Ovum Decision Matrix: Selecting an Enterprise File Sync and Share Product

Summary

Catalyst

The enterprise file sync and share market has truly come of age, with products and solutions available to address a broad set of business requirements, user expectations, and IT constraints. However, the selection of any enterprise communication, collaboration, or productivity solution generally requires a degree of compromise and the practical realization that no single product can ever meet every business scenario. This report, in conjunction with the *Ovum Interactive Decision Matrix for Enterprise File Sync and Share*, provides enterprise decision-makers with the information they need to understand and gain insight into a market that is comprised of products that generally compete, but also complement and extend one another.

Ovum view

The workforce needs to access all relevant documents, files, and information via any screen, from any location, at any time. These screens may be personal devices, so IT departments need to ensure that information security and data privacy policies are observed and enforced. Meanwhile, business managers are tasked with increasing productivity, reducing operational costs, and promoting business growth. These demands can produce contention within the workplace as employees try to get work done in an enterprise IT environment that wants to control workplace tools and utilities.

Empowered employees also want to share and interact with documents and files across their organizations and with external communities, be it partners or customers. Moreover, they want to do this within the context of business applications and processes. Early adopters of enterprise file sync and share are already going beyond personal drive replacement functionality, as organizations re-architect their IT environments to take full advantage of cloud services and new models of working.

New challenges and concerns arise with the adoption of every new technology. In the case of file sync and share, this is seen in the balancing act that seeks to satisfy both the needs and expectations of the business user and the needs and expectations of the IT department. It is the role of the IT decision-maker to achieve this balance, with "just enough" functionality to meet business requirements, and with a budget that is seldom enough.

The Ovum Decision Matrix for Enterprise File Sync and Share presents 10 well-balanced products, each offering a different mix of features, functions, reach, and range. No single product scored 10 out of 10 in Ovum's assessment, and every product has its strengths and weaknesses. Products from Box, Egnyte, and Microsoft stand out in Ovum's general assessment, but organizations should apply their own selection criteria when shortlisting solutions for full evaluation.

Key findings

- Box, Egnyte, and Microsoft offer the strongest combination of end-user and IT management features based on Ovum's general assessment criteria.
- Box Enterprise, Egnyte Connect, and Microsoft OneDrive for Business are three very different products, each offering different combinations of features and functions.
- Products from Citrix, Dropbox, Google, IBM, Syncplicity, and VMware occupy the "challenger" category of the enterprise file sync and share market.

- For those small and medium-sized organizations looking to business continuity, base functionality, managed services, and reduced cost of end-user support, a product such as SecuriSync hits the spot.

- Box is the cloud-native vendor, tackling the challenge of modern content management from a totally new perspective.

- Microsoft is the incumbent provider, transitioning from on-premise software to cloud services.

- Egnyte represents the storage-agnostic vendor, trying to unite old and new content management strategies for mainstream and niche requirements.

- EU organizations and their business partners are preparing to comply with new data protection regulations, with data protection officers implementing governance systems for the management of the controls protecting data.

- Large enterprises, or organizations with diverse business operations, are unlikely to find a single file sync and share solution that addresses all business use cases, making a mix of two or three products highly likely.

- Only a handful of vendors can address the very real business need for on-premise, cloud, and hybrid deployments, as this requires a deep understanding of enterprise IT infrastructure as well as cloud-native operations.

Vendor solution selection

Inclusion criteria

Enterprise file sync and share is a general product term used to describe offerings that enable the storage of, and access to, electronic documents, files, and folders from a range of devices and interfaces. These products enable a selection of files stored on the user's desktop computer or mobile device to be synchronized to an on-premise or cloud-based content store, and thereafter to be accessed on other devices either on demand or via synchronization. These files and folders can be shared with colleagues, partners, and other parties through links or other mechanisms. Additional features extend file sync and share functionality to enterprise content management systems, line-of-business applications, and collaboration environments. Enterprise file sync and share products differ from consumer alternatives by providing additional administration, audit, and security features. The primary reasons for inclusion are as follows:

- **The product identifies with the enterprise file sync and share market**: The product must exhibit file sync and share functionality and offer a significant range of ancillary features as described in the Methodology section of this report.

- **The product is relevant to Ovum's enterprise clients**: The product must feature in Ovum client enquiries, advisory sessions, information requests, workshops, and events.

- **The vendor or product is established in the market**: The product must have been generally available for 36 months and/or have a substantial base of business users.

Exclusion criteria

The enterprise file sync and share market continues to mature and consolidate. A few mergers, acquisitions, and spin-offs have taken place over the past 24 months, and some vendors are realigning and redefining their product strategies in response to market and economic forces. File sync and share capabilities are being added to all manner of products and solutions, but it would be inappropriate to include these offerings in this report. The primary reasons for exclusion from this report are as follows:

- **The vendor did not wish to participate in the report:** Vendors, for various reasons, do not always want to engage in analyst reports, especially if the emphasis of the report does not align with their product strategy or company direction.
- **The product has file sync and share features, but these are not central to the offering:** A range of vendors have added "file sync and share" features to their offerings, but this functionality is not generally offered as a standalone commercial product.
- **The product is new to the market and is not yet commercially proven:** Product innovation and "feature annexation" are commonplace within the enterprise collaboration software market, hence new products are emerging all the time. Ovum's *On the Radar* reports provide an assessment of these products and an insight into their business value potential.

