

MarketScope for Enterprise File Synchronization and Sharing

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VIEW SUMMARY

In this research, we analyze the emerging market for enterprise file synchronization and sharing products, and cloud-based services. These enable better productivity and collaboration for mobile workers, granting IT control with security and compliance capabilities.

What You Need to Know

This document was revised on 19 March 2013. The document you are viewing is the corrected version. For more information, see the [Corrections](#) page on gartner.com.

Enterprise file synchronization and sharing (EFSS) offerings enable productivity and collaboration for mobile workers who use multiple devices, such as smartphones and media tablets, in addition to PCs. Organizations must deploy EFSS services to secure enterprise information assets. Failure to provide these capabilities will subject organizations to information leakage threats caused by users who move data through uncontrolled personal cloud services.

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MarketScope

The proliferation of consumer mobility, media tablets and bring your own device (BYOD) programs in the enterprise is increasing adoption of file synchronization and sharing offerings. A major limitation for individual productivity is that smart devices offer fragmented support for file system access, file synchronization and sharing. The increasing number of devices per person poses another problem with data alignment and synchronization. Personal cloud services — such as Dropbox, Apple's iCloud (see Note 1) and Google's Google Drive (GDrive) — are simple, available free of charge and elegantly solve sync and share problems, which is why smart-device users are adopting these services. They represent a serious security and compliance threat for an IT organization, because employees can share corporate documents with third parties, or store documents on home PCs and other personal devices, completely out of an IT organization's control. These trends have contributed to the emerging market of EFSS. IT organizations increasingly are demanding EFSS capabilities that enhance mobile workers' productivity and collaboration to limit security risks.

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A Crowded Space With Many Players

This market is still developing and relatively immature (see Figure 1).

Figure 1. The Emerging Market for File Synchronization and Sharing



NOTE 1 APPLE'S ICLOUD

Apple's iCloud service provides data-sharing mechanisms among multiple Apple devices. However, security risks and limited functionality limit adoption in the enterprise. Also, iCloud is only for Apple and Windows PC devices, and focuses primarily on managing music, videos and emails with limited and clumsy support for documents.

VENDORS ADDED OR DROPPED

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

GARTNER MARKETSCOPE DEFINED

Gartner's MarketScope provides specific guidance for users who are deploying, or have deployed, products or services. A Gartner MarketScope rating does not imply that the vendor meets all, few or none of the evaluation criteria. The Gartner MarketScope evaluation is based on a weighted evaluation of a vendor's products in comparison with the evaluation criteria. Consider Gartner's criteria as they apply to your specific requirements. Contact Gartner to discuss how this evaluation may affect your specific needs.

In the below table, the various ratings are defined:
MarketScope Rating Framework

Strong Positive

Is viewed as a provider of strategic products, services or solutions:

- Customers: Continue with planned investments.
- Potential customers: Consider this vendor a strong choice for strategic investments.

Positive

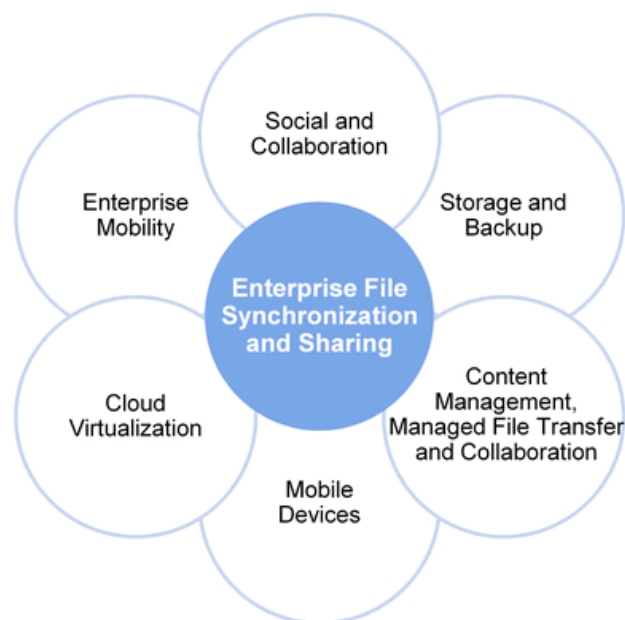
Demonstrates strength in specific areas, but execution in one or more areas may still be developing or inconsistent with other areas of performance:

- Customers: Continue planned investments.
- Potential customers: Consider this vendor a viable choice for strategic or tactical investments, while planning for known limitations.

Promising

Shows potential in specific areas; however, execution is inconsistent:

- Customers: Consider the short- and long-term impact of possible changes in status.
- Potential customers: Plan for and be aware of issues and opportunities related to the evolution and maturity of this vendor.



Source: Gartner (February 2013)

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The market includes a growing number of competitors originating from different markets and technology areas:

- **Social and collaboration:** Cloud or hybrid providers, such as Box, Dropbox, Oxygen Cloud, SugarSync, YouSendIt and WatchDox
- **Storage and backup:** Providers such as Egnite, Mezeo, Mozy, Druva and EMC (Syncplicity)
- **Content management, managed file transfer and collaboration:** Cloud or on-premises providers such as Accellion, Acronis, Alfresco, OpenText, IBM and Huddle
- **Cloud virtualization:** Providers such as VMware (Horizon Data), Citrix (ShareFile) and Cortado
- **Enterprise mobility:** Providers such as AirWatch, Fiberlink, Good Technology, MobileIron and Zenprise
- **Mobile devices:** Offerings such as Apple (iCloud), Google (GDrive) and Microsoft (SkyDrive)

Only a few vendors are getting broad visibility in international markets and across different sectors because of their company's or product's greater maturity. The technical barriers to entry are relatively low, so we expect to see more vendors launch their EFSS offerings in the next 12 months, or large IT players enter this market through acquisitions or by broadening their product portfolios.

