

The Forrester Wave™: Enterprise File Sync And Share Platforms — Hybrid Solutions, Q4 2017

The 10 Providers That Matter Most And How They Stack Up

by Cheryl McKinnon
December 12, 2017

Why Read This Report

In our 37-criteria evaluation of enterprise file sync and share (EFSS) hybrid solution providers, we identified the 10 most significant ones — Acellion, Acronis, Axway (Syncplicity), BlackBerry, Citrix, Egnyte, Hitachi Vantara, IBM, Microsoft, and Thru — and researched, analyzed, and scored them. This report shows how each provider measures up and helps enterprise architecture (EA) professionals make the right choice.

Key Takeaways

Microsoft And Citrix Lead The Pack

Forrester's research uncovered a market in which Microsoft and Citrix lead the pack. Egnyte, IBM, Axway (Syncplicity), BlackBerry, and Acellion offer competitive options. Acronis, Thru, and Hitachi Vantara lag behind.

EA Pros Are Looking For Flexible Architectures And Packaged Connectors

The hybrid EFSS market has evolved, moving beyond core file-sharing capabilities. EA pros seek secure file-sharing capabilities with flexible deployment options, including integration with existing repositories, such as file shares of content management applications.

File Security, Collaboration, And Search Are Differentiators

Look for hybrid EFSS vendors that can balance security requirements with usability. Document-centric collaboration, task management, metadata and text search, and support for team workspaces differentiate vendors.

The Forrester Wave™: Enterprise File Sync And Share Platforms — Hybrid Solutions, Q4 2017

The 10 Providers That Matter Most And How They Stack Up



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December 12, 2017

Table Of Contents

- 2 Content And Collaboration Services Shape The EFSS Market's Direction**
 - Hybrid EFSS Solutions Provide A Rich Set Of Deployment Options
 - EFSS Is A Crowded Market — Also Consider Vendors That We Did Not Evaluate
 - Look Beyond Just File Sharing — Collaboration Capabilities Are Key To The EFSS Market
- 6 EFSS Platforms — Hybrid Solutions Evaluation Overview**
 - Evaluated Vendors And Inclusion Criteria
- 9 Vendor Profiles**
 - Leaders
 - Strong Performers
 - Contenders
- 15 Supplemental Material**

Related Research Documents

- [The Five Key Trends For 2017 That Shape How We Manage Enterprise Content](#)
- [The Forrester Wave™: Enterprise Content Management — Business Content Services, Q2 2017](#)
- [The Forrester Wave™: Enterprise File Sync And Share Platforms — Cloud Solutions, Q4 2017](#)



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The Forrester Wave™: Enterprise File Sync And Share Platforms – Hybrid Solutions, Q4 2017

The 10 Providers That Matter Most And How They Stack Up

Content And Collaboration Services Shape The EFSS Market's Direction

Forrester segments EFSS products into two groups: 1) products that support hybrid cloud or on-premises deployments and 2) products that are cloud-based software-as-a-service (SaaS) offerings. Providers of EFSS solutions for hybrid and/or on-premises use cases are investing in secure connectors to existing content stores. Alternatively, cloud-native EFSS providers have invested in the repository and governance capabilities that make them contenders for tomorrow's systems of record for corporate content. When assessing their EFSS requirements, EA pros must take this big-picture content strategy question into account.

Hybrid EFSS Solutions Provide A Rich Set Of Deployment Options

Forrester defines enterprise file sync and share as:

Technologies that allow organizations to share and replicate content across multiple devices, distributing files to employees and/or customers or partners outside the enterprise.

Not all enterprises are interested in cloud-only solutions for their document-centric collaboration or file-sharing needs. Regulations or policies may restrict cloud storage of sensitive information types. Jurisdictions with rigorous data protection and privacy laws may require firms to use in-country data centers. Software decision makers are still concerned over unauthorized access to SaaS applications (see Figure 1). Enterprise architects who manage terabytes — if not petabytes — of documents on network drives, SharePoint sites, or content management applications may object to the migration or duplication efforts required to use all-cloud EFSS solutions.

Hybrid solutions provide:

- › **Integrations and connectors with major systems of record.** Enterprises with investments in content repository systems, whether on-premises or cloud, may not require yet another repository just to fulfill their file-sharing needs. Packaged integrations for SharePoint (on-premises or online), network drives and storage platforms, cloud collaboration tools, or enterprise content management (ECM) systems are available from most hybrid EFSS vendors, eliminating the need to move, migrate, or duplicate content.
- › **Data center and storage flexibility.** Hybrid EFSS vendors have a range of options for file and/or metadata storage and, in some cases, the application itself. Many of the evaluated vendors provide options for regional data centers for companies with data residency requirements. Some vendors also provide options for entirely on-premises deployments. EA pros with a phased approach to cloud adoption, or where cloud services are still on their road maps, can work with these hybrid providers to adopt the right architecture for today and also adapt to future needs.

