

Magic Quadrant for Content Collaboration Platforms

Published 9 July 2018 - ID G00340256 - 65 min read

By Analysts [Monica Basso](#), [Michael Woodbridge](#), [Karen A. Hobert](#)

Content collaboration platforms can transform how individuals and teams work. Inside or outside organizations, they add structure and insight when collaboration involves unstructured data. This Magic Quadrant profiles 14 vendors to help you find the right CCP for digital workplace scenarios.

Strategic Planning Assumption

By 2022, 50% of midsize and large organizations in mature regional markets will use a content collaboration platform to implement document workflows and improve collaboration and productivity.

Market Definition/Description

As defined by Gartner, the content collaboration platform (CCP) market covers a range of products and services that enable content productivity and collaboration. CCPs are aimed at individuals and teams, inside or outside an organization. Additionally, CCPs increasingly support lightweight content management and workflow use cases.

Core user functionalities include:

- Mobile access to content repositories.
- File synchronization across devices and cloud repositories.
- File sharing with people and applications, inside or outside an organization.
- Team collaboration, with dedicated folders.
- A content repository. This can be cloud-based or on-premises, native to the CCP platform or based on other file servers or repositories.

Common additional CCP functionality to support business users and IT administrators includes:

- Multiclient support, including native mobile apps, a web browser client, a native desktop app, and integration with third-party productivity or management apps.
- Modern user interfaces with optimized user interaction features, such as "drag and drop" for files and opening of files in mobile apps.
- Granular file, folder and subfolder access, synchronization, sharing and search; additional "drive" and "streaming" capabilities for an enhanced user experience on desktops, with folders in a cloud

repository (streaming means that users get access to an unlimited file space without using their hard drive space).

- File creation, editing, annotation and note taking for user productivity – natively or through integration with third-party suites such as Microsoft Office 365 and Google Docs.
- Workspaces for teams or projects, with collaborative content authoring, change tracking, file comments, conversations and file versioning. "Team drive" functionality on the desktop can replace traditional network drives and file shares.
- Federation of external file servers and content repositories with the CCP repository, and unified search and retrieval across repositories for IT administration and governance. Integration with corporate data infrastructure and repositories, enterprise servers and cloud services.
- APIs for accessing content in the CCP repository or mapped data space, and prebuilt connectors to commonly used productivity and business applications or systems.
- Lightweight content management, including version management, metadata classification, search, retention policies, audit trail and e-discovery.
- Workflows, including document-based process automation with actions on files, task notifications, and file handling triggered by events, natively or through other tools.
- Content analytics and analysis for IT and business insight, including user preferences, work patterns, social interactions and touchpoints.
- Security and data protection on devices, cloud services, repositories or servers. This includes password protection, data wiping, encryption, data loss prevention (DLP) and digital rights management (DRM).
- Data governance, including file access control, retention, centralized oversight, classification and data residency. Compliance with the EU's General Data Protection Regulation (GDPR) (see Note 1) and with other regulations.
- Administration and management, including integration with standard enterprise identity, access management and authentication protocols; policy and rule management, with centralized management tools; performance-reporting dashboard with visualization.
- Flexible deployment models, including public, hybrid or private clouds, and on-premises.

CCPs are platforms with a range of common elements:

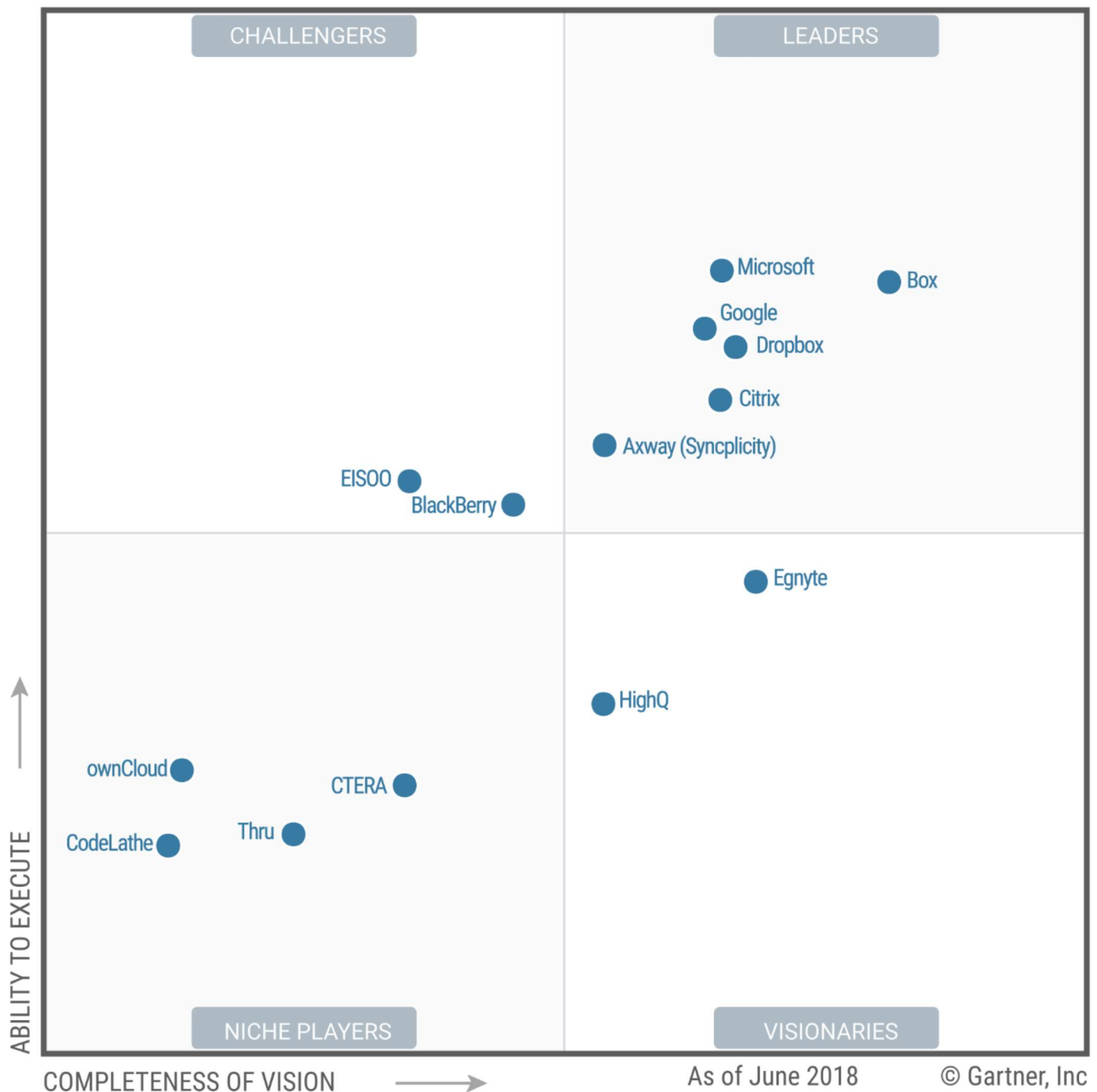
- A repository.
- APIs, connectors and designer tools.
- Integrated services.
- User interfaces and clients.
- Integration and extensibility.

CCPs enable organizations to implement a content service strategy, through the range of functionality, repository and interfaces described above. Depending on the extent of a business's requirements and use cases, a CCP may represent a key investment for creating a digital workplace (see Note 2). CCPs are especially adept at addressing content strategies that focus on file sharing, content collaboration and lightweight workflow requirements.

All the CCPs covered in this Magic Quadrant are stand-alone products with file syncing and sharing as their core capability. This kernel is enhanced by additional functional layers of collaboration and content management capability. The CCP market's transformation is analyzed in "Give Content Collaboration Platforms a Bigger Role in Your Content Services Strategy."

Magic Quadrant

Figure 1. Magic Quadrant for Content Collaboration Platforms



Source: Gartner (July 2018)

Vendor Strengths and Cautions

Axway (Syncplicity)

[Axway \(http://www.axway.com/\)](http://www.axway.com/) is a public company that was founded in 2001. Based in Phoenix, Arizona, U.S., it has regional headquarters in Brazil, France and Singapore, and smaller offices distributed globally. In February 2017, Axway acquired Syncplicity, which now provides Axway's CCP. Axway AMPLIFY Syncplicity is available as a stand-alone component or as part of Axway's data integration platform, AMPLIFY. The AMPLIFY platform provides a content collaboration service via Syncplicity, along with other services such as analytics, API management, managed file transfer (MFT), application development and integration. This combination of capabilities enables Axway to pursue more digital transformation, IT modernization, data governance and digital workplace opportunities.