Methodology

Product assessment: Business-user features

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 235 end-user 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 information collected through the Features Matrix can be explored and analyzed using the *Ovum Interactive Decision Matrix*, a standalone data tool available to Ovum clients and subscribers. The categories are as follows:

- **File synchronization features:** The product's core abilities to synchronize files and folders between devices and repositories (46 data points).
- **File sharing features:** The product's core abilities as a content distribution and collaboration platform (28 data points).
- **Collaboration features:** The product's ancillary collaboration features and the extent to which the offering helps users to work with others (22 data points).
- **Content management features:** The product's level of integration with, and enhancement of, existing enterprise file and document management infrastructure (22 data points).
- **Search features:** The product's ability to help users find their documents and those created by others (38 data points).
- **Social features:** The extent to which the product embraces and promotes business social interaction and enterprise networks (27 data points).

- **Desktop features:** The extent to which the product enhances the purpose and usefulness of computers running Microsoft Windows or Apple OS X (16 data points).
- **Mobile features:** The extent to which the product enhances the purpose and usefulness of mobile devices, such as smartphones and tablets (36 data points).

Product assessment: IT management features

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 implementation of the product. Vendors were asked to complete Ovum's Enterprise File Sync and Share Features Matrix, which comprises 193 IT management 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 information collected through the Features Matrix can be explored and analyzed using the *Ovum Interactive Decision Matrix*, a standalone data tool available to Ovum clients and subscribers. The categories are as follows:

- **Deployment features:** Assesses the product's on-premise, cloud, and hybrid deployment options; regional presence; and directory integration facilities (23 data points).
- **Administration features:** Assesses the degree to which enterprise administrators can control aspects of the product and the way it is used (65 data points).
- **Information security management features:** Assesses the degree to which the product can address matters relating to the confidentiality, integrity, and availability of corporate files and data (22 data points).
- **Governance, risk, and compliance features:** Assesses the extent to which the product can help organizations address government and industry regulations (12 data points).
- **Systems integration features:** Assesses the reach and range of the product's integration capabilities (30 data points).
- **Licensing features:** Assesses the vendor's approach and flexibility to product licensing (17 data points).
- **Developer features:** Assesses the options open to corporate developers and independent software vendors in terms of APIs and standards support (11 data points).
- **Management reporting features:** Assesses the extent to which the product can support general management reporting requirements (13 data points).

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 only share glimpses of business performance and sales data. The six categories relating to market impact are as follows:

- **Revenue:** Private companies seldom disclose revenues, and established enterprise vendors do not usually disclose product revenue unless it is substantial, sustainable, and commercially in their best interests to do so. Also, product and vendor revenue profiles are changing with the advent of SaaS and freemium models, so Ovum is very cautious in its weighting of this factor.

- **Market competitiveness:** Ovum's examination of the enterprise file sync and share market includes a detailed look at the competitive landscape. Every vendor has a few competitors that it competes against on a regular basis, and Ovum's research methodology captures this information, using it to rank vendors accordingly.

- **Customer deployments:** The potential business value of enterprise file sync and share products is proportional to the number of employees or participants that have access to them, so one must try to determine the extent to which end users are engaging on these platforms. Vendors provide only indicative numbers when talking about paying customers and total number of end users, so Ovum tempers these figures with its own market survey data and publicly available data, such as mobile app downloads and installs.

- **Geographical penetration:** Where the information is provided, Ovum can establish the geographical reach of the product, both in terms of regional brand recognition and physical presence. Data center locations, sales operations, and provision of local support are also given merit.

- **Vertical industry penetration:** Some vendors provide industry-specific solutions and/or implementation expertise, while others partner with industry specialists and consultancies to extend their reach and range. Where provided, this information is considered along with other market impact indicators.

- **Market segment focus:** Small, medium-sized, and large enterprises often have very different business and technical requirements, and vendors deal with these segments of the market in different ways. Contract negotiation, bespoke service level agreements, customized support options, and tailored billing arrangements are important considerations for large companies and public sector organizations. Ovum considers the extent to which vendors are realistically able to address these areas.

Ovum ratings

- **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 an assessment of business-user and IT management product functionality as described in the Methodology section. Vendors appearing on this list do so based on Ovum's weightings and general enterprise requirements. Enterprises evaluating the enterprise file sync and share market should pay attention to vendors in this category.

- **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 business-user and IT management product functionality as described in the Methodology section. Ovum recognizes the significance of market impact, but it is given less weighting as it is not an easily verifiable measure.

- **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 enterprise requirements. Businesses and institutions evaluating the enterprise file sync and share market should consider the products listed in this category, as they may well align with the business and technical strategies of the organization.

