug-ins to productivity and business applications such as Microsoft Office 365. A new product, Optiflow, automates file sharing and workflows, expanding content orchestration capabilities for file movement between repositories in support of business process applications. This adds support for more traditional content management and retention use cases.

Most of Thru's customers are based in North America, with fewer in Latin America, Europe, Asia/Pacific and the Middle East. Thru is focused on the IT software, financial services, and oil and gas industries.

Thru is a good fit for midsize and large organizations aiming to improve collaboration through secure exchange of large files among departments, customers and partners using any device and from any location. It also is a good fit for enterprises aiming to support file exchange across multiple applications (such as CRM, ECM and ERP), and for those needing to send large files to geographically distributed locations with low-latency downloads and uploads.

STRENGTHS

Thru's MFT backbone and its Optiflow services can be used as a middleware layer for syncing and transforming files between applications and across digital business workloads.

Thru's Optiband optimization offers high-performance and high-speed file transfer of large, especially media, files across long distances or across low-bandwidth environments. These capabilities are typical of MFT providers and differentiate Thru from most CCP competitors that have traditionally focused on end-user experiences.

Thru provides flexible deployment options for storage in the cloud or on-premises, with centralized command and control over file syncing and movement across repositories. It also provides middleware-class integration capabilities for enterprise systems, services and applications.

Customers are highly satisfied with the flexibility, scalability and adaptability of Thru's CCP product and support services, which are critical needs for IT buyers.

CAUTIONS

IT-focused managed file transfer is geared to enterprise middleware scenarios rather than ad hoc user collaboration use cases.

Workflow is mainly concerned with the movement and transformation of files among source and destination environments, not supporting more complex tasks (although integrating with third-party platforms).

Back-end integration capabilities are limited, missing built-in connectors to most enterprise content platforms and repositories.

Even though cloud/hosted installations are simple, some customers expressed complex installation and setup for on-premises deployments, noting that support and careful planning is needed, especially when integrating with other systems and solutions.

Vendors Added and Dropped

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

Added

Ctera

HighQ

Dropped

Huddle — The vendor does not meet the revenue threshold for CCP business in 2016.

Varonis — The vendor's product, DatAnywhere, does not meet inclusion criteria for mandatory product features including collaboration support, connectors for integration with enterprise content repositories and business applications.

Honorable Mentions

The CCP market landscape has tens of vendors because it represents a subset of the broader landscape including vendors with file sync and share capabilities. Among vendors that did not qualify, many miss inclusion criteria such as CCP revenue, number of customers and size of deployments. Relevant CCP destination vendors, not included in this Magic Quadrant, are:

AeroFS: It provides an on-premises CCP with peer-to-peer technology and a central virtual appliance for management. The complementary product, Amium, enables content collaboration. Missing criteria: cloud CCP offering, revenue.

Amazon: It provides a complete offering for content collaboration, Amazon WorkDocs, as part of AWS, targeted to MSE market. Missing criterion: deployment size.

Autotask: After acquiring the cloud CCP vendor Soonr, it launched Workplace, a CCP product, in May 2017. Missing criteria: availability, revenue and deployment size.

CodeLathe: It offers private cloud file-sharing tools for users to access, sync and share files from any device — Tonido for consumers and FileCloud for businesses. Missing criterion: revenue.

Egress Software Technologies: It enables file share and collaboration with email encryption, file transfer and secure collaboration. This is delivered via its flagship CCP solution, Egress Switch. Missing criterion: revenue.

Eisoo: This Chinese vendor offers the AnyShare product for synchronization and sharing in Asia/Pacific. Missing criterion: geographical coverage.

IBM: It provides IBM Connections Files on Cloud, which is an integral component of the Connections Cloud family. Being an extension of IBM Connections, it does not qualify for inclusion. Missing criterion: stand-alone package.

ownCloud: It offers open-source CCP software that is available in a free community edition and a paid-subscription-based enterprise edition. It's a destination product that can be deployed on-premises or hosted in third-party clouds. Missing criterion: revenue.