Group role and permission management is relatively fine-grained and integrated with common enterprise management tools. Syncplicity's deployment options include public, hybrid or private cloud and on-premises. When procured as part of the AMPLIFY platform, Syncplicity can offer an extensive hybrid cloud content platform.

Axway sells its products directly through its sales organizations. Additional sales are supported through a small range of channel partners. Its main customers are large organizations with distributed locations in sectors such as manufacturing, financial, healthcare and automotive.

Syncplicity is suitable for large enterprises that want to enable productivity and team collaboration but are not ready for a public cloud deployment. Organizations looking to modernize their existing data infrastructure through a hybrid cloud architecture – with integration with current enterprise management capabilities – should consider Syncplicity. It is a suitable choice for replacing or optimizing traditional storage with cloud options, while enabling collaborative work styles with security and compliance.

Strengths

- A key component of Axway's vision for Syncplicity is to provide enterprises with a flexible set of options to modernize existing content storage and collaboration technologies. This flexibility is evident in its deployment options (on-premises, private, hybrid and public), data residency (policy-driven storage model) and security management controls.
- Syncplicity provides strong capabilities for data infrastructure modernization, such as desktop replication and protection. An extensive array of migration adaptors is available, covering file system, other CCP products and legacy content service platforms (CSPs). A set of comprehensive migration administration dashboards enables organizations to track the end-to-end process.
- Axway has generally good reference customer feedback about its overall responsiveness. This applies to the presales cycle, support issues, and collaboration with the product team regarding new feature development and priorities.

Cautions

- Syncplicity lacks core features to address lightweight content management use cases, particularly workflow, and metadata and information governance in the form of retention and disposition. These capabilities are under development for future availability.

- Syncplicity lacks a number of collaborative features that are quite commonplace in the CCP market. Social features, such as recommendations and likes, are missing, as is integration with common workspace collaboration tools, such as Slack and Quip (although integration with Circuit is available). There is no capability to annotate and comment on content directly in the Syncplicity interface.
- Although Syncplicity contains a wide range of flexible administration controls, some reference customers' feedback suggests that the administrator user experience can occasionally be complex.

BlackBerry

BlackBerry (<https://us.blackberry.com/enterprise/blackberry-workspaces>) is a public company, founded in 1999, with headquarters in Waterloo, Ontario, Canada and other offices in North America, Asia/Pacific and Europe. Its background is in enterprise mobility, secure mobile productivity and collaboration. Workspaces, BlackBerry's CCP offering, has evolved from the acquired WatchDox technology and focuses on enhanced security and content collaboration.

Workspaces is available as a stand-alone product or as part of the BlackBerry Enterprise Mobility Suite, Content Edition, the latter being the most common purchasing route. Workspaces is integrated with a range of products in this suite, including BlackBerry Unified Endpoint Manager Dynamics (mobile application security); BBM Enterprise (secure messaging); AtHoc (crisis communication); and SecuSUITE (messaging encryption). BlackBerry Dynamics enables secure content sharing between BlackBerry apps, BlackBerry partner apps and custom enterprise apps. These applications and services expand the range of addressable collaboration scenarios when security is a prime consideration.

Workspaces can be deployed on-premises, in a public cloud or in a private cloud, with multiple hybrid options. Enhanced capabilities, such as native DRM and secure viewers, exemplify the platform's security focus.

BlackBerry sells to customers worldwide through its own sales team and channel partners, including service providers, telecommunications carriers and independent software vendors (ISVs). Microsoft is a key strategic partner and resells BlackBerry applications and services on its Azure platform. Workspaces' primary customers are in regulated sectors, such as financial services, government and healthcare, where privacy and disclosure regulations are key drivers. It also has a significant presence in technology, media and entertainment, where concerns about the protection of intellectual property rights (IPR) are strong.

BlackBerry is suitable for midsize and large organizations in regulated or IPR-sensitive sectors. These organizations aim to enhance mobile worker productivity and collaboration across both internal and extended teams.

Strengths

- BlackBerry has a coordinated vision for organizations looking to comply with the EU's GDPR legislation. At a high level, BlackBerry has a GDPR assessment service to guide customers through GDPR compliance. Within Workspaces there are numerous features, including controls for data residency, metadata to enable content identification and comprehensive privacy controls. Workspaces' ability to federate other repositories enables it to implement appropriate controls across content sources for effective GDPR compliance.

- Workspaces has particular strength in business scenarios where there is a heavy reliance on secure mobile working. When procured as part of BlackBerry's integrated Enterprise Mobility suite, Workspaces can provide stronger security for content collaboration. Among other things, it provides controls such as endpoint protection, mobile device management and secure messaging.
- The most frequent praise expressed by BlackBerry's reference customers was for the depth of its security controls.

Cautions

- Workspaces is typically deployed as a bundled offering within the BlackBerry Enterprise Mobility Suite, although it is also available as a stand-alone CCP that supports multiple content collaboration use cases, beyond mobile productivity.
- Workspaces lacks the analytics capability to extract insights from stored content, at a time when such capabilities are becoming more common in the CCP market. It is possible to export metadata for processing in external systems, but content-based analytics for text and rich media are not currently available. BlackBerry plans to integrate Workspaces with its separate BlackBerry Analytics platform.
- Some reference customers reported a lack of flexibility in BlackBerry's licensing models, and a lack of licensing reporting mechanisms. BlackBerry is migrating customers with legacy licensing onto a new flexible licensing model.

Box

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

Box's services are implemented in its own U.S. data centers, with regionalized storage through Amazon Web Services (AWS), and IBM's and Microsoft's localized data centers. Box integrates with Microsoft Office 365 and Google G Suite and supports numerous file format viewers in its interface. Enhanced capabilities for content streaming, real-time editing, machine learning, lightweight workflow and analytics are also available. Intelligent services support autotagging, data extraction and transcription of existing rich-media content. Box provides extended security, compliance and administrative capabilities. These include cloud data protection and governance capabilities, and customer-owned encryption key management (Box KeySafe). It also provides regional content storage implementation (Box Multi Zones). Box has many compliance certifications, including GxP (good practices) guidelines for life science applications. Box offers rich capabilities for GDPR compliance, and was recently recognized for meeting security and data protection standards in Germany with Cloud Computing Compliance Controls Catalogue (C5) and Trusted Cloud Data Protection Profile (TCDP). Box Platform enables organizations to leverage content stored in the repository through APIs for integrating, customizing and extending applications and interfaces. Box is developing AI services including a user graph and its Skills framework for artificial intelligence (AI) extensions, currently available to clients through its beta program.

Box sells its enterprise offerings both directly and through a network of partners. Box Platform offers consumption-based pricing for enterprises looking to develop externalized content collaboration applications. A number of very large deployments (for many hundreds of thousands of users) indicates the scalability of Box's cloud solution. As an organization, Box has diversity-oriented values, and is quite active in non-profit-sector innovation and support.

Box is suitable for public-cloud-friendly organizations prioritizing digital workplace transformation and lightweight business processes automation needs. It is a viable option for stand-alone content collaboration use cases, particularly when externally facing collaboration scenarios and customized applications are involved.

Strengths

- Box's digital transformation messaging is an end-to-end story with a clearly planned product roadmap. It extends content collaboration through intelligence, enhanced user experiences and enterprise-oriented governance, protection and oversight.
- Box offers a complete set of capabilities including workflow, metadata management, content collaboration and intelligent services, on a scalable secure public cloud platform.
- Reference customers that have adopted the content services aspects of Box, along with its collaboration and productivity features, reported successful results.

Cautions

- Box's product offering goes beyond CCP capabilities by including aspects of a CSP. For customers looking only for a CCP, this can cause confusion and raise cost concerns.
- The inconsistent delivery and depth of some much-anticipated features has prompted frustration and skepticism among customers. Box Relay is a lightweight workflow engine; it was released in late 2017, after some delay, and is a solid, but limited, first version of a much-anticipated product.
- Reference customers consider Box's offering to be expensive, compared with other options on the market. It is sometimes hard for organizations to justify the price, especially if they are looking for simpler capabilities.

Citrix

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

Citrix's CCP offering is ShareFile (since rebranded as Content Collaboration). ShareFile targets, on the one hand, users' content productivity and collaboration needs. On the other, it targets IT infrastructure modernization, security, compliance and integration requirements. ShareFile enables organizations to integrate distributed and fragmented content repositories through connectors, without requiring migrations to a cloud repository.