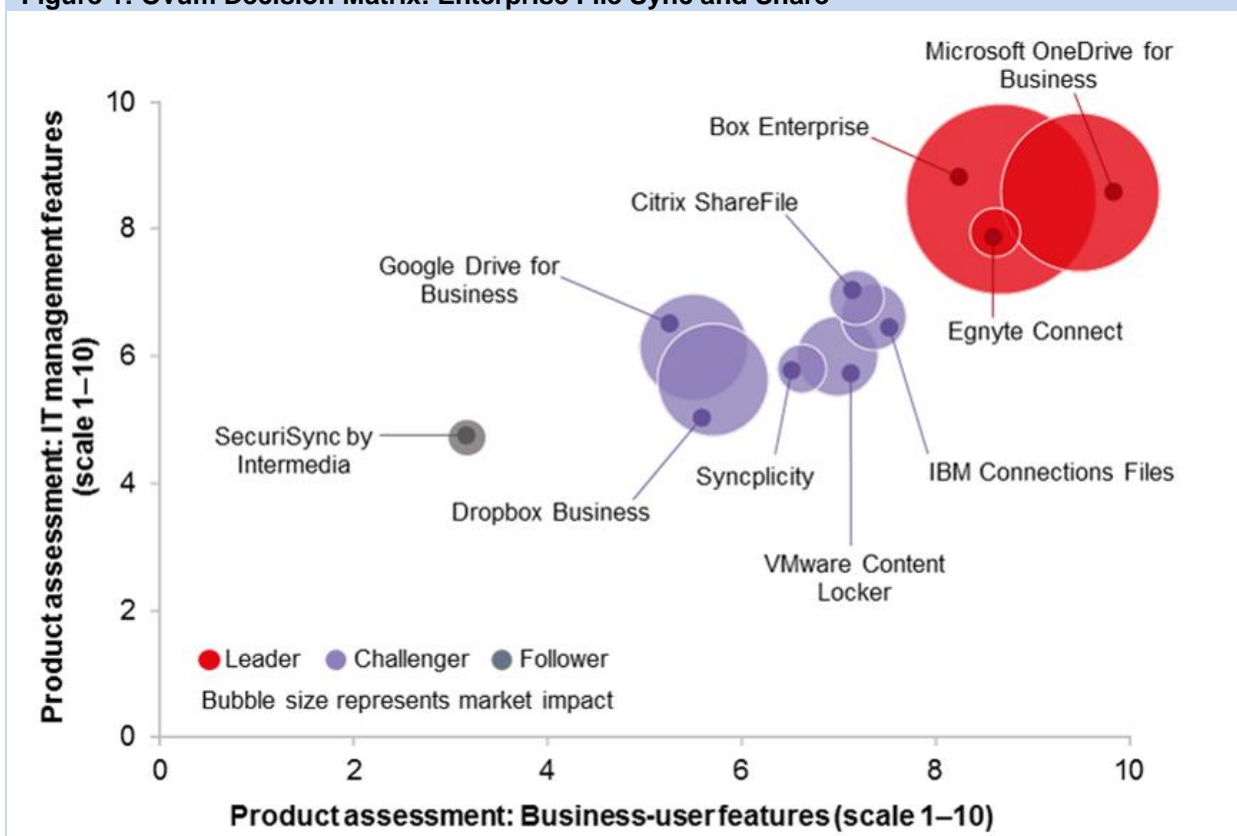## Ovum Interactive Decision Matrix

The *Ovum Interactive Decision Matrix for Enterprise File Sync and Share* is an online tool that provides enterprise decision-makers with product and IT management features that Ovum believes are crucial differentiators for leading products in this area. This tool also provides a rich source of competitive information for systems integrators, vendor partners, and independent software vendors. Access to this tool is via the Ovum Knowledge Center.

Product and market analysis

Ovum Decision Matrix: Enterprise File Sync and Share

As can be seen in Figure 1, Box, Egnyte, and Microsoft offer the strongest combination of end-user and IT management features based on Ovum's general assessment criteria. But every organization is different, with its own mix of end-user requirements, IT management requirements, and, most important of all, process requirements. Ovum provides a tool, the *Ovum Interactive Decision Matrix*, to help organizations model their requirements and identify products that meet them.

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

Source: Ovum

Table 1: Ovum Decision Matrix: Enterprise File Sync and Share

Leaders	Challengers	Followers
Box Enterprise	Citrix ShareFile	SecuriSync by Intermedia
Egnyte Connect	Dropbox Business	
Microsoft OneDrive for Business	Google Drive for Business	
	IBM Connections Files	
	Syncplicity	
	VMware Content Locker	

Source: Ovum

Ovum Decision Matrix: Leaders

Box Enterprise, Egnyte Connect, and Microsoft OneDrive for Business are three very different products, each offering different combinations of features and functions. The product assessments and charts presented in the Product Analysis section of this report show the "feature footprints" of each offering. As each assessment is based on Ovum's general set of enterprise requirements, we advise clients to examine the *Ovum Interactive Decision Matrix* and set feature weightings accordingly.

Box Enterprise

Box is one of the most significant vendors in the modern enterprise content management market, having attained its status and position by walking the fine line that divides consumer-oriented products that are a joy to use and enterprise products that are easily deployed and cost-effective to manage. From an end-user perspective, Box combines best-in-class file sharing and collaboration features on desktop and mobile devices with robust and reliable file synchronization. From an IT management perspective, Box offers excellent governance, risk, and compliance features, together with best-in-class management reporting capabilities. Box will appeal to organizations that are looking for a modern enterprise content management solution and a platform that is open to developers.

The strongest feature categories for Box Enterprise are as follows:

- File sharing features
- Collaboration features
- Governance, risk, and compliance features
- Developer features
- Management reporting features

Egnyte Connect

Many enterprises have standardized on Microsoft's productivity tools and have deployed, or plan to deploy, OneDrive for Business as part of an Office 365 rollout. However, OneDrive for Business can

prove limiting in some scenarios, requiring IT departments to add supplemental functionality. Egnyte Connect can complement OneDrive for Business by supporting a variety of additional use cases, and it can also help enterprises make the most of their existing IT infrastructure investments.