Vaultize: It offers CCP and secure access to corporate data with mobile content management and DLP. Missing criteria: revenue and total paid users.

Workshare: It offers a CCP collaboration platform and is available in public cloud or hybrid offerings. Workshare has a significant presence in regulated sectors. Missing criterion: revenue.

Other vendors in a variety of markets offer CCP features in their products. They miss a stand-alone CPP offering; therefore, they do not qualify for inclusion in this Magic Quadrant. Samples are:

Business apps: Salesforce, SAP

Collaboration: CommandHub, Hightail, Micro Focus (Novell), SpiderOak, SpringCM, Zoho

Backup: Acronis, Druva, Commvault, Intermedia

Board portals : Brainloop, Boardvantage, Diligent

CSP: Alfresco , Hyland, Liferay, Litéra, OpenText, Oracle, Samsung SDS

EMM: CA Technologies, VMware AirWatch

MFT: Biscom, Cleo, Globalscape, Litéra, Nasuni, Resilio, Safe-T, totemo

Project management: Redbooth, Active Collab

Storage: Barracuda Networks, Hitachi Data Systems (HDS)

Virtual data room (VDR): ansarada, CapLinked, Firmex, Merrill, Onehub

Inclusion and Exclusion Criteria

To qualify for inclusion in this Magic Quadrant, vendors must meet the following criteria:

Offering: It has a CCP offering for business with core EFSS capabilities.

Revenue: Its CCP product and service revenue for 2016 must be \$20 million or more.

Geography: It has a presence in at least two geographic regions, with some personnel dedicated to the relevant product. No more than 70% of revenue may come from one geographic region.

Commercial availability: The CPP product has been generally available since 1 September 2016.

Packaging: The CCP product must be available as a separately billed, stand-alone product. CCP capabilities alone, bundled with a different product from the same vendor, are considered extensions and are insufficient for inclusion.

Total users: There must be at least 500,000 active, paid users among all the organizations that are licensed to use the product.

Largest deployment: At least one deployment must have 10,000 users.

References: Five customers must have deployed the service or product for a minimum of six months and have at least 1,000 paid users. Two of the references must have at least 4,000 paid users.

In addition, their CCP offerings must support a selected range of product capabilities:

File synchronization: This is support for transparent and automatic round-trip data synchronization between devices and the cloud service/server, or across multiple devices, for selected files or folders.

File sharing: This is support for multiple levels of file (and folder) sharing among devices belonging to the same person; different applications on the device; and people inside and/or outside the organization.

File access: This is access from a client application or browser to files stored in on-premises or cloud repositories, by direct access or copy to an internal repository. Use of third-party connectors is acceptable, but native support is rated higher.

User productivity: This includes document view, editing and annotation in the mobile, desktop and browser app, either through embedded native capabilities or through third-party tools (e.g., Office 365).

Mobile: This includes a native application for iOS and Android. Support for Windows and other platforms is optional.

PCs: This is support for sync on Windows PCs and Mac OS through a native stand-alone application. Web browser or email client plug-ins, as well as support for Linux platforms, are optional.

Security: This includes password authentication, lockout after a period of inactivity, selective remote wipe of the app and related files on the device, and data encryption at rest and on transfer.

Management: This refers to integration with LDAP and Active Directories for authentication, single sign-on, group policies, and centralized management tools that allow administrators to manage synchronization and control the content, access rights and user activity. Integration with EMM is optional.

Integration: Products must support at least one type of integration with corporate data repositories, on-premises or in the cloud – e.g., Microsoft SharePoint, Microsoft OneDrive for Business, Google Drive, Dropbox, AWS and Salesforce – or data infrastructure such as network-attached storage.

Platform: Products must include a content platform offering, with APIs, navigators, documentation, development tools, application management and an ecosystem of partners, for example.

Delivery model: This means availability as cloud services in public or private clouds, or as hybrid deployment, combining on-premises repositories with cloud-based CCP functionality.