Citrix extends its capabilities to a range of other repositories, including file shares, on-premises content services platforms and other cloud services. Connectors to these services are natively integrated within ShareFile, and through them ShareFile supports hybrid deployments. In addition to a public cloud model, ShareFile offers a hybrid architecture and a private storage model. Customers can store and manage data in Citrix's cloud, in on-premises private data storage (StorageZones) or in supported third-party cloud storage. The integrations through connectors extend ShareFile's capabilities, including those for control and governance, to existing corporate repositories.

ShareFile is sold both as a stand-alone product and bundled with Citrix virtualization and mobility suites. With ShareFile, Citrix targets business users seeking increased content efficiency and productivity, and IT administrators wanting control, visibility and regulatory compliance. It prioritizes the healthcare, financial services and professional services sectors, which are characterized by strong requirements for external collaboration, governance and compliance. Citrix sells to small, midsize and large enterprise organizations – at a global level, both directly and through a strong network of partners.

Citrix is a good choice for a broad spectrum of collaboration and productivity-based scenarios. In particular, ShareFile appeals to customers with complex external collaboration use cases that have data protection and compliance requirements. This appeal extends to customers needing virtual data rooms, for which Citrix ShareFile is often shortlisted. Citrix is also a good choice for infrastructure modernization use cases. ShareFile helps avoid the need to migrate legacy content repositories to a cloud service, and to keep content located in specific geographies; as such, it is a good option for regulated industries.

Strengths

- Citrix's product vision builds on its portfolio products to prioritize customers' digital transformation initiatives. Its range of operation extends from supporting IT organizations and modernizing their data infrastructure through progressive cloud adoption to enabling users with new productivity and collaboration capabilities. Citrix focuses its roadmap developments on AI technologies in order to offer intelligent workspace experiences, enhanced search, recommendations across repositories and smart controls.
- Citrix ShareFile offers workflow capabilities for document process automation. It extends beyond document routing and approval to feedback, forms, signatures and definition of custom-structured flows, including workflow execution.
- Reference customers commonly value ShareFile as a feature-rich offering that comes at an acceptable price, which includes unlimited external collaborators and shared data. They also indicated overall satisfaction with its ease of use, user training and support, and with its straightforward deployment, especially in environments where Citrix infrastructure is already present.

Cautions

- Citrix's vision for ShareFile is very limited for content management, particularly for aspects such as metadata and classification, and for information governance.
- Citrix ShareFile lacks compliance with sector-specific U.S. certifications such as the Family Educational Rights and Privacy Act (FERPA), the Federal Information Security Management Act (FISMA) and the Federal Risk and Authorization Management Program (FedRAMP), although FedRAMP compliance is being pursued.

- Reference customers identified occasional issues with performance when uploading, downloading and opening files, when using on-premises connectors. Limitations on moving folders in batches were also reported.

CodeLathe

[CodeLathe \(https://www.getfilecloud.com/\)](https://www.getfilecloud.com/), a private company founded in 2012, has headquarters in Austin, Texas, U.S. and additional offices in Chennai, India.

CodeLathe's CCP offering is FileCloud, a unified file service platform that offers file synchronization and sharing, backup, content management, productivity, collaboration and search. FileCloud supports mobile productivity and team collaboration, with extensive data protection and governance capabilities. It enables user access to enterprise content repositories and collaboration, without requiring data migration to a separate cloud repository. FileCloud is deployable in a private cloud (FileCloud Server), a public cloud (FileCloud Online) and hybrid architectures. Organizations can choose to implement FileCloud on public cloud infrastructure, such as that of AWS and Microsoft Azure, or private data centers. FileCloud ServerSync replicates and keeps synchronized relevant files and NT File System (NTFS) permissions from local file servers to the cloud, optimizing access and performance for remote users. FileCloud enables data infrastructure modernization scenarios, thanks to its flexible cloud implementation, backup and disaster recovery support. FileCloud integrates with third-party cloud applications such as Microsoft Office 365.

CodeLathe goes to market through direct selling, as well as indirect selling via service providers and resellers – serving mostly midsize enterprises. Its customers are in sectors such as automotive, construction, engineering, manufacturing, banking, finance, insurance, government, managed service provision and education.

CodeLathe is a good choice for organizations that have work environments distributed across different countries, and that prioritize compliance, security and control of deployments. Typical customers prefer on-premises or private cloud deployments, and deal with petabytes of data stored in legacy, on-premises infrastructure, such as file servers and network-attached storage. Nonetheless, CodeLathe aims to enable user access from remote locations to corporate file servers, with acceptable performance achieved through centrally managed control.

Strengths

- CodeLathe addresses global organizations operating across regions. FileCloud enhances productivity in distributed working environments with fragmented data infrastructure. It enables regional data location, governance and compliance constraints. Extensive ad hoc capabilities to address GDPR requirements are available for chief data officers, security and risk managers and IT administrators.
- FileCloud can be white-labeled and allows for service customization; that is, customers can run it as an own-branded service with their internet domain (rather than that of their service provider). This avoids common issues with external collaboration scenarios – where third-party organizations filter consumerized cloud services. FileCloud includes metadata classification and robust file search functions.
- Reference customers for CodeLathe reported great experiences with FileCloud. This applies to both end users and IT administrators.

Cautions

- CodeLathe's product vision in the CCP market remains limited. It is missing workspaces for team collaboration support, and integration connectors for most content repositories (including Microsoft SharePoint). Native DRM capabilities are not available. Nor are workflows.
- CodeLathe is a very small, private organization with limited resources and customer base. It offers limited support for customers outside the U.S., despite a growing network of partners. It competes against bigger CCP players that execute more strongly.
- Reference customers for CodeLathe reported limited capabilities in terms of end-user training support. They also mentioned limited availability of local third-party resources, such as system integrators and service providers, to help with deployment and provide other support.

CTERA

CTERA (<http://www.ctica.com/it-initiatives/private-enterprise-file-sync-share/>) Networks is a private company, founded in 2008. It has its global headquarters and research and development (R&D) center in Petach Tikvah, Israel, and a U.S. base in New York. CTERA offers products and services for file productivity and collaboration, management, security and governance, cloud object storage, backup and restore.

CTERA's CCP offering is called Files Services Platform (FSP). It supports secure remote file access, synchronization, sharing and collaboration. On the IT side, FSP connects enterprise servers, physical and virtual desktops and mobile devices to its cloud file system. FSP has a hybrid architecture, which can integrate multiple public and private clouds. It also enables file management, security and data protection, and governance across endpoints and remote offices. It provides for migration, backup and restore, utilizing either a dedicated cloud storage service or on-premises data centers.

CTERA FSP can be deployed completely on-premises, in private cloud or hybrid architectures, or in a public cloud (through its hosted SaaS version). Organizations can deploy it on their own private cloud platforms as a purely software layer. Alternatively, they can subscribe to CTERA's fully hosted service (on Microsoft Azure or AWS). CTERA's CCP is also available as a white-label product for branding and customizing according to the customer's needs.

CTERA's go-to-market strategy is based on a growing ecosystem of technology alliance and channel partners, including IBM, Hewlett Packard Enterprise (HPE) and Dell EMC. It also partners with some large service and telecom providers that rebrand and resell its solution to their own clients. CTERA also sells its CCP product directly to enterprise clients through its sales organization. CTERA's primary target sectors are government, defense and finance, which focus on security and compliance; also media, for optimized file services in distributed environments. The CTERA platform is available on a white-label basis for telecom providers to deliver branded services to their end customers.

CTERA is a good choice for organizations that have highly distributed users and offices, and that prioritize data privacy or data sovereignty. The company aims to modernize its file storage infrastructure by moving to the cloud. In the meantime, it is pursuing greater collaboration in order to maintain security and data protection. CTERA optimizes support for data infrastructure modernization use cases, including protection of corporate boundaries, and backup and restore.

Strengths

- CTERA's product vision is focused on a unified platform for enterprise file services, spanning data infrastructure modernization and digital workplace enablement. Its FSP enables flexible and agile implementations to address customers' requirements for access, productivity, performance and governance. A hybrid architecture grants multiple deployment options. CTERA also draws on its strategic partnerships with storage players such as IBM, HPE, Dell EMC and NetApp. CTERA has a secure workspace function for external content collaboration.
- CTERA gives users optimized access from their computers to files stored in the cloud – for users in main offices and remote ones – which eliminates restrictions on desktop resources. A caching engine accelerates data synchronization and optimizes storage utilization.
- Reference customers reported very strong satisfaction with CTERA's support for IT governance, data security and protection, particularly in regulated industries.