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Three Architectural Approaches

Among various mobile file synchronization and sharing offerings, three categories are emerging:

1. **Pure cloud** (e.g., Box and YouSendIt): Corporate files that are accessed via mobile devices or shared are stored in the provider's cloud. This method is preferred by organizations that want to replace the personal cloud services adopted spontaneously by employees with an enterprise-class alternative under IT control, while preserving the user experience and enhancing mobile collaboration. This approach also is preferred by organizations that do not want to invest capital or resources in an EFSS solution.
2. **On-premises** (e.g., Accellion and Acronis): The mobile access, synchronization and sharing component is deployed on-premises and integrates with corporate data repositories, without file replicas. This method is preferred by organizations under strict regulations about data storage.
3. **Hybrid** (e.g., Oxygen Cloud and WatchDox): The mobile device authentication, security and search mechanisms are implemented in the provider's cloud, but files and documents are kept in their original location (data repository). This method is preferred by organizations that want to simplify mobile users' access to corporate data through the cloud, without creating data replicas in someone else's cloud. Regulated organizations, such as financial services, which need to maintain levels of control over information or data at rest for compliance for certain individuals or areas, while having benefits of cloud simplicity, sometimes select the hybrid method.

Figure 2 illustrates how these three architectures relate to EFSS hybrid and cloud services.

Caution

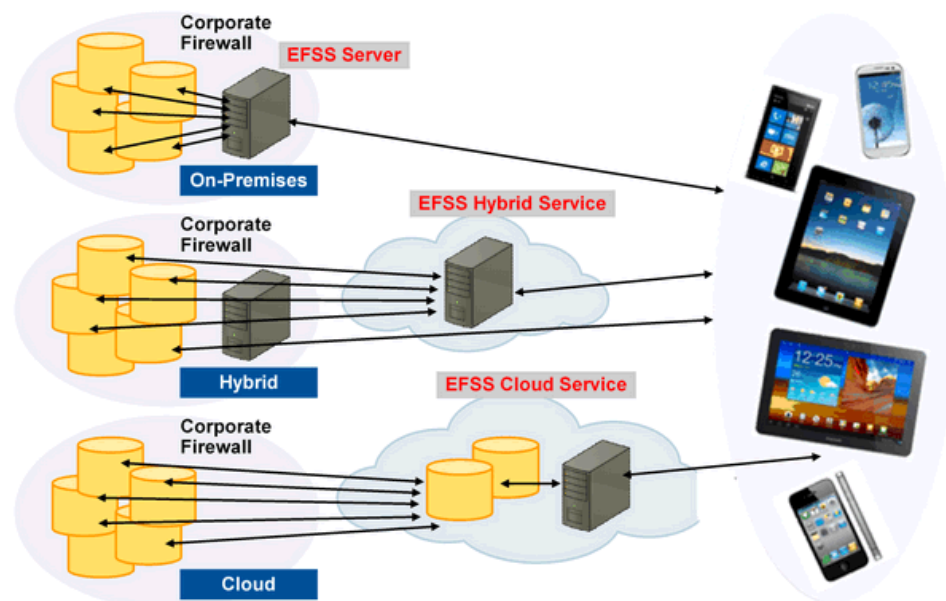
Faces challenges in one or more areas.

- Customers: Understand challenges in relevant areas, and develop contingency plans based on risk tolerance and possible business impact.
- Potential customers: Account for the vendor's challenges as part of due diligence.

Strong Negative

Has difficulty responding to problems in multiple areas.

- Customers: Execute risk mitigation plans and contingency options.
- Potential customers: Consider this vendor only for tactical investment with short-term, rapid payback.

Figure 2. Three Architectures for Market for File Synchronization and Sharing

Source: Gartner (February 2013)

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Critical Requirements

Given the IT organization's responsibility to protect the enterprise's information assets, file sharing and transfers to uncontrolled locations represent a great and growing security threat. Many of today's offerings do not fully meet enterprise control needs for security, compliance and management. We expect to see useful improvements over the next one to two years. Evaluating security and compliance risks will enable IT organizations to identify not only control priorities, particularly for data at rest on the device and corporate server, but also service access permission. EFSS offerings must support a combination of security features, depending on the level of control needed, including password enforcement, remote wipe, data encryption, data-loss prevention, containerization, digital rights management, acceptable use, access tracking and reporting.

Security, compliance and management are top priorities for IT organizations in EFSS, as well as in mobile device management (MDM). Organizations planning BYOD initiatives should include file synchronization and sharing requirements in conjunction with MDM. Basic EFSS capabilities can be purchased as part of many MDM suites.

