

Ovum Decision Matrix: Selecting an Enterprise File Sync and Share Product, 2014–15

Excerpt prepared for
Egnyte, Inc.

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Summary

Catalyst

Ovum's 2014 global study of 5,187 full-time employees indicates that 89% of those using file sync and share technology at work are using at least one consumer product, and 29% are using three or more consumer and/or commercial products. Only 9% of file sync and share users are satisfied with a single commercial product, and 44% of employees are not using file sync and share products at all, relying on other methods such as email attachments to move documents around the business and their mobile devices. These figures paint an anarchic picture of file sharing and document-centric collaboration within the workplace, and support Ovum's thesis that while there may be an enterprise file sync and share solution to address almost every business need, there is no product that meets them all.

Methodology

Technology assessment

In this assessment dimension, Ovum considers a series of data points that identify features of note and areas of product differentiation within the enterprise file sync and share market. Essentially, it is an assessment of end-user product functionality. Vendors were asked to complete Ovum's Enterprise File Sync and Share Features Matrix, which comprises 241 product functionality data collection points divided into eight distinct categories. The more data collection points a category has the more differentiation among products there is in this area. The categories are as follows:

- **File synchronization features**
- **File sharing features**
- **Collaboration features**
- **Content management features**
- **Search features**
- **Social features**
- **Desktop features**
- **Mobile features**

Execution

In this dimension, Ovum considers a series of data points for features and functions that are important to CIOs, IT departments, and those with information systems / information management (IS/IM) responsibilities. Essentially, it is an assessment of "enterprise fit" and the ability to execute a successful rollout of the product. Vendors were asked to complete Ovum's Enterprise File Sync and Share Features Matrix, which comprises 194 "enterprise fit" data collection points divided into eight categories. The more data collection points a category has the more differentiation among products there is in this area. The categories are as follows:

- **Deployment features**
- **Administration features**
- **Information security management features**
- **Governance, risk, and compliance features**
- **Systems integration features**
- **Licensing features.**
- **Developer features**
- **Management reporting features**

Market impact

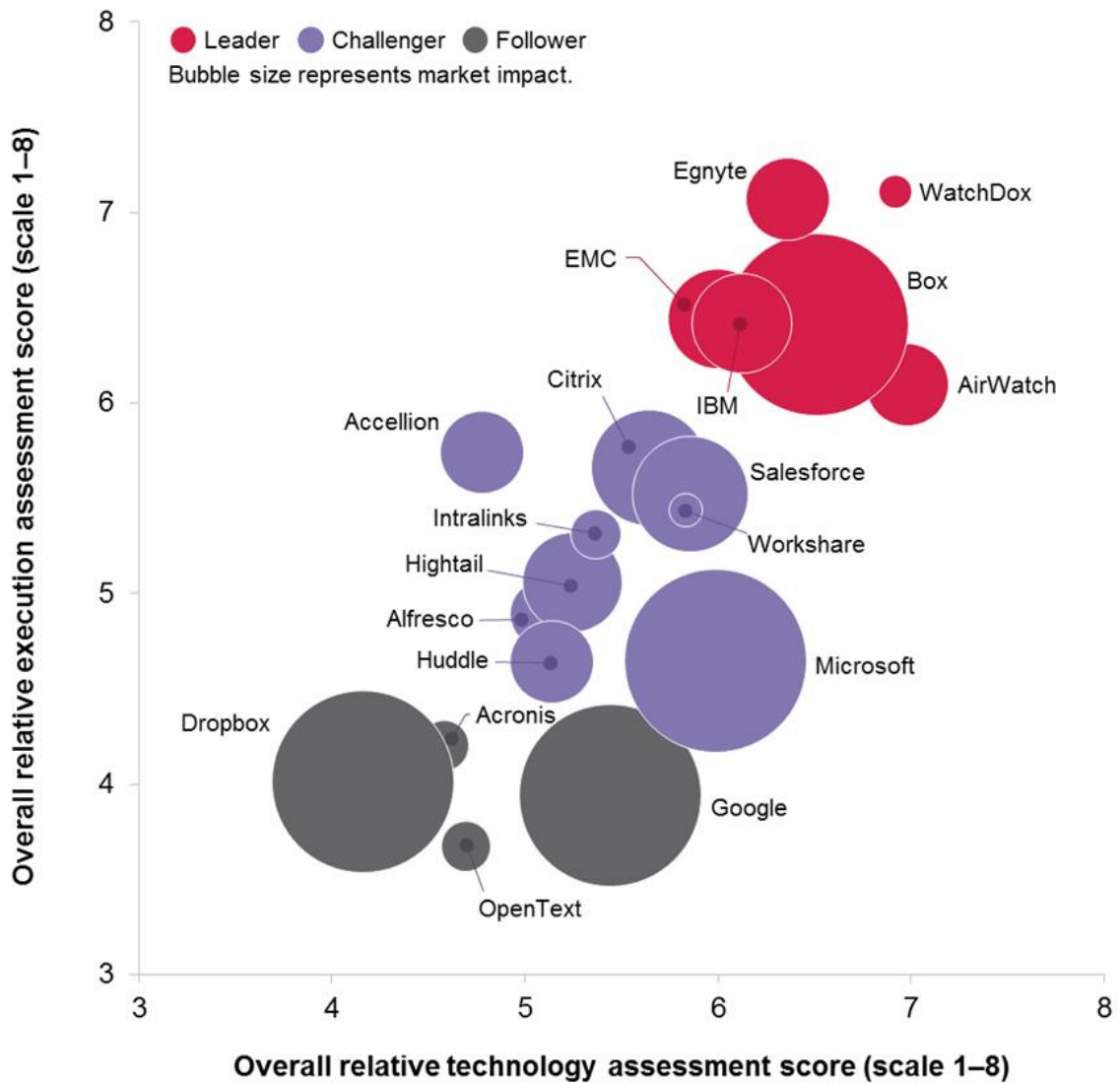
In this dimension, Ovum considers the global market impact of a product based on six market indicators. This is the most challenging dimension to ascertain, as vendors continue to play their cards close to their chest, only sharing glimpses of business performance and sales data when it complements and supports their marketing message. As the market matures, Ovum expects market impact data to become more revealing. The six categories relating to market impact are:

- **Revenue**
- **Market competitiveness**
- **Customer deployments**
- **Geographical penetration**
- **Vertical industry penetration**
- **Market segment focus**

Ovum ratings

- **Market leaders:** This category is reserved for enterprise file sync and share products that score significantly above the combined group average. The primary metrics considered are those derived from assessing product functionality and enterprise fit as described above. Vendors appearing on this list do so based on Ovum's weightings and general market assumptions. Organizations evaluating the enterprise file sync and share market should pay particular attention to vendors in this category.
- **Market challengers:** This category is reserved for enterprise file sync and share products that score on or around the combined group average. The primary metrics considered are those derived from an assessment of product functionality and enterprise fit as described above. Ovum recognizes the significance of market impact, but it is given less weighting as it is not an easily verifiable measure.
- **Market followers:** This category is reserved for enterprise file sync and share products that generally score below the combined group average. All dimensions and their constituent categories are included. Vendors appearing on this list do so based on Ovum's weightings and general market assumptions. Businesses and institutions evaluating the enterprise file sync and share market should consider the market and product strategies of the vendors listed in this category, as they may well align with the business and technical strategies of the organization.

Figure 1: Ovum Decision Matrix: Enterprise File Sync and Share, 2014



Source: Ovum

Table 1: Enterprise File Sync and Share: market leaders, challengers, and followers