Cautions

- CTERA's product vision is heavily focused on infrastructure modernization use cases and the priorities of IT administrators. On the productivity and collaboration side, limitations include a lack of integrations with enterprise products such as Microsoft SharePoint, Google G Suite, Slack and Salesforce Platform. On the content management side, workflow capabilities are not available.
- CTERA is a small company, compared with the other vendors in this Magic Quadrant. Its resources and presence in the CCP market are limited, despite its consistent network of channel partners and distributors.
- Some reference customers reported limitations in terms of customer support. CTERA is investing in expanding its support organization and providing services through partners.

Dropbox

[Dropbox \(http://dropbox.com/\)](http://dropbox.com/) is a public company, founded in 2007, with headquarters in San Francisco, California, U.S. and additional offices in the U.S., Australia, Europe, Israel and Japan. Dropbox delivers Dropbox Business, an enterprise-secure content platform for content and team collaboration. Dropbox made its much anticipated and highly successful initial public offering (IPO) in late March 2018, entering the market with an initial price that was higher than expected.

Dropbox Business is available as a public cloud service only. It includes storage, file productivity and sharing, team project collaboration, central IT management and security features. End users appreciate the simple user experience across any device platform, and the enhanced interfaces to work with an extensive list of file types. Teams can collaboratively author and present content, with Dropbox Paper. As a collaborative workspace, Dropbox Paper adds context and conversations to all types of content, from tasks and tables to code, videos and files. It allows for streaming comments and direct annotations to files from the user interface. Dropbox provides extensive security and administration features, with an enhanced interface. Administration tools and dashboards give the needed visibility and control to manage an enterprise collaboration solution. Management features include separation of personal and business data in two connected accounts and remote wiping of business data from users' devices.

Broad adoption by individuals continues to drive Dropbox's expansion in the enterprise market. IT departments often decide to convert individual or group usage of Dropbox into regular IT services with Dropbox Business. Sold both directly and through channels, Dropbox Business is available in three pricing levels to meet the needs of different business clients. Pricing options range from a plan for small, entry-level services to the "Enterprise" plan designed for large organizations that require additional security management and control features.

Dropbox is a good choice for organizations that aim to enable modern file productivity and collaboration with external parties, and that prioritize user experience and flexibility. It is particularly suited to creative teams looking for seamless content collaboration and task management. Organizations can use Dropbox to increase adoption as many users are accustomed to using Dropbox's service as a personal tool.

Strengths

- Dropbox's focus is on enabling a modern environment for collaborative content creation, for highly specialized productivity scenarios. It also aims to exploit back-end intelligence, including machine learning, to enhance experiences. The company's vision extends to automation for content classification and content creation.
- Dropbox's IPO and continued investment in R&D mark a strong start for the business's new incarnation, which will give its shareholders confidence. In addition, Dropbox has a large installed base on which to draw for future sales.
- Reference customers provided strong praise for Dropbox Business's functionality, user experience and interfaces, and administration. They value Dropbox's ease of deployment, scalability, regular upgrades, and presale and postsale support.

Cautions

- Lack of clarity about future features and the product roadmap can confuse customers and impair their ability to plan ahead.
- Dropbox has limited native capabilities to connect to other content repositories for consumption.
- Reference customers expressed confusion about shifting from self-service to enterprise contracts and pricing.

Egnyte

[Egnyte \(http://www.egnyte.com/\)](http://www.egnyte.com/), a private company founded in 2008, has its headquarters in Mountain View, California, U.S. It also has offices elsewhere in the U.S., and in India, Poland and the U.K.

Egnyte's CCP offering is based on two integrated products: Egnyte Connect for content collaboration user experiences, and Egnyte Protect for advanced governance and protection of enterprise content. Egnyte is a unified content collaboration and protection platform, with flexible deployment options, as well as online and offline user experiences. Its service-led architecture includes administrative, content protection, analytics, life cycle, distributed file service, infrastructure and foundational capabilities. Its value proposition focuses on centralizing content collaboration, protection and infrastructure through

flexible deployment architectures. It also offers a centralized content repository (physical or virtual) with a unified control model.

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

Egnyte has relatively broad vertical coverage with its largest industries being media and entertainment, financial services and construction. Localization for Canadian French and for German helps expand its geographical presence. GDPR support covers 24 languages, with analytics capabilities to detect personally identifiable information, protected health information, banking data and other private information for compliance purposes. There is a specialized administration panel for managing policies and classification of private information across cloud and on-premises repositories.

Egnyte is a good choice for organizations that struggle to control the increasing number of content repositories and to support hybrid architectures and usage. A focus on collaboration and governance for native, virtual and remote sources is a differentiating aspect of Egnyte's offering. Organizations for whom security, privacy and geographical data residency and privacy are important should consider Egnyte. Organizations with distributed workforces and remote offices should consider Egnyte for its smart governance of the storing and sharing of files, and access to files depending on user profile.

Strengths

- Egnyte is an innovative vendor striving to provide flexible services for the distribution and protection of enterprise content. Its smart caching with the desktop client, GDPR support and innovations in the distributed hybrid content environment are differentiators.
- Egnyte's dedication to content protection and integrated experiences for enhanced collaboration use cases keep customers coming back for more and expanding their investments.
- Reference customers used Egnyte's hybrid deployment options and spoke highly of Egnyte's support during and after implementation.

Cautions

- Egnyte has been slow to localize its product for non-English-speaking regions. Its initial localizations – limited to Canadian French and German – have only recently become available.
- Customers looking for simplified CCP deployment experiences might find Egnyte's value proposition overly technical and complicated.

- As Egnyte is one of the smaller vendors, its user community is limited. Reference customers commented that they had to work directly with the vendor to receive product management support, but they also praised Egnyte's support team.

EISOO

[EISOO \(https://global.eisoo.com/\)](https://global.eisoo.com/) is a private company, founded in 2006, with headquarters in Shanghai, China and offices in mainland China and Hong Kong. EISOO offers a range of products, including secure content collaboration platforms and document management, backup and recovery, and object storage. On the one hand, an open content platform supports productivity, team collaboration and document management requirements — the AnyShare Family. On the other, an open content storage platform enables a unified approach to storage, the AnyStorage Family, and copy data management and recovery with AnyBackup. EISOO offers a distributed hybrid storage architecture that, complemented by file analysis, security and management services, enables data infrastructure modernization scenarios.

EISOO's CCP offering is called AnyShare. The AnyShare Family is a broad product suite that targets end users and IT organizations. AnyShare uses a distributed hybrid content architecture and allows integration of multiple content repositories through connectors (AnyShare Universal). Mobile productivity is supported with optimized mobile apps. AnyShare can be deployed on-premises or in private or hybrid cloud models. AnyShare supports security features such as remediation for viruses, malware and ransomware.

EISOO's go-to-market strategy is based on direct sales through local teams, as well as sales via channel partners. In Asia/Pacific, industry channels and business channels are available through strategic partners, distributors, and platinum and gold medal certified channel partners. In addition, EISOO offers customer support through localized technical teams and service providers. EISOO uses strategic partners to expand into other regions, and into specific sectors.

EISOO serves midsize and large organizations. It also targets security-conscious and regulated organizations, particularly those in the government, education, finance, healthcare and energy sectors.

EISOO is a good choice for organizations with distributed office locations and knowledge-intensive activities that deal with a large amounts of data in collaborative environments. These include universities, technology companies and design institutions. Its customers prioritize hybrid architectures for modern productivity and collaboration, consolidation of legacy infrastructure and integration of new capabilities with existing file servers and data repositories. Data infrastructure modernization is a typical use case.

Strengths

- EISOO envisions a common approach to content services through a unified platform that meets content collaboration and content management requirements. Its product roadmap includes AI-enabled content classification, analysis and governance.
- EISOO is a strong player in Asia/Pacific markets, with local presence through 30 offices in China, Hong Kong, Macao and Malaysia. It also has a growing network of sales channel partners (500 channel partners and 2,000 certified sales technology partners). Its strategic partnerships include Huawei, New H3C Group, Dell and Microsoft.

- Reference customers for EISOO appreciated the outstanding quality of certain AnyShare capabilities. These included its online collaborative forms for financial service workers, file analysis, open APIs and integration capabilities.

Cautions

- EISOO's geographical coverage, marketing and sales strategy is limited outside its native Chinese and Asia/Pacific markets. It has minimal or no capabilities in some regions, either directly or through third parties.
- EISOO is not certified for major regional regulations, such as the U.S.'s Health Insurance Portability and Accountability Act (HIPAA) and Payment Card Industry (PCI), and the EU-U.S. Privacy Shield. Also, it does not provide specific functionality for GPDR compliance, such as a sensitive data leakage automatic-monitoring function.
- Reference customers for EISOO reported that the web management console of AnyShare is too complex to properly guide IT administrators. AnyShare's mobile and web clients are also not optimized, which impairs the user experience.