The strongest feature categories for Egnyte Connect are as follows:

- Desktop features
- Deployment features
- Administration features
- Developer features
- Management reporting features

Microsoft OneDrive for Business

OneDrive for Business is a core element of Microsoft's collaborative productivity strategy and Office applications. It is almost inseparable from SharePoint – one of the key pillars of the Office 365 platform. Provisioned either through an on-premise deployment of SharePoint Server, as part of a subscription to Office 365, or as a standalone cloud service, OneDrive for Business provides a very capable set of collaboration features that can address a broad range of enterprise knowledge-worker scenarios. With improved stability and functionality for desktop computer users, flexible deployment and licensing options for CIOs, and excellent management and reporting features for IT pros, OneDrive for Business now sets the bar for enterprise file sync and share products.

The strongest feature categories for Microsoft OneDrive for Business are as follows:

- Social features
- Desktop features
- Deployment features
- Governance, risk, and compliance features
- Licensing features
- Developer features
- Management reporting features

Ovum Decision Matrix: Challengers

Products from Citrix, Dropbox, Google, IBM, Syncplicity, and VMware occupy the "challenger" category of the enterprise file sync and share market. Again, this group presents a mix of offerings, some with a strong consumer heritage, others designed from scratch with the enterprise in mind.

Citrix ShareFile

The appeal of Citrix ShareFile is likely to increase when companies transition from point products to business IT solutions, and where other Citrix offerings add value to the end-user computing environment. Integrations between ShareFile and enterprise mobility management products (XenMobile, MobileIron, and Microsoft Intune), XenDesktop (a suite of desktop virtualization products), and XenApp (a suite of application virtualization products) make it easier to use file sync and share in a variety of mobile and virtualized environments. ShareFile is also relevant for those organizations considering Windows 10, with XenDesktop Essentials and XenApp Essentials (the successor to Microsoft Azure RemoteApp) providing an option to deploy Windows 10 virtual desktops

on Microsoft Azure. ShareFile offers Microsoft Office 365 integrations for document editing in the browser or with the native Office apps for iOS. The product is also a key component of the Citrix Workspace Suite – an offering designed to deliver the apps, desktops, and data that employees need to get work done.

The strongest feature categories for Citrix ShareFile are as follows:

- File Sharing features
- Desktop features
- Information security management features
- Licensing features
- Developer features

Dropbox Business

Dropbox has set the bar high for simple yet effective file sync and share. Dropbox Business is architected to allow users to access their personal and business Dropbox accounts from any device, with each "repository" having separate settings, controls, passwords, and data. In addition to these features, Dropbox Enterprise also offers domain management tools, collaboration insights, enterprise mobility management, network control, and premium integration and development support. IT features include single sign-on, remote wipe, account transfer, and the sharing of audit logs to give administrators more visibility and control. The updated API now allows integrations with identity management solutions, security information and event management (SIEM) products, and data loss prevention (DLP) offerings.

The strongest feature categories for Dropbox Business are as follows:

- Desktop features
- Mobile features
- Deployment features
- Licensing features
- Developer features

Google Drive for Business

As a mainstream alternative to Office 365, Google Drive and G Suite provide organizations with easy-to-use tools to manage employee-generated documents and files that can be accessed from almost any modern device and shared with external parties. AI tools, such as Quick Access, are starting to appear in the suite, adding business value and offering product differentiation. The product provides system administrators with audit and reporting facilities, and includes security features specifically designed to keep corporate data safe, secure, and under control. Google Drive is hosted in data centers that are SSAE 16/ISAE 3402 Type II, SOC 2-audited, and have achieved ISO 27001 certification. For industries or geographies subject to specific regulations, Google Drive supports FISMA, FERPA, and HIPAA. The Google third-party ecosystem extends the reach and range of Google Drive with a wide variety of integrations, making it a consistent place for users to store files.

The strongest feature categories for Google Drive for Business are as follows:

- Collaboration features

- Desktop features
- Mobile features
- Developer features
- Management reporting features

IBM Connections Files

IBM cites strong adoption of the Connections product portfolio in the retail, travel and transportation, electronics, manufacturing, and insurance industries, with its solutions appealing to businesses and institutions that need to go beyond traditional information and collaboration boundaries, such as extending business networks to partners and customers. IBM Connections Files is not a point solution; instead, it forms an integral part of a mature, comprehensive enterprise collaboration suite. Using a browser interface, desktop clients, and mobile applications, business users can access important files and keep them in sync with other users and devices. IBM Connections Files is offered on-premise or cloud, and promises to harness the power of cognitive computing to help individuals and businesses realize the full productivity and innovation benefits of enterprise social applications.

The strongest feature categories for IBM Connections Files are as follows:

- Social features
- Desktop features
- Deployment features
- Licensing features
- Developer features

Syncplicity

Syncplicity's policy-driven hybrid cloud architecture enables organizations to modernize their IT infrastructures and end-user computing environments by combining public cloud storage solutions with established on-premise document management systems. Enterprises can mix and match their storage combinations in a manner that reflects their corporate needs, security profile, and budget. Business units can migrate employee home directories and file shares to Syncplicity, thereby reducing the lure of shadow IT and non-IT-sanctioned products. The option to retain content, while still taking advantage of the cloud, is what makes Syncplicity appealing to corporate information managers. Automatic real-time sync, version control, file restore capabilities, and prioritized sync make Syncplicity an excellent choice for laptop users.