Also consider mobile collaboration capabilities, such as back-end server integration with SharePoint, Active Directory, Lightweight Directory Access Protocol (LDAP) and others. Understanding the adoption of personal cloud services, such as iCloud and Dropbox, will help IT identify use cases for enhanced collaboration and productivity for the mobile workforce. Organizations that depend on email systems for file transfers and sharing should evaluate current usage of email attachments (e.g., size) to identify requirements for new EFSS capabilities. Cloud-based email services, such as Microsoft Office 365 or Gmail, support simple file sharing by sending links to partners. Sharing requirements that are basic, unlimited cloud email services may represent a viable alternative to EFSS. EFSS capabilities are also critical for Web conference sessions on mobile devices.

For all these requirements, organizations must focus on enterprise-class EFSS options. One solution may not be enough to meet the needs of complex organizations with multiple usage scenarios. Those organizations may need to buy a relatively inexpensive EFSS product to enable users to move documents onto media tablets, while buying a more secure EFSS option to support a sensitive, external collaboration scenario. The right approach is a mix of user segmentation, acceptable use cases, policies, and a combination of tools or capabilities available in other deployed products (e.g., in MDM) that enable IT to contain risks and costs, while providing enhanced collaboration and a great user experience.

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Market Evolution

The unauthorized adoption of personal cloud services raises security concerns and represents a major driver for investments in EFSS. Security and compliance requirements may slow down the adoption of cloud-based EFSS. Major roadblocks exist in regulated industries when the cloud provider is not certified or trusted by the regulator (e.g., the provider is located in another country or is under different legislation). Very few regulators have provided detailed guidance on the appropriate use of

public cloud computing, which discourages regulated organizations from using software as a service (SaaS).

Another issue that may limit EFSS adoption or investments on specific offerings is the cost. EFSS often adds to the cost of MDM or mobile applications. Cost optimization priorities may move investments to vendors that can offer EFSS and MDM.

In addition to the lack of budget for a service that most users find for free, no individual in most organizations owns the risks associated with employee-obtained EFSS. The CIO has no incentives to prevent the line of business from using something that it believes meets its needs.

While still under development, populated by a growing number of relatively immature players, this market will undergo increasing consolidation through acquisitions during the next two years. Companies with a strong vision of mobility, collaboration, content management, storage or cloud will likely acquire small EFSS vendors to extend their portfolios. Important acquisitions are: Citrix acquired ShareFile, EMC acquired Syncplicity, Good Technology acquired Copiun and Acronis acquired GroupLogic. Other vendors, such as VMware, SAP and Symantec, have developed their own EFSS capabilities.

As this acquisition and development trend continues, EFSS capabilities will increasingly be standardized and become commodities. Eventually, a small number of IT vendors, most of whom are leaders in other markets, will lead in the EFSS market as well. In three to five years, the EFSS market will likely not be a separate market. EFSS capabilities will be absorbed by broader markets already mentioned, and the EFSS market will be subsumed.

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Market/Market Segment Description

The EFSS market refers to a range of in-house or cloud-based capabilities that allow mobile workers to:

- Synchronize and store documents, photos, videos and files from multiple endpoints into a cloud service or on a server
- Share files among multiple owned endpoints
- Share data among applications on a given device
- Share files with colleagues, partners and customers
- Access files securely on a server from a mobile device

The best products also ensure that files leaving the sharing location are encrypted and only readable by those authorized to access the data. EFSS offerings support smartphones and media tablets, as well as desktops and notebooks through native clients, file browsers or a Web browser. These capabilities are available as a service or as a product; in some cases, they store data in the cloud and offer collaboration features. On the client side, such services are supported through native applications, the file browser or the Web browser (see "Hype Cycle for Wireless Devices, Software and Services, 2012" and "IT Market Clock for Enterprise Mobility, 2012").

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Inclusion And Exclusion Criteria

Mandatory criteria dictate the inclusion or exclusion of a vendor from this MarketScope. Optional criteria have not been considered for inclusion or exclusion, but influence our evaluation of the vendor in the MarketScope ratings. For inclusion in the MarketScope for EFSS, we evaluate vendors based on:

1. **Revenue:** Vendors' annual revenue must be more than \$1.5 million from enterprise file sharing and synchronization products and services.
2. **References:** Vendors must provide, or Gartner must be aware of, at least three customer references that have deployed the service or product for at least six months; deployments must involve at least 100 users.
3. **Market focus:** Vendors must target the enterprise market (i.e., IT organizations) with cloud services or platforms to deliver private cloud services — to support business-to-employee (B2E) scenarios. In this research, we do not consider vendors that support business-to-consumer (B2C) scenarios exclusively.
4. **Product:** Vendors' offerings must have the following features and capabilities as part of the standard product. If the feature is provided by partners, it must be tightly integrated with the vendor's product and invisible to the end user. Features and capabilities, designated as mandatory or optional, are:
 - **iPad:** Support for the Apple iPad is mandatory; support for other media tablets is optional.
 - **Mobile device diversity:** Mandatory support, through a local application, for at least two of the following mobile OS platforms: iOS, Android, BlackBerry or Windows Phone. Support for Windows Mobile, Symbian and other niche platforms is optional.