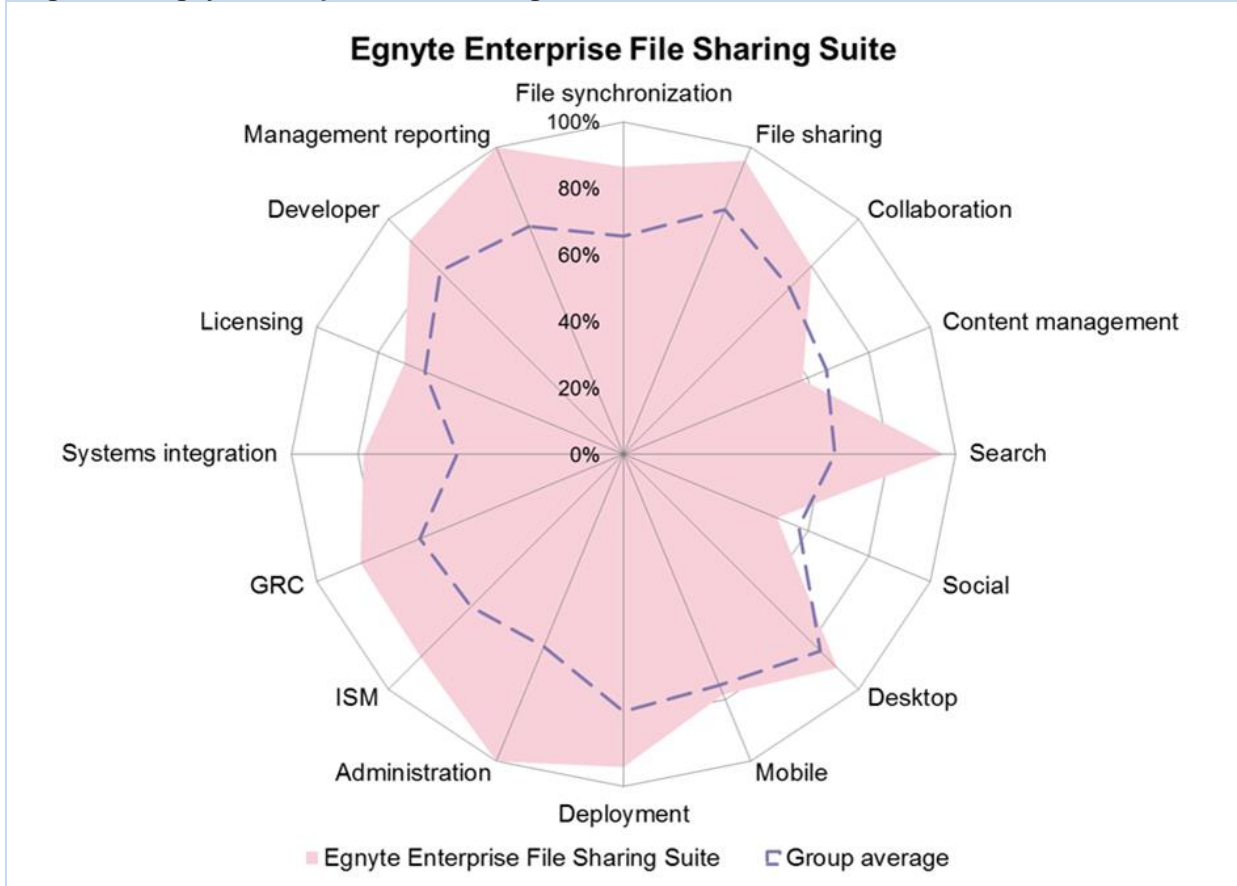
Market leaders	Market challengers	Market followers
AirWatch (by VMware) Secure Content Locker	Accellion Kitemworks	Acronis Access
Box Enterprise Edition	Alfresco One	Dropbox for Business
Egnyte Enterprise File Sharing Suite	Citrix ShareFile	Google Drive for Work
EMC Syncplicity	Hightail for Enterprise	OpenText Tempo Box
IBM Connections and IBM SmartCloud Connections	Huddle	
WatchDox	Intralinks VIA	
	Microsoft OneDrive for Business	
	Salesforce Files	

	Workshare Connect	
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Source: Ovum

Egnyte Enterprise File Sharing Suite – Ovum Decision Matrix: market leader

Figure 13: Egnyte Enterprise File Sharing Suite



Source: Ovum

Strengths

Egnyte’s file sharing, synchronization, and search features are among best-in-class – Egnyte synchronizes files across laptops, desktops, mobile devices and enterprise storage. Egnyte can sync specific sub-folders to smartphones, tablets, and traditional computers, and it offers high levels of scalability and performance. The product brings native device controls and remote-wipe features to enterprise administrators, but importantly removes only corporate data held on end-user devices.

Egnyte caters to the needs of administrators, compliance officers, and IT infrastructure managers – As a single solution, Egnyte provides a range of storage administration features that address the scenarios necessary to deliver maximum enterprise flexibility. Egnyte provides IT departments with a choice of authentication options, and a centralized "Device Control" dashboard enables administrators to easily view and wipe (if necessary) corporate data from end-user computers and devices. Files can be hosted in the cloud or on-premise based on information privacy needs. Files can also be restricted to specific geographies.

Opportunities

Egnyte's hybrid deployment capabilities are a good match for the European market – The lion's share of Egnyte's business is currently in the US, but the company's commitment to the European market with a local data center has enabled it to bring on board a significant stream of new customers. Egnyte's hybrid model is particularly attractive to companies located in Germany and Switzerland that do not want to store any of their data in the cloud, so Ovum would expect this to increase the business opportunity in this region.

Infrastructure-as-a-service platforms present an interesting commercial opportunity for Egnyte – Egnyte is not a big company compared to some vendors in the enterprise file and sync market, so partnerships and an expanding ecosystem are important. Google and Seagate are investors, and Egnyte has a technology partnership with NetApp, so Ovum holds a positive view about the company's future. In addition, the ability to run Egnyte on infrastructure-as-a-service platforms could increase the potential of the product, especially with OEMs and carriers, by enabling them to develop new business models or monetize existing infrastructure investments.

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