Features provided by partners must be tightly integrated with the vendor's product and invisible to the end user.

Evaluation Criteria

Ability to Execute

Gartner evaluates vendors' execution on the quality and efficacy of the processes, systems, methods or procedures that enable the provider performance to be competitive, efficient and effective, and to positively impact revenue, retention and reputation within Gartner's view of the market. In the CCP market, large cloud providers and IT players with mature presence across regions and sectors normally present a strong ability to execute; smaller vendors, with limitations in company size, customer base, international presence and/or channels, or high-risk profiles such as new ventures, tend to be limited in execution.

See the main criteria for evaluation of Ability to Execute in the Evaluation Criteria Definitions section. The Overall Viability (including financials), Operations in multiple regions and Customer Experience criteria are highly relevant for buyers to assess new players' Ability to Execute. The Product or Service richness and maturity is highly relevant for buyers that want to assess how well their IT suppliers are evolving traditional products to meet CCP requirements.

Table 1. Ability to Execute Evaluation Criteria

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

Source: Gartner (July 2017)

Completeness of Vision

The CCP market originated from consumer trends, such as smart devices, personal cloud and bring your own device (BYOD) – in initial form focusing on file synchronization and sharing (EFSS). Then vendors progressively evolved to address content collaboration, content management, workflow automation and other capabilities. Vendors originating from consumer markets naturally understand the priorities of the digital workplace, centered on simple user

experiences, mobile and cloud agility. From there, they adapted strategies and evolved their offerings to address specific enterprise priorities, such as security and data governance. Vendors with IT backgrounds, instead, understand the IT organization's priorities (such as IT administration and back-end integration). However, they had to redesign their offerings to meet the users' expectations, which are about hiding IT complexity and getting a consumerlike experience. Buyers of CCP offerings need to consider their broader digital workplace scenarios, identify priorities and constraints, align their plans with the CCP dynamics and make decisions for long-lasting investments in this market.

File synchronization and sharing capabilities are core to these products and have been standardizing across products over time; still, performances are quite variable across vendors. On top of that, CCP vendors have built specialized capabilities, such as data protection, collaboration, content creation and business workflow. The product strategy criteria are highly relevant for buyers to identify vendors with a long-term vision that aligns with their company's objectives.

Table 2. Completeness of Vision Evaluation Criteria

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

Source: Gartner (July 2017)

Quadrant Descriptions

Leaders

Leaders provide mature offerings that meet market demand. They have demonstrated the vision necessary to sustain their market positions as requirements evolve. The hallmark of Leaders is that they focus and invest in their offerings to lead the market and affect its overall direction. Leaders can be the vendors to watch as you try to understand how new offerings might evolve. Leaders typically possess a significant, satisfied customer base, and they enjoy high visibility in the market. Their size and maturity enable them to remain viable under changing market

conditions. Leaders typically respond to a wide market audience by supporting broad market requirements. However, they may fail to meet the specific needs of vertical markets or other more specialized segments.

Challengers

Challengers have a strong Ability to Execute but may not have a plan that will maintain a strong value proposition for new customers. Large vendors in mature markets often may be positioned as Challengers because they choose to minimize risk or avoid disrupting their customers or their own activities. Although Challengers typically have significant size and financial resources, they may lack a strong vision, innovation or overall understanding of the market's needs. In some cases, they may offer products nearing the end of their lives that dominate a large, but shrinking, segment.

Visionaries

Visionaries align with Gartner's view of how a market will evolve, but they have fewer proven capabilities to deliver against that vision. In early markets, this status is normal. In more mature markets, it may reflect the competitive strategy of a small vendor (such as selling an innovation ahead of mainstream demand) or large vendor that is trying to break out of a rut or differentiate itself. For vendors and customers, Visionaries fall into the higher-risk/higher-reward category. They often introduce new technology, service or business models, but may need to build financial strength, service and support, and sales and distribution channels.