The Forrester Wave™: Enterprise File Sync And Share Platforms – Hybrid Solutions, Q4 2017

The 10 Providers That Matter Most And How They Stack Up

- › **Partnerships with major public cloud providers.** A number of evaluated vendors partner with one or more major public cloud providers, such as Amazon, Google, or Microsoft Azure. Enterprises that have standardized on a preferred cloud provider can choose to use that provider for file and/or metadata storage and, in some cases, application delivery. Some evaluated hybrid vendors also support partners that can host the EFSS application and related data and files.

EFSS Is A Crowded Market – Also Consider Vendors That We Did Not Evaluate

EA pros with deep investments in existing content applications should also assess those suppliers to see if they meet EFSS requirements. For example:

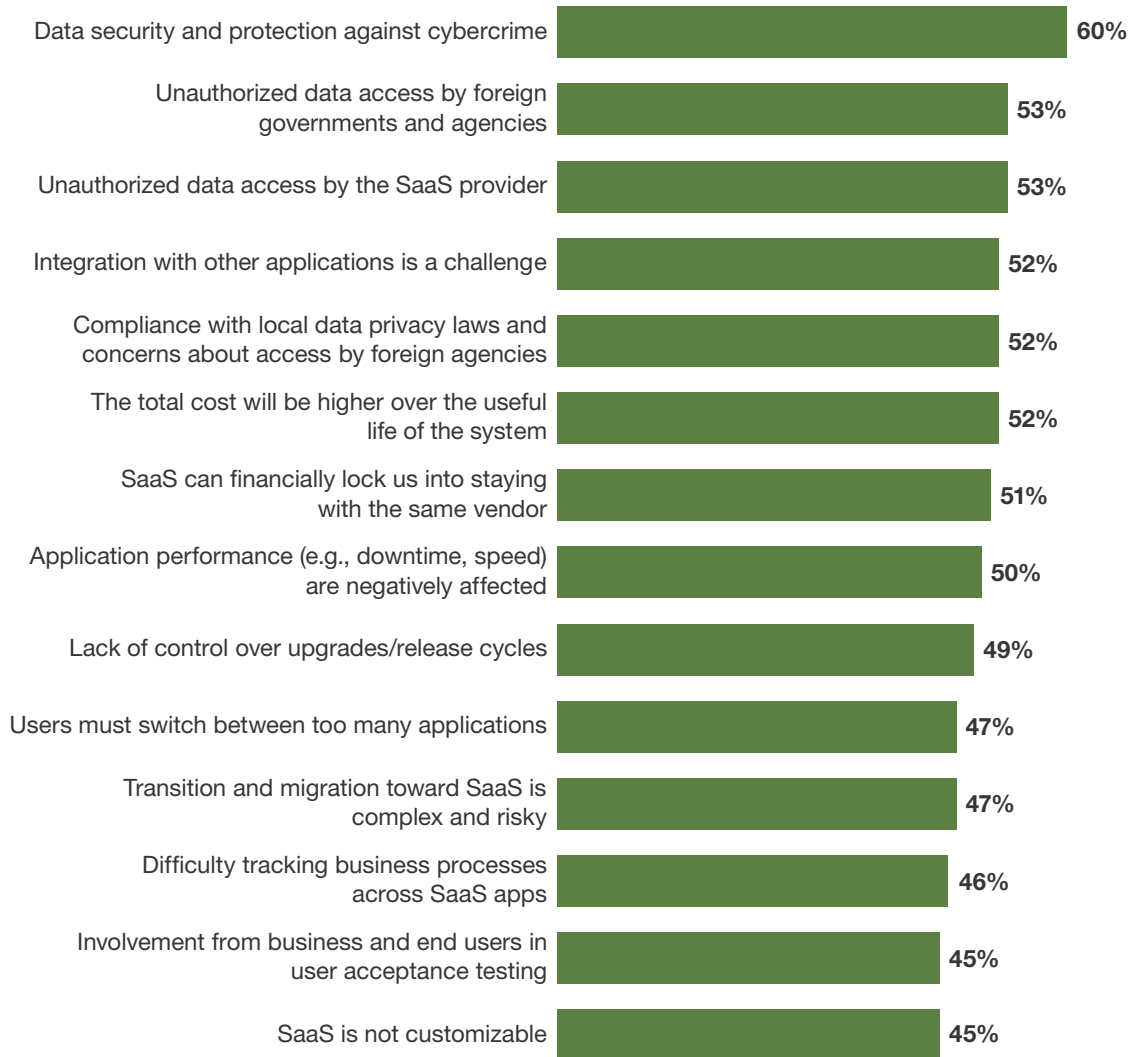
- › **Look at ECM vendors that may support EFSS.** Explore add-ons or extensions to core ECM platforms if file sharing from those repository systems is a priority. Vendors such as Alfresco Software, Hyland Software, iManage, and OpenText, among others, support the secure sharing, syncing, or external collaboration capabilities expected in the EFSS market. A typical limitation of these offerings, however, is the inability to integrate with a broad range of content applications — many integrate only with their own repository systems.
- › **Evaluate vendors with expertise and experience in key verticals.** Vendors offering collaborative or secure information exchange for particular use cases may also offer EFSS capabilities. For example, virtual data room and merger and acquisition (M&A) specialist Intralinks provides cloud file sharing and collaboration.
- › **Consider emerging vendors with broad EFSS capabilities.** Vendors that missed a revenue or market presence inclusion criterion for this Forrester Wave™ may also be a good fit. Vendor CodeLathe offers both a hybrid EFSS product as well as an OEM edition for consumer use cases. Also consider open source options from OwnCloud or NextCloud, as well as newer vendors with a strong regional presence, such as BooleServer and Safe-T in Europe, the Middle East, and Africa.