Google

Google (<https://www.google.com/drive/>) is a public company, founded in 1998, with headquarters in Mountain View, California, U.S. and offices worldwide. Google has product offerings across the enterprise and consumer markets. Google Cloud, including G Suite, is aimed specifically at enterprises, and has a focus on transforming IT operations and increasing employee efficiency.

Google's CCP product is Google Drive, a public cloud offering available as a stand-alone platform or bundled within Google's G Suite cloud office offering. Google Drive provides file-based content services for all file types and native G Suite content such as Google Docs, Sheets and Slides. It offers secure and intelligent content collaboration for individuals and teams, via applications available on the web, mobile devices and the desktop client. The Google Drive File Stream service enables streaming of files on demand, from the cloud to the desktop. Google Drive contains comprehensive administrative functions and strong content security controls, including native DLP and information rights management capabilities.

Google Drive (like G Suite) is available either directly from Google or via Google's extended partner network of ISVs, global system integrators and technology partners. These provide additional product and professional services. Google targets midsize and large multinational enterprises across multiple industries. It has limited but growing momentum in areas where regulated content is a high priority.

Google is a good choice for organizations that are prepared to embrace a full cloud delivery model, and ready to change the tools used for user productivity. The cohesive nature of the user experience across all devices makes it good for organizations that support a large population of mobile knowledge workers. For organizations that have already invested in G Suite, Google Drive is a natural extension. The stand-alone component also represents a flexible addition, and is good value for organizations looking to avoid vendor lock-in with their productivity tools.

Strengths

- Google's vision is to deliver tangible productivity benefits when organizations move to Drive. It uses its considerable expertise in AI technologies to deliver automated productivity capabilities within Drive and G Suite. During the past 12 months, new features have been added to Google Drive, and more are on the roadmap – for example, Quick Access (a function that suggests files deemed most likely to be needed next) and natural-language search.
- Organizations can easily migrate their content to Google Drive and G Suite with AppBridge technology (acquired in 2017). This is integrated into G Suite and enables migration from file systems and legacy content management sources, including source system permission structures. The integrated nature of G Suite allows for end-to-end reporting on the process, and proactive suggestions about how to execute the migration.
- Ease of use, simplicity and the cohesive nature of the user experience across devices and applications are recurring themes in the feedback from reference customers for Google Drive.

Cautions

- Google has only a public cloud offering, which is not viable for organizations not yet ready to make the transition to a public cloud. AppBridge enables easy migration of enterprise content to Google Cloud, but Google offers limited support for integrating content sources that an organization wants to keep on-premises or in other cloud-based systems. Some CCP competitors have hybrid options, which allow federation of data sources into a common access point.
- Google Drive's central source of content can be an issue in regulated industries that have stringent governance requirements. Current limitations relate to system validation in a cloud-only environment, data residency, and simplistic records management and information governance.
- Google Drive customers have indicated that the management of information stores can become challenging. Google Drive offers personal drives and team drives, which serve different needs. However, users have expressed the need to lay out design principles for how to use these most effectively. When this is not done, folder taxonomies can become complex to navigate, and information can therefore become difficult to locate. A lack of metadata in the current version of the product compounds this issue.

HighQ

HighQ (<http://www.highq.com/>) is a private company, founded in 2001, with its headquarters in London, U.K. and additional offices in Australia, Germany, India, Netherlands and the U.S. HighQ brings to the market two products that address content service requirements: Collaborate and Publisher. These products are built on the HighQ platform. Together, they cover a broad spectrum of content service use cases, including creation, collaboration, management and publication.

HighQ's CCP is Collaborate, an offering available in a hybrid cloud solution and a SaaS-based solution. Within the SaaS solution, each client has a separate HighQ platform instance, with no multitenant sharing at the platform level. Data residency is available in multiple regions, covering Asia/Pacific, Europe and the U.S. The hybrid solution allows customers to store their files on-premises, with the application layer running in a HighQ data center. However, an on-premises version is currently not available. HighQ Collaborate has a broad set of features covering core CCP capabilities such as content sharing and synchronization, along with project management workflow and social capabilities. In

addition, HighQ provides a unique feature that enables users to manage structured data and metadata within a spreadsheet-like user interface.

HighQ sells its products directly or via partners. In 2017, HighQ established a global partner network of resellers, and it has added a range of midsize partners to its portfolio during the last 12 months. Historically, HighQ has targeted the legal and professional services sectors, and many of its initial partnerships reflect this background.

HighQ is a good choice for organizations looking to provide a content collaboration experience in complex environments – for example, those that need to develop business logic to manage, track and process content in a more structured way. This capability competes with other vendors' products that offer portal support, such as Microsoft SharePoint.

Strengths

- HighQ's vision and feature set span the entire content life cycle. Its portfolio's products allow customers to create, manage, distribute and publish content. Additionally, they support metadata and workflow capabilities that are fairly advanced for the CCP market.
- HighQ maintains a strong focus on information privacy and security. It has inbuilt DRM, robust granular permission management, and clear dashboards for user-managed privacy and security controls. In addition, it has extended its certification to include HIPAA, FISMA, PCI Data Security Standard (DSS) and FedRAMP.
- Configuration simplicity and setup simplicity were frequently identified by HighQ's reference customers as highlights. These attributes enable clients to quickly set up new initiatives and serve different user constituencies.

Cautions

- HighQ lacks native integration with some content sources, such as Documentum, although it provides support through SeeUnity. The broad scope of HighQ's product offers limited flexibility for deployment into other line-of-business applications.
- HighQ's offering lacks the scale and industry diversification of those of the Leaders in this market. Customer deployments are relatively small and mostly focused on one industry. Most clients are in the legal sector.
- A number of reference customers for HighQ indicated that its DRM features can restrict the usage and effectiveness of other capabilities within the system, including full-text search.

Microsoft

Microsoft (<https://onedrive.live.com/about/en-us/business/>) is a public company, founded in 1975, with headquarters in Redmond, Washington, U.S., and offices worldwide. It is a global player in enterprise software and services, and a leader in the productivity, collaboration and communications sectors. It offers cloud operations on a global scale, with security and compliance.

Microsoft's CCP offering is OneDrive for Business, an integral part of Microsoft Office 365. OneDrive is tightly integrated with Office 365 workloads, such as those of SharePoint and Teams, and is a central

piece in Microsoft's cloud office suite. It enables "anywhere access" to any files, and consistent productivity and collaboration experiences for its users. More importantly, OneDrive for Business is now the default location for the save mechanism in the latest Office applications – driving a lot of potential usage. OneDrive is also available as a stand-alone product, either as a cloud service or on-premises.

OneDrive includes a sync client for any file format, enabling unified file-centric experiences on desktops, browsers and mobile devices. It also provides a viewer for 320 file types, and video streaming. Through the Microsoft Graph API, custom applications can retrieve and access content stored in OneDrive and Office 365. Microsoft Flow enables simple approval, feedback and other document workflows.

Microsoft runs a global support operation and cloud data centers, and offers extensive security features in Office 365, OneDrive and Azure. Global data centers enable regional data residency and compliance with privacy regulations, including GDPR. Also, Microsoft offers content migration to Office 365 through FastTrack services, together with qualified partners, as part of the regular subscription. OneDrive can be deployed as part of the Office 365 suite or in a hybrid capacity, together with SharePoint 2016. It can also be deployed on-premises in SharePoint 2013, SharePoint 2016 and upcoming SharePoint 2019 deployments. Organizations often adopt OneDrive as part of an Office 365 initiative.

The rapid adoption of Office 365 fuels interest in OneDrive across small, midsize and large organizations. Buyers want to use all the cloud services and storage available in the deployed office suite.

Microsoft is a good choice for companies that have already prioritized investment in its products. It suits organizations that aim to use an integrated, cloud-based platform to enable digital workplace scenarios.

Strengths

- Microsoft envisages the evolution of content collaboration from traditional knowledge workers to frontline and field workers. Through Windows Mixed Reality devices, such as HoloLens, immersive and augmented content-related experiences can be realized, enabling modern training and maintenance scenarios.
- The Microsoft Graph adds intelligence to content stored in OneDrive and other Office 365 data applications. It enables deep insight into content that can enhance the user experience through smarter interactions. Microsoft Flow, by using the Microsoft Graph, can help automate content management and processing tasks.
- Reference customers for Microsoft reported that OneDrive is very easy to use and provides many features for getting organized and collaborating with others. Most reported that OneDrive deployment was easy and efficient, and that it brought operational efficiency after rollout.