The strongest feature categories for Syncplicity are as follows:

- Desktop features
- Mobile features
- Deployment features
- Administration features
- Management reporting features

VMware Content Locker

VMware's strength in the enterprise market stems from the way in which its products bring flexibility to heterogeneous computing environments. The company's early success came in the data center, and

now its technologies are transforming the world of end-user computing. Organizations adopting mobile-first strategies will already be familiar with VMware's enterprise mobility management offerings, and will discover how well the vendor's enterprise file sync and share product fits into this portfolio. Content Locker offers flexible deployment options and good administration features, including APIs for user provisioning, and excellent management reporting capabilities.

The strongest feature categories for VMware Content Locker are as follows:

- Desktop features
- Mobile features
- Deployment features
- Developer features
- Management reporting features

Ovum Decision Matrix: Followers

Enterprise file sync and share functionality is now featured in a range of collaboration products and business solutions, ranging from digital workspace solutions to line-of-business applications. For those small and medium-sized organizations looking to business continuity, base functionality, managed services, and reduced cost of end-user support, a product such as SecuriSync hits the spot.

SecuriSync by Intermedia

Small and medium-sized organizations are the driving force of most economies, so it is important for these businesses and institutions to have practical solutions that address business continuity and information security challenges. Endpoint protection and data backup solutions should, of course, be fundamental elements of any modern digital workspace strategy, but these only become evident after an incident affects the business, and thereafter continuity becomes an issue. A more useful approach would be to integrate core backup and recovery services with file sync and share, just as SecuriSync does today.
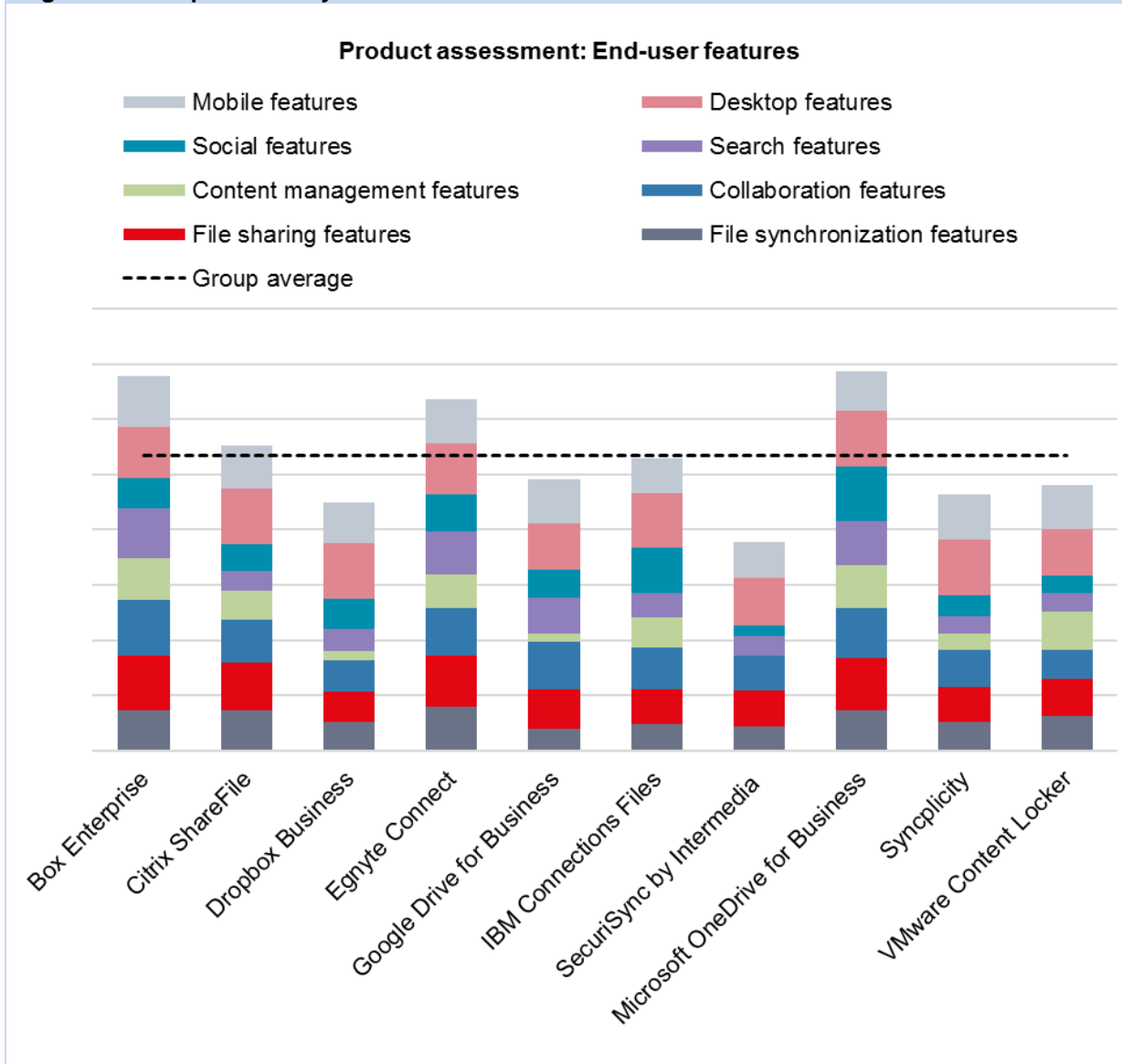
The strongest feature categories for SecuriSync by Intermedia are as follows:

- File sharing features
- Collaboration features
- Desktop features
- Mobile features
- Deployment features

Product evaluations and comparison

Product assessment: End-user features

Figure 2: Enterprise File Sync and Share: End-user features

Source: Ovum

Knowledge workers need to be able to create, share, synchronize, and collaborate on business documents and files. However, these files, in whatever guise they take, are not standalone assets; they are essential components of projects, tasks, activities, and business processes. Ownership, access rights, and provenance are still important document collaboration control functions, but it is efficacy, productivity, and simplicity that today's knowledge workers want from their digital workspaces. Box, Egnyte, and Microsoft represent three very different approaches to enterprise file sync and share. Box is the cloud-native vendor, tackling the challenge of modern content management from a totally new perspective. Meanwhile, Microsoft is the incumbent provider,

transitioning from on-premise to cloud. Egnyte represents the storage-agnostic vendor, trying to unite old and new content management strategies for mainstream and niche requirements.

Led by their consumer experiences, some employees are using their mobile devices and easy-to-use apps to get work done in new and different ways. Enabled by cloud services, such as file sync and share, enterprise end-user computing is being turned inside out, providing organizations with opportunities to remodel business processes and work activities. But as always, change has its consequences, especially where information security, privacy, and compliance are concerned. Right now, EU organizations and their business partners (information "processors") are preparing to comply with new data protection regulations (GDPR comes into force May 2018), with data protection officers implementing governance systems for the management of the controls protecting data. As part of these preparations, organizations are scrutinizing the tools used by employees and teams.

The products from Box, Egnyte, and Microsoft might have the edge on other enterprise file sync and share offerings when it comes to supporting a broad range of end-user *features*, but end-user *requirements* should be the determinant factor when selecting products of this nature. As can be seen in Figure 2, every product has a different mix of end-user features, so thought should be given to an organization's business use cases. Large enterprises, or organizations with diverse business operations, are unlikely to find a single file sync and share solution that addresses all business use cases, making a mix of two or three products highly likely.

Product assessment: IT management features

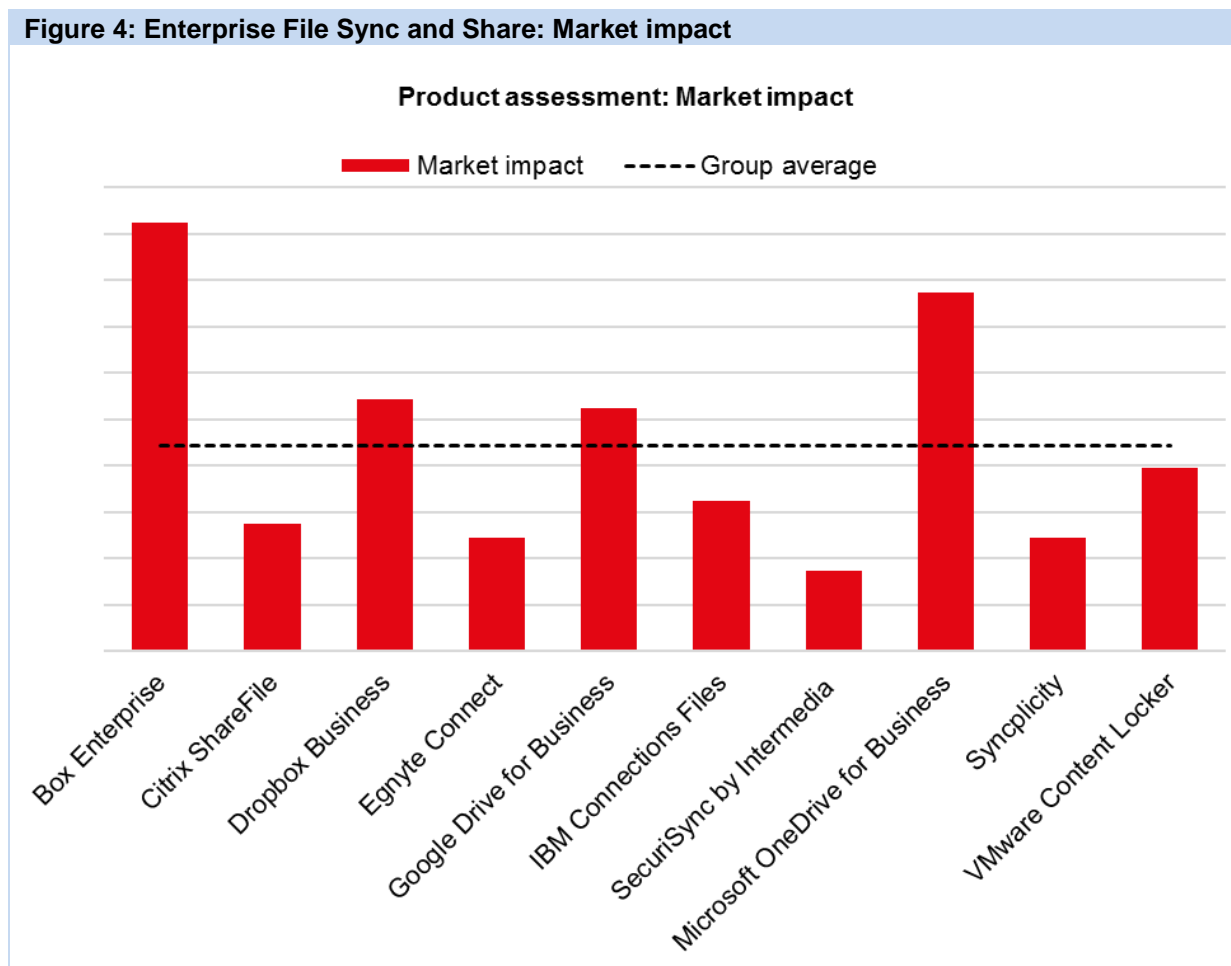**Figure 3: Enterprise File Sync and Share: IT management features**