- **PCs:** Support for Windows desktops and notebooks, either through file/Web browser plug-ins or stand-alone applications, is mandatory. Support for Mac OS or Linux platforms is optional.
- **Cloud-based service:** Availability as a service in public clouds, or software products enabling the creation of private clouds are optional. Hosted and on-premises delivery models are optional.
- **File synchronization:** Support for transparent and automatic data synchronization between the devices and the cloud service is mandatory. There also must be synchronization support for multiple devices connected to the service or system, for selected files or folders.
- **File sharing:** Support is required for multiple levels of mobile file sharing: (1) sharing among different devices belonging to the same person; (2) sharing files or data among different applications on the device; (3) file sharing with people inside and/or outside the organization. Basic features for sharing include choosing the sharing destination, inviting peers, emailing links to shared files, tracking file accesses, and restricting access rights to selected users or user groups.
- **File transfer:** Optimized file transfer with compression capabilities for large files is optional.
- **Collaboration:** Features that encourage collaboration between individuals (e.g., version control, change logs, comments, tasks and activity streams) are optional. Mobile access to collaboration platforms, such as SharePoint, is optional.
- **Integration:** Integration with storage systems or services, document repositories (such as Microsoft SharePoint), or business applications (such as those from salesforce.com) is optional. Availability of APIs and integration capabilities for application developers is optional.
- **Security:** Mandatory capabilities include user password authentication (requiring strong alphanumeric passwords), lockout after a given period of inactivity, remote wipe (native, or through enterprise application software [EAS] or MDM technology) and data encryption on transfer (with Secure Sockets Layer [SSL]). Optional features include data encryption at rest (files in the local folder), enhanced data encryption on transfer (e.g., AES-128), data loss prevention (restrictions to applications that can open, manipulate or send a file), digital rights management (DRM), policy enforcement (e.g., to restrict the access to cloud services to sanctioned devices), access tracking and reporting. Also optional are containerization of data at rest (possibly through partners, such as Good Technology); integration with Security Assertion Markup Language (SAML) for enhanced authentication and access control; and integration with enterprise-deployed public-key infrastructure (PKI) and certificate authorities infrastructure.
- **Certifications and compliance:** Availability of official certifications for selected regulations — e.g., Federal Information Processing Standard (FIPS) 140-2, Health Insurance Portability and Accountability Act (HIPAA), Sarbanes-Oxley Act (SOX) and payment card industry (PCI) compliance — is optional.
- **Secure deployment:** Availability of secure deployment options for cloud or host-based models, third-party evaluations of data centers or data center certifications (e.g., SSAE 16), VMware, Citrix XenServer and Microsoft HyperV appliance options deployed beyond the demilitarized zone (DMZ) is mandatory.
- **Management:** Integration with LDAP and Active Directories for authentication; group policies and centralized management tools that allow administrators to manage synchronization and control the content, access rights and user activity is mandatory. Integration with MDM platforms such as MobileIron is optional.
- **Terms and conditions:** Vendors must include in their contracts clear terms and conditions: (1) ownership of data (i.e., data must always belong to the enterprise) is mandatory, and (2) guaranteed uptime with penalty or credit in case of service outages, etc., is optional.

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Included Vendors

Based on our evaluation of the mandatory and optional criteria, vendors that qualified for inclusion in this MarketScope are:

- Accellion
- Acronis
- Box
- Citrix
- Egnyte
- EMC
- Good Technology
- Nomadesk

- Oxygen Cloud
- WatchDox
- YouSendIt

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Notable Absences

Vendors that bring EFSS offerings to the market but did not qualify for inclusion in this version of the EFSS MarketScope are:

- AirWatch, Fiberlink, Globo, MobileIron, TrendMicro SafeSync, Symantec and SAP (MDM vendors): Their products either do not provide native client for Windows PC or Mac, or have been in the market with the mandatory set of features for less than six months.
- Alfresco, Intralinks and OpenText (content management vendors): Their products either missed mandatory features, such as multiple mobile OS platform support or native client for Windows PC or Mac, or have been in the market for less than six months.
- Dropbox: Its product is aimed primarily at individuals and lacks mandatory security and management features for enterprises. Dropbox for Teams is for businesses, but did not have enough large deployments at the time of evaluation to qualify.
- Apple (iCloud), Microsoft (SkyDrive) and Google (GDrive): They are aimed primarily at individuals and lack mandatory enterprise security and management features. Microsoft SkyDrive Pro was not available in a production version at the time of preparing this report.
- Funambol: This open-source vendor does not offer support for enterprise users or track installations, so could not provide customer references.
- ownCloud: This open-source vendor did not meet the revenue threshold of \$1.5 million in revenue for the past 12 months.
- VMware and Cortado (client virtualization vendors): Their products have been in the market with the mandatory set of features for less than six months, or did not meet the revenue threshold of \$1.5 million for the past 12 months for their EFSS businesses.
- Mezeo Software, Cisco Systems, SugarSync and SkyDox: They did not meet the revenue threshold of \$1.5 million for the past 12 months for their EFSS business.
- Mozy (EMC): It focuses on backup and file synchronization, but does not support sharing capabilities.
- Druva: It focuses on backup services, but its file sharing module was not in the market for more than six months at the time of evaluation.
- Globo: It does not support automatic file sharing (i.e., transparent and automatic data synchronization between the devices and the cloud service); and did not meet the revenue threshold of \$1.5 million in revenue for the past 12 months for its EFSS business.
- Huddle: Its native client for Windows PC or Mac was available in beta in 3Q12, the mandatory set of features for less than six months.