Cautions

- Microsoft's vision for OneDrive is tightly linked with Office 365, and less focused on integration with third-party business applications outside Microsoft's ecosystem. OneDrive lacks native connectors to various enterprise content repositories and applications. Organizations can mitigate this shortcoming if their enterprise systems provide native connectors to SharePoint (the back end of OneDrive).

- OneDrive offers limited support for external collaboration. It does not have a separate workspace with a dedicated domain and repository, although SharePoint and Teams can be used for that purpose. Joint initiatives between different organizations (such as a consortium), for example, require a dedicated team or project area that is accessible only by authorized members, with a separate repository and data governance.
- Reference customers for Microsoft indicated that additional costs for cloud storage may emerge after deploying Office 365.

ownCloud

[ownCloud \(https://owncloud.com/\)](https://owncloud.com/) is a private company, founded in 2011, with headquarters in Nuremberg, Germany. The ownCloud offering is built on open standards and designed to deliver frictionless, secure access to content in a federated manner across decentralized ownCloud instances. The company offers flexible deployment of services to enhance productivity and collaboration across content stores via a logical integration layer and intuitive user interfaces.

The ownCloud CCP product offers intuitive file sharing and syncing experiences via web client, mobile and desktop syncing applications. It supports collaborative editing of Microsoft Office files via Collabora Online. It supports lightweight workflow via syncing and external sharing features, and supports branding of the front-end interfaces. The ownCloud platform offers two-factor authentication and policy-managed file access management based on classification and regions. For example, files labeled as "confidential" in Europe cannot be accessed from a browser in China. Its federated file storage support allows users to access files across Microsoft Windows network drives, Microsoft SharePoint, FTP servers, object storage (such as Amazon Simple Storage Service [S3]) and public cloud services (such as Google Drive, Microsoft OneDrive, Dropbox and other Web Distributed Authoring and Versioning [WebDAV]-enabled services).

The ownCloud enterprise offerings are sold directly in the EU, and via a network of technical service partners and resellers in other regions. Its direct sales are focused on key industries that have traditionally prioritized added security, data residency and flexible architectural options. ownCloud is only available for cloud deployment (public, private or hybrid), but can interact with both on-premises and cloud-based storage and services. It is sold using a subscription-based, named-user model.

An open-source foundation enables ownCloud experiences to be enhanced and customized with numerous community-developed applications and extensions. Its federated services architecture for interfacing and managing content across repositories is a differentiator. The open-source fair-use license enables ownCloud to offer a "guest user" feature for external editing of, and collaboration on, specific files without issuing a license.

ownCloud is a good choice for customers that require federated CCP services across distributed content environments and are looking for open-source technology. It is popular with customers in the technology, government and financial sectors. Its largest market is the EU, as it appeals to customers looking for non-U.S.-based data centers with metadata control planes. The regional footprint of ownCloud is expanding to the U.S. It has gained the attention of key industry clients looking for additional centralized management and protection of content throughout diverse environments.

Strengths

- ownCloud's architectural flexibility — based on private cloud and on-premises implementation, with federation and of data sources — is a differentiator. Its vision prioritizes provision of data residency and metadata handling in data center locations of the customer's choice (specifically U.S. or non-U.S. data centers). This makes it attractive to global customers sensitive about data management.
- As the largest open-source vendor in the CCP market, ownCloud attracts an underreported customer segment. Expansion outside the EU, and converting fair-use users into paying users, are significant opportunities for ownCloud.
- Reference customers for ownCloud scored their overall experience and the value of the product highly. They specifically praised the strong user community and the product's flexibility to drive innovation as key benefits.

Cautions

- ownCloud has not historically focused on integrations with common business productivity tools outside the open-source communities, including Microsoft Office 365 and Google G Suite. It is in the process of building these integrations. Its workflow capabilities are limited to external syncing, sharing and editing.
- ownCloud has limited local presence in the U.S. at present, but it recently opened a U.S. branch office that launched sales, presales and support operations on 1 July 2018. In Asia/Pacific, ownCloud sells only through resellers. Customers in these regions will need to seek out channel support for ownCloud.
- Some reference customers for ownCloud found on-premises deployments complex and dependent on the enterprise infrastructure. To speed up configuration, they recommend planning, drawing on community resources and using puppet scripts (see Note 3).

Thru

Thru (<http://www.thruinc.com/secure-mobile-file-sharing/>) is a private company, founded in 2002, with its headquarters in Irving, Texas, U.S. It has additional offices in North America, Australia, Europe and India. Thru's origins lie in the MFT and FTP markets. It later expanded into enterprise file-sharing services, which became the company's focus. Thru aims to support organizations with large and complex file-sharing needs by meeting users' file syncing and sharing needs.

Thru's CCP is called the File Exchange and Collaboration Platform. It is based on a service-oriented architecture with extensive APIs for integrating with multiple repositories and applications. It can be deployed in public, private or hybrid clouds, or on-premises. In hybrid configurations, data files can reside in a third-party cloud. File transfer performance is enhanced by Thru's OptiSPEED high-speed transfer and OptiBAND bandwidth management technologies. Thru also provides WAN optimization, cloud routing across global data centers and back-end regional syncing. Its front-end experiences are supported by client apps that focus on collaboration, workflow, mobile productivity, enhanced Microsoft Outlook integration and offline syncing capabilities. Add-ins extend Thru's collaboration with business apps such as Salesforce Platform, and Microsoft SharePoint and Office 365. Thru OptiFLOW and OptiPaaS support B2C and B2B collaboration and external file sharing. Thru has direct sales and support operations in North America, and uses its partner channel and system integrators in other regions.

Thru is a good choice for midsize and large organizations aiming to optimize and secure file exchange and collaboration with external parties, across any device, repository or application. It offers good support for use cases involving file exchange across multiple applications (such as CRM, ECM and ERP applications), in both B2B and B2C scenarios. Thru is also suitable for use cases that need to send large files to geographically distributed locations with low-bandwidth downloads and uploads. It attracts organizations in sectors that have complex file security and sharing needs. These include the high tech, arts and entertainment, mining, oil and gas, financial services, and merchant marine and cruise industries.

Strengths

- Thru enables flexible deployment, integration with external repositories and technologies, and optimized routing and transfer of large files — over low-bandwidth connections and long distances. This is a differentiator in the CCP market.
- Thru's focus on security-oriented, flexible architectures, optimization technologies and extensibility is attractive for the more complex file transfer and external business use cases that require collaboration capabilities.
- Reference customers for Thru scored their experiences very highly. They highlighted the depth of skill and knowledge of Thru's direct support and implementation teams.

Cautions

- Thru's user experience is highly dependent on its Microsoft Outlook plug-in. The web interface is older and needs refreshing to offer a more modern and adaptive user experience. The lack of plug-ins for Google G Suite and other productivity applications puts the experience Thru offers behind those of many other CCP vendors.
- Thru's overall viability is diminished by its very small market share and financial burdens stemming from legal matters. This limits Thru's ability to invest in its product and grow its market presence outside North America.
- A lack of direct sales and support teams outside North America affects Thru's regional customers, as in these areas it depends on the skills and knowledge of its channel partners. Customers needing localized support do not benefit from an interested local community and must evaluate Thru's reseller and channel partners well.

Vendors Added and Dropped

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

Added

- CodeLathe.

EISOO.

- ownCloud.

Dropped

- **Accellion** — This vendor has repurposed its product offering to focus on file transfer and no longer prioritizes CCP capabilities. Without an official CCP offering, this vendor did not qualify for inclusion in this Magic Quadrant.
- **Intralinks by Synchronoss** — This vendor has repurposed its product offering to provide VDRs; it no longer sells a CCP. Without an official CCP offering, this vendor did not qualify for inclusion in this Magic Quadrant.

Inclusion and Exclusion Criteria

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

- **Offering:** The vendor had to have a stand-alone CCP offering for business, based on core file syncing and sharing capabilities.
- **Commercial availability:** The CCP product had to have been generally available since 1 September 2017.
- **Packaging:** The CCP product had to be available as a separately billed, stand-alone product. CCP capabilities alone, bundled with a different product from the same vendor, were considered extensions and were insufficient for inclusion.
- **Business performance:** The vendor's CCP-related product and service revenue for 2017 had to be more than \$20 million. Alternatively, it must have had at least a 40% growth rate from 2016 to 2017. This had to be demonstrated and certified by a company financial officer.
- **Total users:** Each vendor had to have at least 500,000 active users among all the organizations licensed to use its product.
- **Installed base:** The total number of customer organizations had to be higher than 150. Twenty percent of deployments had to be demonstrated to be of over 1,000 seats and at least one deployment had to have 10,000 users.
- **Geography:** Each vendor had to demonstrate an installed base and presence outside its home geographic region, along with localized support provided through its own offices and resources or those of third parties.
- **Reference customers:** Five reference customers must have deployed the service or product for a minimum of six months, and have at least 1,000 paid users. Two of the reference customers must have had at least 5,000 paid users.