Source: Ovum

The modern enterprise digital workspace is an employee-centric computing environment that is delivered, as a service, by those who understand the business, its challenges, and its goals. While this might be the in-house IT team, organizations are increasingly looking to system integrators, IT outsourcers, and vendor partners to support accelerated business transformation programs. A modern digital workspace must promote productivity, collaboration, and business innovation by being fit for purpose and context.

A primary role of the IT department is to select, develop, provision, and support information and communications systems that enable employees, groups, and teams to work efficiently and effectively. Modern businesses have broken free of the confines of corporate networks, locked-down PCs, and one-size-fits-all IT systems. Instead, work gets done using a variety of devices and platforms, some of which the IT department may have no control over.

The enterprise file sync and share market is adjacent to many other software categories, including employee productivity, group collaboration, mobility, information security management, enterprise social networking, and project teams. But there is one other category that should sit at the top of this list: business continuity. It is easy to forget about data backup and recovery in an era of mobile devices and cloud services, but an increase in ransomware and cyber-attacks has reminded many business and IT managers of this most important aspect of business wellbeing.

Product assessment: Market impact

Figure 4: Enterprise File Sync and Share: Market impact

Source: Ovum

IT consumerization continues to disrupt corporate IT strategy. Somewhat worryingly for IT managers, a significant proportion of the workforce – including business managers and executives – are now "doing IT" for themselves, often using their own devices, self-provisioned tools, and cloud services to get the job done. File sync and share is a perfect example of this, with employees using Dropbox, Google Drive, Microsoft OneDrive, and other consumer-oriented services. The knee-jerk reaction of some IT managers is to block and eradicate any product not sanctioned by the IT department. Others, however, are looking more closely at what is on offer and determining whether such products might be tamed and harnessed to meet business requirements.
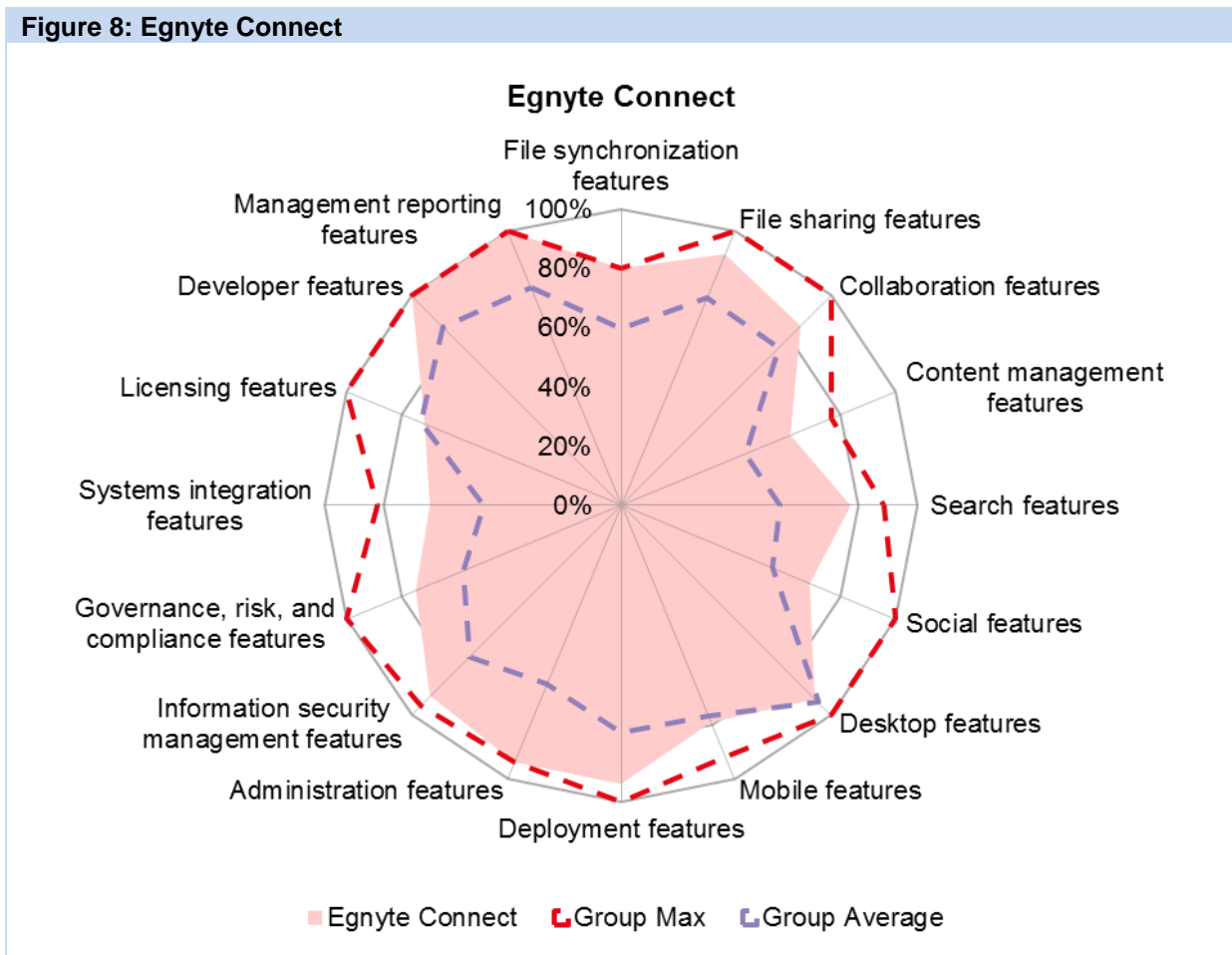
IT departments have used file synchronization and content distribution products for many years, but vendors did not typically package these capabilities for the knowledge worker. Today, a variety of