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Rating for Overall Market/Market Segment

Overall Market Rating: Promising

File synchronization and sharing is a critical capability for mobile workforces whose organizations have ongoing mobility initiatives with media tablets and BYOD programs. We expect IT organizations will face increasing demand for these capabilities, with deeper focus on security and compliance by regulated or security-conscious enterprises. Despite the market growth in less than 24 months, many products are already mature.

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Evaluation Criteria

Table 1. Evaluation Criteria

Evaluation Criteria	Comment	Weighting
Overall Viability (Business Unit, Financial, Strategy, Organization)	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 and offering the product, and will advance the state of the art within the organization's portfolio of products.	High
Product/Service	Core goods and services offered by the vendor that compete in/serve the	Standard

	defined market. This includes current product/service capabilities, quality, feature sets and skills, whether offered natively or through OEM agreements/partnerships according to the market definition and inclusion criteria above.	
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.	Standard
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 or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, SLAs and so on.	High
Marketing Strategy	A clear, differentiated set of messages consistently communicated enterprisewide and externalized through the website, advertising, customer programs and positioning statements.	Standard
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.	High
Innovation	Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.	Standard

Source: Gartner (February 2013)

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Figure 3. MarketScope for Enterprise File and Synchronization Sharing

	RATING				
	Strong Negative	Caution	Promising	Positive	Strong Positive
Accellion					X
Acronis				X	
Box					X
Citrix					X
Egnyte			X		
EMC				X	
Good Technology				X	
Nomadesk		X			
Oxygen Cloud			X		
WatchDox				X	
YouSendIt				X	

As of 12 February 2013

Source: Gartner (February 2013)

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Vendor Product/Service Analysis

Accellion

Accellion (www.accellion.com) is a private company based in Palo Alto, California. Founded in 1999, it operates internationally, with offices in London and Singapore, and is a market leader in traditional file sharing and managed file transfer solutions. Since 2010, Accellion has grown its visibility and track record as a mobile file synchronization and sharing player, particularly for midsize to large regulated and/or security-conscious organizations. Accellion Secure Mobile File Sharing solutions are available on-premises, as well as through the public and private cloud. Accellion provides a range of capabilities across file synchronization and sharing, mobile access, collaboration, security and compliance, certifications, back-end integration and archival material.

Strengths

- With significant revenue, size and international presence, Accellion is a mature organization with strong viability and ability to execute in a market that is still in the early stages, characterized by many small players. Accellion is often included in shortlists by regulated organizations, such as healthcare, government, oil and gas, utilities and financial services.
- Accellion's Secure Mobile File Sharing solutions offer security capabilities such as device data encryption; multi-LDAP/application development (AD) integration and SAML integration for single sign-on authentication; FIPS 140-2 Level 1 security; and encrypted container for mobile

file sharing on the device with data leakage prevention. Compliance certifications for HIPAA, SOX, PCI and Federal Information Security Management Act (FISMA). Collaboration capabilities include secure file sharing for project teams (e.g., track file versions, comments), virtual data rooms and deal rooms, as well as mobile access to SharePoint files from mobile devices, and file shares with external users, through Kitepoint.

- We heard great customer feedback on implementation, flexibility to meet customer needs, integration with third parties, client support and interactions. There is significant presence in regulated sectors, such as healthcare, because of the level of certifications and compliance support.

Cautions

- Acellion's products for mobile file sharing and synchronization do not yet support Windows Phone 7 or Windows 8, or HTML5. Collaboration capabilities do not include the "like" for activities in shared workspaces.
- While security features are available to protect data at rest on the device, Acellion's mobile management and policy enforcement is limited. Enhanced management and policy enforcement are available through integration with Good Technology, MobileIron, Boxtone and Mokana. However, IT organizations require two separate investments: one for EFSS and another for MDM.
- Growing competition comes from enterprise vendors from neighbor markets, such as MDM, collaboration and storage, which are expanding their capabilities in mobile file sharing and synchronization, and offer integrated capabilities in a single platform or service. A single investment from a single supplier may increasingly be seen as a priority by many organizations that aim at rationalizing mobility investments and complexity.

Rating: *Strong Positive*

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Acronis

Acronis (www.acronis.com) is a private company based in Woburn, Massachusetts. Founded in 2002, it is a provider of enterprise backup/recovery software (see "Magic Quadrant for Enterprise Backup/Recovery Software"). Acronis acquired GroupLogic (www.grouplogic.com) in September 2012. A player in traditional file sharing and managed file transfer solutions, in 2011 GroupLogic launched its mobile and file sharing solutions activeEcho and mobilEcho. These software products can be installed by customers on-premises or in a private cloud (e.g., Amazon Web Services [AWS] EC2) and support hybrid architectures with existing storage locations. They provide file synchronization and sharing, security and compliance, certifications, collaboration capabilities.

Strengths

- There is strong security support with authentication, data encryption at rest, remote wipe, containerization and policy enforcement. Acronis is relatively popular with highly regulated organizations, because process visibility, logging and auditing are supported. Rich mobile client experience features PDF preview and annotation within the container.
- Acronis has a strong focus on enterprise markets, with over 20 years of experience and 7,000 enterprise customers worldwide. Most of the installed base is in regulated sectors, such as financial services, healthcare, pharmaceuticals, legal, energy and government. It also is active in K-12 and higher education sectors, with a focus on media tablets' support.
- Great customer feedback pointed to easy installation, integration with existing infrastructure, responsiveness and user support.