In addition, vendors' CCP offerings must support a range of functionality:

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

- **File sharing:** Support for multiple levels of file (and folder) sharing. This includes sharing between people inside and/or outside the organization.
- **File access:** Access from a client application or browser to files stored in on-premises or cloud repositories. This may be implemented as direct access to the file or a copy to an internal repository. Use of third-party connectors is acceptable, but native support is scored higher.
- **User productivity:** This includes document view, editing and annotation in mobile, desktop and browser applications, through either embedded native capabilities or third-party tools (such as cloud office or CRM tools).
- **Mobility:** Including a native application for both iOS and Android.
- **PCs:** This includes support for synchronization on Windows PCs and Mac OS computers through a native stand-alone application, a web browser or email client plug-in. Support for Linux platforms is optional.
- **Security:** Including password authentication, lockout after a period of inactivity, selective remote wiping of the app and related files on a device; also data encryption at rest and on transfer and in the cloud.
- **Management:** Integration with Lightweight Directory Access Protocol (LDAP) and Active Directory for authentication, single sign-on, group policies and centralized management tools. This allows administrators to manage synchronization and control content, access rights and user activity. Integration with enterprise mobility management is optional.
- **Integration:** Must support at least one type of integration with corporate data repositories, on-premises or in the cloud – for example, network file shares, cloud repositories, content managers and applications – or data infrastructure such as network-attached storage.
- **Platform:** Must be a service-led platform offering with APIs, navigators, documentation, development tools and application management.
- **Delivery model:** Availability of cloud services in public or private clouds. Also, support for hybrid architectures, combining on-premises repositories and private and public repositories with cloud-based CCP functionality.
- **File synchronization:** Support for transparent and automatic round-trip data synchronization between devices and the cloud service/server, or across multiple devices, for selected files or folders.

Features provided by partners had to be tightly integrated with the vendor's product.

Product functionality for each vendor in this Magic Quadrant will be evaluated in detail in a future "Critical Capabilities for Content Collaboration Platforms."

Honorable Mentions

The CCP market has dozens of vendors because it represents a subset of a broader landscape including vendors with file sync and share capabilities. Among the vendors that did not qualify, many failed to fulfill the inclusion criteria for CCP revenue or growth, number of customers, subscribers and size of

deployments. Many vendors with file sync and share capabilities do not have a complete CCP offering as they lack collaboration or platform features.

CCP vendors that do not appear in this Magic Quadrant but that are worthy of consideration include:

- **AeroFS (Redbooth):** Provides an on-premises CCP with peer-to-peer technology and a central virtual appliance for management. A complementary product, Amium, enables content collaboration. Unfulfilled criteria: cloud CCP offering and revenue.
- **Amazon:** Provides Amazon WorkDocs, a complete CCP offering, as part of AWS. It targets the small and midsize business market, with small implementation sizes. Unfulfilled criterion: deployment size.
- **Boole Server:** Provides military-grade secure cloud file synchronization and sharing products. Unfulfilled criteria: revenue, installed base and deployment size.
- **Datto:** Provides a variety of products to support small and midsize businesses with IT services, through managed service providers. It offers file sync and sharing and collaboration through Workplace, a CCP offering based on technology acquired from Autotask and Soonr. Unfulfilled criteria: revenue and deployment size.
- **Egress Software Technologies:** Enables file sharing and collaboration with email encryption, file transfer and secure collaboration. This is delivered via its flagship CCP solution, Egress Switch. Unfulfilled criterion: revenue.
- **Huddle:** Provides a CCP offering that also includes document and project management capabilities. Huddle specializes in serving government organizations. Unfulfilled criterion: revenue.
- **IBM:** Provides IBM Connections Files on Cloud, an integral component of the Connections Cloud family. As an extension of IBM Connections, IBM Connections Files on Cloud did not qualify for inclusion in this Magic Quadrant. Unfulfilled criterion: stand-alone package.
- **TeamDrive:** Provides secure file sync and share and collaboration, cloud storage and backup. Unfulfilled criteria: revenue and number of customers.
- **Tresorit:** Provides secure file sharing, team folder collaboration and cloud storage. Unfulfilled criteria: number of customers and installed base.
- **Vaultize:** Provides a CCP and secure access to corporate data with mobile content management and DLP. Unfulfilled criterion: revenue.

Evaluation Criteria

Ability to Execute

Gartner evaluates a vendor's Ability to Execute by the quality and efficacy of its processes, systems, methods or procedures. These should enable a vendor's performance to be competitive, efficient and effective, and should positively impact its revenue, retention and reputation (in light of Gartner's view of the market). In the CCP market, large cloud providers and IT players with mature presence across regions and sectors normally have strong Ability to Execute. Smaller vendors, with limitations in terms of

company size, customer base, international presence and/or channels, or high-risk profiles (such as new ventures), tend to be limited in their Ability to Execute.

Table 1: Ability to Execute Evaluation Criteria

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

Source: Gartner (July 2018)

For more details of the criteria, see the Evaluation Criteria Definitions section. The Overall Viability, Operations and Customer Experience criteria are highly relevant for buyers assessing new players' Ability to Execute. The Product or Service criterion is highly relevant for buyers who want to assess how well their IT suppliers are evolving traditional products to meet CCP requirements.

Completeness of Vision

The CCP market originated from consumerized technology trends, initially focusing on enterprise file synchronization and sharing (EFSS). Vendors then evolved to address content collaboration, content management, workflow automation and other capabilities. Vendors originating from consumer markets naturally understand the priorities of the digital workplace, centered on simple user experiences, mobile working and cloud agility. From there, they adapted strategies and evolved their offerings to address specific enterprise priorities, such as security and data governance. Vendors with IT backgrounds, by contrast, understand the IT organization's priorities (such as IT administration and back-end integration). However, they had to redesign their offerings to meet users' expectations, which are for hiding IT complexity and getting a consumerlike experience. Buyers of CCP offerings need to consider a broader digital workplace scenario. They should identify priorities and constraints, align their plans with the CCP market's dynamics and make decisions for long-lasting investments in this market.

File synchronization and sharing capabilities are central to these products and have been standardizing across products over time. But still, performances are quite variable across vendors. On top of that, CCP vendors have built specialized capabilities, such as for data protection, collaboration, content creation and business workflow. The Offering (Product) Strategy criterion is highly relevant for buyers aiming to identify vendors with a long-term vision that aligns with their company's objectives.

Table 2: Completeness of Vision Evaluation Criteria

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

Source: Gartner (July 2018)

For more details of the criteria, see the Evaluation Criteria Definitions section.

Quadrant Descriptions

Leaders

Leaders provide mature offerings that meet market demand. They have demonstrated the vision necessary to sustain their market positions as requirements evolve. The hallmark of Leaders is that they focus and invest in their offerings in order to lead the market and affect its overall direction. Leaders can be the vendors to watch as you try to understand how new offerings might evolve. Leaders typically possess a significant, satisfied customer base, and they enjoy high visibility in the market. Their size and maturity enable them to remain viable under changing market conditions. Leaders typically respond to a wide market audience by supporting broad market requirements. However, they may fail to meet the specific needs of vertical markets or other more specialized segments.

Challengers

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

Visionaries

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

Niche Players

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

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

Context

This Magic Quadrant evaluates vendors that met Gartner's inclusion criteria for the CCP market. It is intended to facilitate selection decisions about vendors and products. Application leaders in charge of content service strategies should study this document. They should evaluate vendors in any of the four quadrants, based on vendors' alignment with their requirements and goals.

In pursuit of broader digital workplace and digital transformation initiatives, organizations want to promote new work styles, approaches and paradigms — and increasingly optimize business processes. CCPs connect and empower people, enabling new productivity, collaboration and efficiency. Also, thanks to easy deployments and adoption, CCPs enable data infrastructure modernization. CCPs can drive change in people's work styles and processes, help meet business priorities and grant security and compliance.

A survey of Gartner Research Circle members was run in the fourth quarter of 2017. It found that CCPs are among the areas of content services that organizations plan to use by the beginning of 2019. The level of interest is much higher than for other, more traditional technologies.