Niche Players

Niche Players do well in a particular segment of a market, or have a limited capability to innovate or outperform other vendors in a market. This may be because they focus on a particular functionality or region, or because they are new to the market. Alternatively, they may be struggling to remain relevant in a market that is moving away from them. Niche Players may have reasonably broad functionality, but limited implementation and support capabilities, and relatively small customer bases. They have yet to establish a strong vision for their offerings.

Assessing Niche Players is more challenging than assessing vendors in the other quadrants. Some Niche Players could make progress, while others might not execute well or may lack the vision to keep pace with broader market demands. A Niche Player may be the perfect choice to meet your requirements. However, a Niche Player also may prove to be a risky choice if it is moving against the market's direction, which may put its long-term viability in question.

Context

Digital transformation is a priority for organizations that aim to foster new work styles, approaches and paradigms in their workplaces through adoption of cloud, mobile and consumer technologies. The CCP is a major enabler for modern productivity, collaboration and efficiency, because it connects people and information in real time, eliminating inefficiencies. Simple deployments and rapid adoption by users make the CCP a priority for organizations that pursue IT modernization and digital workplace initiatives. CCP can feed a transformation in work styles and business processes, meeting business users' expectations while granting security and compliance to IT administrators.

The CCP is a top priority for organizations. A survey of Gartner Research Circle members in the fourth quarter of 2016 found that more than half had a public cloud-based CCP tool, and another 18% planned to deploy it. By 2020, 80% of large and midsize organizations in mature regions will have deployed one or more CCP products to implement a content productivity and collaboration strategy. The driving forces behind CCP adoption in the enterprise market are:

Mobility – The number of mobile and remote workers continues to rise in organizations. Mobile productivity and collaboration are often priorities to support workforces.

Cloud – Adoption of cloud services for storage, productivity and collaboration (in particular, Microsoft Office 365 and G Suite) is growing as organizations realize benefits.

Security – Growing security risks associated with digital transformation require support for data protection, regulatory compliance, data residency and ownership.

Content management – Organizations are reconsidering investments in traditional on-premises content repositories in light of cloud-based modern alternatives, including CCP.

Infrastructure modernization – Traditional enterprise network storage infrastructure, often fragmented and distributed, is limiting organizations.

Common user scenarios driving interest in CCP products are:

Workforce productivity – enabling access to enterprise content repositories from any device, content synchronization and sharing, and content editing, to boost users' productivity.

Extended collaboration – enabling team collaboration for internal and external users, with, for example, workspace, team folders and collaborative document creation, with appropriate data protection.

Governance – enabling extended collaboration with strict policy management, access controls, e-discovery and an audit trail for regulated scenarios with compliance requirements, such as legal and finance. This case often includes virtual data room or board portals requirements.

Lightweight workflow automation – enabling document-centric tasks and processes, triggering actions on given events.

Data infrastructure modernization – replacing redundant or fragmented data infrastructure with public or private cloud elements to enable modern productivity and collaboration scenarios.

Market Overview

CCPs originated from the EFSS market, which emerged in 2010 and evolved through commoditization and consolidation, forcing surviving players to expand their value propositions. Offerings evolved beyond initial file synchronization and sharing, with capabilities to support use cases in content-driven collaboration among individuals and teams, secure external collaboration, lightweight content management and file-centric workflows.

CCPs evolved from the EFSS "destination" offerings (see "The EFSS Market's Future Will Present an Opportunity for IT Planners") and are stand-alone products with file sync and share as the core capability. They are enhanced with collaboration and content management functions. Integration with cloud productivity and collaboration suites (e.g., Microsoft Office 365, G Suite) is

common now. Some players also developed native capabilities for collaborative content editing, such as Box Notes and Dropbox Paper, challenging the traditional definition of a document as a file. CCP vendors are increasingly integrating their products with workstream collaboration platforms (e.g., Slack, Microsoft Teams, Workplace by Facebook, Atlassian, HipChat and Cisco Spark) for more conversationally driven collaboration styles.