Cautions

- Although a relatively small organization with recent mobile product extensions, the company has operated successfully for over a decade in the managed file transfer market. Acronis is a larger and more profitable organization than GroupLogic, which it acquired. This should help GroupLogic operate as a bigger company.
- Acronis is missing support for BlackBerry and Windows Phone, has limited capabilities on PC/Mac clients, and HTML5 is not yet supported. Although its products can be deployed in a private cloud, the company does not sell as-a-service offerings in the public cloud.
- GroupLogic is a U.S.-centric organization with U.S. operations only, despite its network of worldwide channels and distributors. The acquisition of GroupLogic will help Acronis build an international presence and channel infrastructure.

Rating: *Positive*

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Box

Box (www.box.com) is a startup company based in Los Altos, California. Founded in 2006, Box

received \$280 million in funding from venture capitalist firms such as Draper Fisher Jurvetson (DFJ), Andreessen Horowitz and Scale Venture Partners, as well as strategic investments from SAP, salesforce.com and General Atlantic. With 15 million registered users, Box provides secure cloud content management and collaboration services, as freemium and premium services. Because of its pure cloud-based model, enterprise and security focus, Box has gained wide attention as an alternative to Dropbox for enterprise adoption. Box combines simplicity and usability with enterprise-specific features. Box positions itself as the enterprise-class content collaboration platform for a wide variety of cloud-based partner services in an attempt to break out of the narrow file sync and share market.

Strengths

- Although it's a startup, the company has grown its revenue, staff and office locations quickly during the past 24 months. Its presence in the enterprise market is growing too, with most Fortune 500 organizations in the U.S. and many others outside the U.S.
- Reference users and Gartner inquiries indicate that Box has achieved a good balance between enterprise support and end-user usability.
- Through a rich integration API, Box has created an extensive ecosystem of partners that add value by building on the Box platform to integrate with other services or provide specific functionality.

Cautions

- It only has a pure cloud service offering, including storage of EFSS files. There is no support for hybrid architectures, with data storage kept on customers' premises; in the case of integration with enterprise data repositories, such as SharePoint, files are replicated in Box in the cloud.
- Specific use cases, such as document management and virtual data rooms, are supported, but advanced collaboration functionality that demanding users or situations will require is not covered.
- Box has accepted a relatively large amount of venture capital, leading to high expectations and pressure. It will need extraordinary performance to meet these expectations.

Rating: *Strong Positive*

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Citrix

Citrix (www.citrix.com) is a public company based in Fort Lauderdale, Florida. Founded in 1989, Citrix has more than 8,000 employees and operates globally; its annual revenue in 2011 was \$2.21 billion. In October 2011, Citrix acquired ShareFile and formed a data sharing division. Citrix ShareFile is a hybrid solution, with synchronization and sharing capabilities provided as a service, while corporate data storage can be kept on-premises or in the cloud. Citrix ShareFile's StorageZones can support corporate data storage on-premises, within customers' private cloud, and in Citrix ShareFile-managed cloud storage, or a hybrid of the two — adapting to specific compliance and performance requirements. In January 2013, Citrix closed the acquisition of Zenprise and renamed the mobile product offering as XenMobile.

Strengths

- Citrix is a mature company with positive financial results and strong corporate viability. ShareFile was profitable before the acquisition. Citrix ShareFile is a key component of the broader company's personal cloud strategy ("follow me") and is now integrated with other Citrix offerings, such as Citrix Receiver, Citrix XenDesktop, Citrix XenMobile and Citrix Podio.
- Citrix ShareFile offers capabilities for mobile file synchronization, sharing, transfer and access, including integration with Microsoft Outlook; security, management and compliance capabilities (e.g., compliance with PCI, HIPAA/Health Information Technology for Economic and Clinical Health [HITECH]); access to internal network shares, sync tool optimized for virtual desktops; and integration with Citrix Receiver for secure, policy-controlled delivery to PCs and smart devices.
- Great customer feedback focused on quality of service and up time, responsiveness, support and ease of installation. Pricing per user per month services is competitive. ShareFile has a strong track record in the market, particularly with regulated and/or security-conscious organizations aiming to enable secure mobile access to corporate files.

Cautions

- While available as a hybrid solution for mobile file synchronization and sharing, with the option to keep corporate data storage on-premises, Citrix ShareFile is not available as exclusive on-premises. The Citrix ShareFile solution is not the answer for organizations that require on-premises infrastructure deployments.
- Citrix ShareFile support for collaboration is limited, not offering a complete collaborative workspace to teams. Working together on a file requires the user to upload/download a copy of the file on the client. File metadata, such as status, is not supported. SharePoint integration is

not yet supported. Enhanced security features such as FIPS140-2 certifications are missing. Some of these capabilities can be added through other Citrix products, Podio and XenMobile.

- Despite great feedback on overall experience, some customer references outside the U.S. indicate lack of local support and the disadvantage of calling U.S. support from different time zones.

Rating: *Strong Positive*

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Egnyte

Egnyte (www.egnyte.com) is a startup company based in Mountain View, California. Founded in 2008, Egnyte has received \$32 million in funding from Kleiner Perkins Caufield and Byers, Floodgate, Polaris Venture Partners and Google Ventures. Egnyte offers a hybrid architecture that combines local server storage with a shared repository in the cloud. The software continuously synchronizes data from behind the firewall with the cloud, and with users' and partners' devices and desktops.