Another survey of Gartner Research Circle members was executed in the same period. It found that the top priorities for CCPs include CCP application enablement, implementation and migration of files from legacy repositories, and collaboration capabilities. Security, data protection and compliance in particular with GDPR regulation also featured.

Gartner estimates that the CCP market's revenue reached \$3.3 billion in 2017, and grew by 24% from 2016. Gartner forecasts that it will top \$8 billion by 2022.

The driving forces behind CCP adoption in the enterprise market are as follows, in summary:

- **Mobility:** Mobile and remote workers continue to increase in organizations. Across different roles and functions, business users demand smart tools to access content and applications. They want to be able to work and collaborate productively using any device, anywhere.
- **Cloud:** Adoption of cloud services for storage, cloud office, productivity and collaboration is growing as organizations realize benefits.
- **Security and compliance:** Security risks associated with digital transformation require support for data protection, regulatory compliance, data residency and ownership. GDPR is forcing organizations to gain control over traditional unstructured content (see "Get Ready for the Impact of GDPR on Content and Collaboration").
- **Content management:** Organizations are reconsidering investments in traditional on-premises, siloed content repositories, in light of cloud-based modern alternatives, including CCPs.
- **Infrastructure modernization:** IT organizations are rethinking traditional enterprise network storage infrastructure, which is often fragmented and distributed, and adopting flexible CCP approaches.
- **Digital workplace initiatives:** Organizations are aiming to transform people's work with modern, engaging tools, including CCPs as core pieces of a renewed IT service portfolio.

Common user scenarios driving interest in CCP products are:

- **Workforce productivity:** Enabling access to enterprise content repositories from any device, content synchronization and sharing, and content editing, to boost users' productivity.
- **Extended collaboration:** Enabling team collaboration for internal and external users, with, for example, workspace, team folders and collaborative document creation, along with appropriate data protection.
- **Centralized data protection:** Enabling extended collaboration with policy management, access controls, e-discovery and audit trails. This is typical of regulated scenarios with compliance requirements, such as in the legal and finance sectors. It often includes VDR or board portal requirements.
- **Lightweight workflow:** Enabling document-centric task and process automation, triggering actions on given events.
- **Infrastructure modernization:** Replacing redundant or fragmented data infrastructure with public or private cloud elements to enable modern productivity and collaboration scenarios.

Market Overview

As noted earlier, CCPs originated from the EFSS market, which emerged in 2010 and has evolved over the past eight years. This market has been going through a period of commoditization and evolution of vendors' value propositions, due to intense competition. These trends have driven market consolidation and forced vendors to look beyond file synchronization and sharing. They have expanded into content-driven collaboration for individuals and teams, secure external collaboration, lightweight content

management and file-centric workflows. From an initial application focus, these products have evolved into content platforms with publicly available APIs for integration, customization and extension.

Various capabilities have been added to CCPs to enhance team collaboration, from cloud office suite integration to native collaborative cloud authoring that challenges the traditional definition of a file-based document (as with Box Notes and Dropbox Paper, for example). CCPs often support conversation-driven collaboration styles through integration with workstream collaboration platforms (such as Slack, Microsoft Teams, Workplace by Facebook and Spark).

CCPs offer now more support for structured content services, data governance and content management. This provides alternative options, beyond traditional CSPs, for use cases that range from systems of engagement to systems of record (see "Give Content Collaboration Platforms a Bigger Role in Your Content Services Strategy"). CCPs support simple content management use cases or replace traditional enterprise content management systems where simpler metadata modeling, retention management and business processing are required.

Some vendors in this Magic Quadrant have similar characteristics:

- Some vendors — Google and Microsoft — offer a CCP as part of a cloud office suite, with native content creation and collaborative authoring capabilities and a focus on productivity and internal collaboration.
- Some vendors — Box, Dropbox — focus on their own cloud-based content repository and storage, offer broad APIs for customizations and business integrations, are agnostic about cloud office suites, and prioritize external sharing and collaboration.
- Some vendors — Axway (Syncplicity), Citrix, CodeLathe, Egnyte, EISOO and ownCloud — have hybrid architectures for infrastructure modernization that enable customers to preserve existing content repositories and avoid migrating to the cloud.
- Some vendors — Citrix and HighQ — specialize in centrally controlled team collaboration environments to support regulated scenarios and specific use cases, such as virtual deal rooms.
- Some vendors — Axway (Syncplicity), CTERA and Thru — specialize in large file transfer optimization and MFT.

Emerging capabilities are transforming the CCP. A unified content platform and APIs enable content access and retrieval to feed applications and automate processes. Machine learning functions enable automation of content tagging and classification (see "How to Boost Artificial Intelligence With Content (and Vice Versa)"). CCPs will not only remain central to digital workplace initiatives, but also become increasingly relevant for strategic digital transformation initiatives. Future evolution of these products toward digital transformation and digital business enablement could accommodate blockchain and Internet of Things scenarios.

GDPR is a big theme for organizations in 2018 (see Note 1). Some CCP vendors have invested in this area over the past 18 months and addressed requirements to enable compliance. CCPs help organizations gain control over unstructured data and meet GDPR requirements for personal data (see "Get Ready for the Impact of GDPR on Content and Collaboration").

Organizations currently consider CCP offerings mostly for user productivity, external collaboration, agile data infrastructure and centralized governance. However, as they increase their investments in digital transformation initiatives, CCPs will gain more traction as enablers of content services. CCPs will continue to grow, and will force organizations to reconsider traditional approaches to collaboration and content management.

The CCP market is already growing in a much broader area that overlaps with markets related to enterprise content and enterprise collaboration technologies. CCP vendors are building integrations with products in these other markets, while selectively deciding to implement their own native capabilities. The most relevant overlaps are with:

- **Cloud office suites:** CCPs are often deployed jointly with a cloud office suite. The CCP is seen as a best-of-breed technology to cover the specific requirements of complex use cases that cannot be addressed by cloud office suites alone.
- **CSPs:** CCPs are often integrated with traditional CSPs; in some cases, they may even replace them.
- **Workstream collaboration products:** CCPs are sometimes integrated with workstream collaboration products such as Slack and Workplace by Facebook that focus on conversations (see "Embrace Workstream Collaboration to Transform Team Coordination and Performance").
- **Cloud document creation:** This is an emerging market based on cloud document services, with a focus on real-time collaborative editing. It may disrupt the traditional notion of "file" and "content." Vendors in this market include Evernote, Google (with Google Docs) and Quip.

CCP and CSP products are different from workstream collaboration and CDC products, but vendors of CCPs and CSPs are increasingly pursuing integration with workstream collaboration and CDC products. We expect that the CCP market will continue to evolve over the next few years, with specialization in capabilities complementary to those of the dominant cloud office suites. CCP vendors will continue to increase the competitive pressure on vendors in the neighboring CSP market, forcing them to further evolve their offerings into new areas, such as business process modeling. CCP vendors have an opportunity to continue to drive transformation across these content-related markets and pursue growth in broader digital transformation initiatives.

Note 1

GDPR

On 25 May 2018, the General Data Protection Regulation ([GDPR \(http://ec.europa.eu/justice/data-protection/reform/index_en.htm\)](http://ec.europa.eu/justice/data-protection/reform/index_en.htm)) regulation took effect as a new European privacy law. It affects all organizations and markets. GDPR focuses on personal data privacy and imposes rules on companies, government agencies, nonprofit organizations and other organizations that offer goods and services to people, or that collect and analyze data tied to EU residents.

Note 2

Digital Workplace

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

Note 3

Puppet

Puppet is an open-source software configuration management tool. It runs on many UNIX-like systems, as well as on Microsoft Windows, and includes its own declarative language to describe system configuration. Puppet provides an automatic way to inspect, deliver, operate and future-proof infrastructure and software.

Evaluation Criteria Definitions

Ability to Execute

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

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

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

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

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

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

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

Completeness of Vision

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

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

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

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

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

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

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

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

© 2018 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. and its affiliates. This publication may not be reproduced or distributed in any form without Gartner's prior written permission. It consists of the opinions of Gartner's research organization, which should not be construed as statements of fact. While the information contained in this publication has been obtained from sources believed to be reliable, Gartner disclaims all warranties as to the accuracy, completeness or adequacy of such information. Although Gartner research may address legal and financial issues, Gartner does not provide legal or investment advice and its research should not be construed or used as such. Your access and use of this publication are governed by [Gartner's Usage Policy](#). Gartner prides itself on its reputation for independence and objectivity. Its research is produced independently by its research organization without input or influence from any third party. For further information, see "[Guiding Principles on Independence and Objectivity](#)."