vendors are vying for attention in the enterprise file sync and share market, each offering the necessary administration, audit, security, and reporting features that distinguish a business-ready product from a consumer-oriented rival. However, only a handful of vendors can address the very real business need for on-premise, cloud, and hybrid deployments, as this requires a deep understanding of enterprise IT infrastructure as well as cloud-native operations.

Product analysis

Egnyte Connect: Ovum Decision Matrix – Leader

Figure 8: Egnyte Connect

Source: Ovum

Strengths

Egnyte Connect caters to the needs of administrators, compliance officers, and IT infrastructure managers

As a single solution, Egnyte Connect provides a range of storage administration features that address the scenarios necessary to deliver high levels of enterprise flexibility. The product 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. Separate instances can be organized under one corporate umbrella to separate storage

and sharing, yet be centrally managed for organizations with multiple business units or operating divisions. Files can be hosted in the cloud or on-premise per information privacy needs. Files can also be restricted to specific geographies. Egnyte is compliant with HIPAA, FINRA, SSAE 16, SOC 2, and so on, and can provide a comprehensive set of management and audit reports.

Egnyte Connect can enhance business continuity and accommodate scenarios where connectivity is limited or sporadic

Egnyte offers a unique hybrid deployment option where the same file is stored both in the cloud and on-premise, with both copies in sync always. Any changes made to either the cloud or on-premise copy synchronizes instantly. In case of a connectivity issue, users can continue working from the on-premise copy. Or, if the on-premise storage infrastructure fails, users can access and work on the cloud copy. In some industry scenarios, such as construction, a hybrid architecture is required because connectivity and internet access may be limited and/or sporadic.

Work in progress

The Egnyte Connect universal desktop app will enhance online and offline access to personal files and enterprise content

The enterprise file sync and share market has matured to a point where anywhere, anytime, any device access to one's personal files is a given. The next challenge is to provide the business user with unified access to all the corporate content they require to get the job done, and to do so in a manner that feels native to the device they are using. Egnyte is fine-tuning its universal desktop client, which has already been made available to its existing customers and will be generally available in April 2017. The new app includes the ability to access and share any content directly from within Windows Explorer or Mac Finder; the ability to mark select business-critical folders for offline access, with automatic file syncing when the computer is online; and optimal access to content based on user and content location.

Content migration strategies should be considered as part of any enterprise file sync and share deployment initiative

The enterprise file sync and share market grew from the early successes of consumer-oriented products, with synchronization between the desktop computer and cloud storage being the primary model. Mobile apps extended the use case and thereby established the cloud as the central storage hub. In the meantime, on-premise file servers and content management systems became satellite repositories, landlocked behind the corporate firewall. These repositories may be considered "legacy systems" by some, but they still feature heavily in many back-office business processes. Egnyte has recognized the need to address the consolidation/migration issue, and has developed the Egnyte Cloud Migration Tool. The product is designed to facilitate and accelerate cloud adoption by making it easy for customers to decide which files to keep on-premise and which ones to migrate to the cloud, keeping permissions intact and providing full auditing capabilities.

Opportunities

Data protection services are fast becoming "table stakes" in the enterprise file sync and share market

Egnyte Protect clearly presents the next set of opportunities for the company, providing enterprise customers with access control and real-time alerting features and in the future, selective encryption,

data residency, and data retention. These features mark the transition point from an employee productivity platform to a mission-critical enterprise content management platform. The selective encryption capabilities are likely to be of interest to all enterprises, especially those operating in heavily regulated environments; the data residency features will appeal to companies operating outside of the United States; and the data retention features of Egnyte Protect will address Ovum's long-standing concerns relating to data archiving and preservation.

Threats

Maintaining long-term market differentiation in the file sync and share market

File sync and share features are now being included in a wide range of products from a diverse set of vendors. This presents a threat to pure-play vendors as it reduces the size of the addressable market considerably. However, Ovum believes that large enterprises will struggle to standardize on a single file sync and share product (even if it is provided "for free" as part of a CRM system or project management platform) due to diverging business requirements, and at this point CIOs will start looking at complementary solutions that interoperate and coexist. Products favored by certain industry verticals will have more leverage than those that are not, so vendors must consider their tactical alliances carefully.

Appendix

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Ovum Consulting

We hope that this analysis will help you make informed and imaginative business decisions. If you have further requirements, Ovum's consulting team may be able to help you. For more information about Ovum's consulting capabilities, please contact us directly at consulting@ovum.com.

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