Strengths

- Egnyte offers deeper support for storage area networks than many of the other products mentioned in this MarketScope, allowing access to large on-premises repositories from mobile and other devices.
- Numerous integrations are available with storage, security, office application and mobility vendors' applications.
- Egnyte concentrates on enterprise requirements, with no consumer offerings, and specific functionality for large deployments.

Cautions

- Egnyte addresses a wide list of specific use cases like backup, file transfer, disaster recovery, compliance and vertical industry applications, but does not include some advanced functionality that demanding users or situations will require in all these areas.
- The architecture of Egnyte does not allow content to stay behind users' firewalls (all content is synched to the cloud). The term hybrid often indicates this type of use case, but does not apply to Egnyte.
- Some references report dissatisfaction with the product's user experience. After our survey, Egnyte released an overhauled UI.

Rating: *Promising*

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EMC

EMC (www.emc.com) is a public company based in Hopkinton, Massachusetts, and founded in 1979. In 2012, it acquired Syncplicity, a company based in Menlo Park, California, and operating since 2008. Syncplicity has specialized in file distribution, backup, synchronization and sharing. Syncplicity focuses on enterprise needs and implements a hybrid approach, with files kept in their original locations, while secure access, synchronization, sharing and distribution are available as a service. Syncplicity's cloud platform integrates with EMC Documentum and has native clients for Windows, Mac, iOS and Android devices. Integration with EMC Isilon and Atmos storage products has been announced for availability in 1Q13.

Strengths

- Automatic synchronization of any files, from any folders on a user's hard disk, is supported. This approach is different from other products that only synchronize files from a specially created folder on the PC.
- Extensive support for enterprise security and management includes SAML single sign-on, two-factor authentication, data encryption at rest, automatic remote wipe or unshare.
- Syncplicity offers multiple data centers and geographic distribution options based on AWS servers.

Cautions

- While Syncplicity addresses backup use cases, the full range of functionality that enterprises require for backup is not supported; in particular, it does not integrate with EMC backup products.
- Native application for BlackBerry and Windows Phone platform is missing. HTML5 is not supported yet.
- Collaboration capabilities — such as voting, comments, recommendations, tasks or annotations, as well as SharePoint integration — were not supported at the time of evaluation. While not

mandatory, these capabilities are closely related to file sharing that users value and that several competitors offer.

Rating: Positive

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Good Technology

Good Technology (www.good.com) is a private company based in Sunnyvale, California. Founded in 1996, Good received \$95 million in funding from Oak Investment Partners, DFJ, Meritech Capital Partners, DFJ ePlanet Ventures, DFJ Growth Fund, Rustic Canyon Ventures, Allegis Capital, GKM and Blueprint Ventures. Good Technology is a market leader and key innovator in the mobile device management market, plus a veteran of secure enterprise mobility and containerization. Over the last 24 months, Good Technology's customer base and market presence grew in North America, Western Europe, Asia/Pacific, and in regulated sectors such as financial services, insurance, professional services, government, military and defense. An aggressive player in pursuing new mobility opportunities against competition, Good Technology, in 2012, acquired Copiun, a small company (based in Marlborough, Massachusetts) focusing on secure EFSS. Copiun products are now sold by Good Technology as part of the Good Share offering. In line with Good Technology's focus on regulated organizations, Good Share is delivered on-premises only.

Strengths

- Good Share provides secure file synchronization and sharing capabilities as a component of Good's mobile suite that encompasses mobile device management, mobile application management, mobile collaboration and mobile application development. This offering includes a range of capabilities to implement mobile consumer devices and BYOD strategies, spanning devices, applications and content within a single environment and console.
- Strong management and security capabilities include corporate container with data leakage prevention, certified FIPS-140-2 encryption and other compliance features.
- Global presence and local support is available in 14 countries outside the U.S.

Cautions

- Support for BlackBerry is missing. Support for Windows Phone is missing, but likely will be made available in future releases.
- Support for collaboration capabilities is very limited in Copiun's product, but Good Technology is adding capabilities through integration with Good Messaging, Collaboration and Dynamics.
- Copiun's customer reference feedback pointed to limited maturity of the platform and the vendor. Since the acquisition, Good Technology has been actively integrating Copiun with its product, and will focus further efforts on improving performances of browsing and download, and integration with security components such as Kerberos. This process may require another three to six months to complete.

Rating: Positive

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Nomadesk

Nomadesk (www.nomadesk.com) is a private company headquartered in Ghent, Belgium. Founded in 2004, Nomadesk received \$11.3 million in funding from venture capital firms such as Gimv and Nausicaa Ventures. Nomadesk is a niche player providing file synchronization and sharing capabilities with security to the business professional services market. It leverages strategic partnerships with ISPs, carriers and software vendors to expand its market reach. Nomadesk's offerings are available in public or private cloud modality. Nomadesk provides a portal for partners to sell directly from the hosted Nomadesk platform without infrastructure investments, and the solution can be white-labeled.

Strengths

- Nomadesk is increasing its international presence through a partner program that involves several distribution and licensing agreements, of which 60 global partners cover Asia, Europe, the U.S. and Latin America.
- Pricing is reported as convenient, being less expensive than many competitors.
- Nomadesk's Theftguard feature remotely wipes files from the local drive on notebooks and PCs. Security support includes password protection, 256-bit encrypted locally and in transit.