A look at the vendors in this Magic Quadrant indicates that different macro categories of vendors can be identified (although, some offer support in multiple categories):

CCP vendors with a strong value proposition on broader productivity suites and content creation support (i.e., Microsoft and Google).

CCP vendors with a strong focus on their own cloud-based content repository and storage, collaboration applications, and a platform offering to enable customizations and business application integration and developments (i.e., Box, Dropbox).

CCP vendors focusing on hybrid architectures that allow customers to preserve existing content repositories, avoiding migrations to the cloud, if not desired (i.e., Citrix, Egnyte, Syncplicity by Axway).

CCP vendors that specialize in team collaboration and support specialized use cases, such as VDR (i.e., HighQ, Intralinks by Synchronoss).

CCP vendors that specialize in large file transfer and optimization (i.e., Accellion, Thru).

These vendors bring "platform" as a common element in their offerings, including characteristics such as:

A repository

Integrated services

User interfaces and clients

Integration and extensibility

As with most platforms these days, users are able to leverage other repositories, services and clients that are not native to the platform. This is done with APIs, connectors and designer tools.

The emergence of personal and team "drive" folders, as an evolution of traditional desktop sync engines, is an interesting trend. Drives connect desktops to a cloud repository and, through file streaming, give users access to an unlimited file space without occupying their hard drive space. As CCP adoption grows in the organization, this capability can potentially become a replacement for traditional network drives and file shares.

In May 2018, the new General Data Protection Regulation (GDPR (http://ec.europa.eu/justice/data-protection/reform/index_en.htm)) will take effect as the new European privacy law, and it will have an impact on this market as well. GDPR will be a big theme over the next several months, because it imposes new rules on companies, government agencies, nonprofits and other organizations that offer goods and services to people in the EU, or that collect and analyze data tied to EU residents. Many CCP vendors are looking at this area, and some (e.g., Microsoft, Box, Dropbox and Egnyte) have already delivered compliance.

Emerging capabilities in these CCP products will enable further digital transformation use cases, especially the unique content platform with its APIs that enable organizations to access content repositories and build new applications that leverage enterprise content. In addition, machine-learning functions will increasingly help to automate content tagging and classification. Future evolution of these products toward digital transformation and digital business enablement could include blockchain and Internet of Things (IoT) scenarios. CCP can also be seen as a type of content services platform (see "What You Need to Know About Content Services Platforms") to provide structured content infrastructure services, such as a cloud repository. This can support simple content management use cases or replace traditional enterprise content management systems where simpler metadata modeling, retention management and business processing are required.

Gartner estimates that the EFSS market reached close to \$2.8 billion in 2016 and grew 40% year over year in revenue from 2015. The market also grew an impressive 39% year over year from 2014. Gartner forecasts the EFSS market will reach over \$9.2 billion by 2021, with a 32% compound annual growth rate (CAGR).

The CCP market is blooming in a much broader area populated by new or traditional markets that relate to enterprise content or enterprise collaboration activities that complement or partly overlap with it. In addition to CSP, a neighbor market is workstream collaboration services (WSC) (e.g., Slack), which focuses on conversations (see "Embrace Workstream Collaboration to Transform Team Coordination and Performance"). Another emerging neighbor market is that of cloud document creation (CDC) services, which focuses on real-time collaborative editing and may potentially disrupt the traditional notion of "file" and "content" (e.g., Quip, Evernote and Google Docs). CCP and CSP products are different from WSC and CDC ones – and the former vendors are increasingly pursuing integration with the latter ones.

Organizations consider CCP offerings for user productivity, external collaboration, agile data infrastructure and centralized governance. As organizations accelerate on digital transformation initiatives, we expect CCP investments will continue to grow and force organizations to reconsider traditional approaches to collaboration and content management.

Note 1

Digital Workplace

The digital workplace is a business strategy to boost employee agility and engagement through a more consumerized work environment.

Evaluation Criteria Definitions

Ability to Execute

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

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

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

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

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

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

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

Completeness of Vision

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

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

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

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

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

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

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

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.



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