Cautions

- It is a small company, with limited size and staff, minor visibility in the market and a limited customer base.
- Security and management features are basic, missing remote wipe for mobile devices, data loss

prevention (DLP) and certifications. Collaboration features beyond file versions and track changes are missing as well.

- Feedback for customer references mention immaturity of the tools and the support — and reinforce the impression of niche and immature players in the broader market.

Rating: Caution

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Oxygen Cloud

Oxygen Cloud (www.oxygencloud.com) is a private startup company based in Redwood City, California. Founded in 2010, Oxygen Cloud's offerings take a hybrid approach that combines cloud deployment for administration and authorization with support for local on-premises storage for content and directory information to bridge the cloud and on-premises worlds. It promises the reach and manageability of the cloud with the control of on-premises deployments. It focuses on users who need access to existing corporate data storage networks.

Strengths

- Oxygen Cloud's hybrid approach means that it does not need access to users' directory information or content. This information, as well as sharing and synchronization of files, does not need to be stored in the cloud.
- The company supports a wide variety of cloud and local storage vendors, including Amazon, EMC, IBM, AT&T and Nirvanix.
- The company offers optimized support for network speed, management of large numbers of users, auditing and access to existing data stores.

Cautions

- Oxygen Cloud is a relatively small player with limited visibility and operations in the U.S. only. However, it has a joint venture with Nissho Electronics in Japan and with resellers in other regions.
- Designing and managing hybrid deployments using local storage networks is necessarily more complex than pure cloud configurations. Users looking for simple file sync and share capabilities might find it more complex than necessary.
- Oxygen Cloud does not currently support collaboration features such as comments, recommendations, tasks or annotations.

Rating: Promising

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WatchDox

WatchDox (www.watchdox.com) is a private startup company based in Palo Alto, California, with offices in Israel and the U.K. Founded in 2008, WatchDox has raised \$35 million in venture capital. Due to rich security and collaboration capabilities, WatchDox has a growing presence in the enterprise market. WatchDox's offering is available as a service in public clouds (based on AWS), in virtual private cloud and on-premises through a virtual appliance. It can be integrated with corporate applications through APIs.

Strengths

- Strong security capabilities include data encryption at rest on the device; multi-LDAP/AD integration and SAML integration for single sign-on authentication; encrypted container on the device with policy enforcement; hardware security module (HSM) with exclusive access and control of encryption keys. It also facilitates compliance with healthcare HIPAA/HITECH and consumer financial information Gramm-Leach-Bliley Act (GLBA). The organization is certified by TRUSTe as compliant with Safe Harbor and the EU Protection Directive.
- Secure collaboration capabilities are available for internal and external users (e.g., suppliers), including shared workspaces and virtual data rooms, with document versioning, annotations and comments. Integration with SharePoint and Exchange is supported.
- Relevant customers' track records are with large deployments within security-sensitive and regulated organizations (e.g., in financial services and healthcare, or highly collaborative workplaces, such as life sciences, manufacturing and media/entertainment).

Cautions

- WatchDox products for mobile file sharing and synchronization do not yet support FIPS140-2 encryption certification, although the certification process with Science Applications International Corp. (SAIC) is ongoing.
- Collaboration support does not include the like for activities in shared workspaces; some capabilities, such as track changes, post comments and uploads, are not equally supported

across different client platforms.

- Company business is still mostly in North America, although the company now has offices in the U.K., France, Italy, Germany and Israel, and is growing a network of channels elsewhere. Local support outside North America is still limited and may vary a lot from country to country.

Rating: Positive

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YouSendIt

YouSendIt (www.yousendit.com) is a private startup company based in Campbell, California. Founded in 2004, YouSendIt received \$48.9 million in funding from venture capital firms Adams Street Partners, Alloy Ventures, Emergence Capital Partners, Sevin Rosen Funds and Sigma Partners. YouSendIt started as a service to send large attachments that exceed the limits set on most email systems. In 2012, it launched its enterprise offering, YouSendIt for Business, including file sync and share, in addition to the original large file transfer services. With more than 37 million registered users, of which about 620,000 are paid subscribers, YouSendIt provides file synchronization and sharing, as well as a content collaboration suite of services that enable users to securely share content, sign documents, and access files from any mobile device or PC. It supports mobile users inside and outside the organization, with security, policy enforcement, administrative controls to manage the flow of work across the entire extended enterprise.

Strengths

- The company gained good market awareness through its original file transfer service, which is integrated into YouSendIt for Business. The installed base is growing in the enterprise market, particularly in Fortune 500 organizations.
- YouSendIt offers a digital signature function that allows recipients to sign contracts and other documents sent to them without having to send or fax physical documents.
- It has significant revenue, size and international presence, with a strong ability to execute in a still early stage market characterized by many small players.

Cautions

- The company's name and history associate it with the file transfer market, rather than file sync and share. The Workstream brand has not caught on and has been replaced by YouSendIt for Business.
- Although YouSendIt for Business includes extensive capabilities to send and share files, it lacks social collaboration capabilities such as comments, ratings, tasks and likes, as well as deep back-end integration with SharePoint and other collaboration and content management platforms.
- Customer feedback indicates that YouSendIt pricing for collaboration capabilities is too high, with a rigid approach since it forces any user licenses to upgrade, not only those that need collaboration.

Rating: Positive

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