The Forrester Wave™: Enterprise File Sync And Share Platforms – Hybrid Solutions, Q4 2017

The 10 Providers That Matter Most And How They Stack Up

FIGURE 1 Concerns Over Unauthorized Access To SaaS Applications Linger For Some Tech Decision Makers**“How concerned is your firm with the following potential issues around using software-as-a-service (SaaS)?”**

(4 or 5 on a scale of 1 [not concerned] to 5 [concerned])



Base: 3,582 global software decision makers

Source: Forrester Data Global Business Technographics® Software Survey, 2016

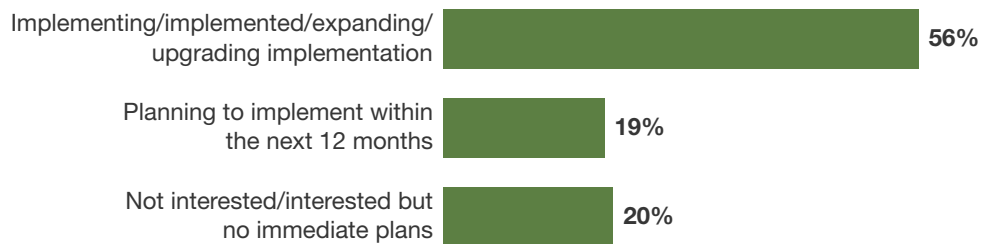
The Forrester Wave™: Enterprise File Sync And Share Platforms – Hybrid Solutions, Q4 2017

The 10 Providers That Matter Most And How They Stack Up

Look Beyond Just File Sharing – Collaboration Capabilities Are Key To The EFSS Market

Forrester Data indicates that more than half of businesses have adopted secure file-sharing and collaboration tools, with a further 19% planning to do so in the next 12 months (see Figure 2). While hybrid deployment models will continue to serve firms that are not ready for full cloud applications, expect this segment to grow slowly. While only 4% of organizations fully or almost fully rely on SaaS for ECM now, 31% currently use SaaS to complement on-premises systems. An additional 23% expect to fully or almost fully use SaaS by 2018 or 2019.¹ Simple file sharing alone has become table stakes. Toward this end, EFSS providers must enable:

- › **Delivery of granular, web, and mobile-friendly content apps.** EA pros must evaluate EFSS providers that offer flexible user interfaces, packaged integrations with mainstream enterprise apps, and rich APIs. Configurable or customizable apps can accelerate employee engagement and enhance customer experience.
- › **Secure document processes that embrace the extended enterprise.** Organizations that are serious about digital transformation efforts know that new and established business models depend on trusted networks of customers, citizens, partners, suppliers, or regulators. Digital business means these extended enterprise roles are increasingly active participants in the document creation, review, and approval processes. Architectures and licensing models to embrace these external players are now essential. Watch for vendors to further invest in the auditing, analytics, and rights management to extend these use cases.
- › **High-performance document exchange that includes very large files.** B2B EFSS use cases often include the need to exchange, review, and revise large files such as video marketing assets, computer-aided design (CAD) or other engineering formats, or archived structured data sets. Email inbox limitations or concerns over the security of attached files open the door to EFSS as a file exchange replacement. The ability to mark up, annotate, approve, or otherwise comment on these files means embedded collaboration and task management tools are desirable.

FIGURE 2 Fifty-Six Percent Of Global Businesses Have Adopted Secure File-Sharing Technologies**“What are your firm’s plans to adopt following data security and information risk management technologies: secure file sharing and collaboration?”**

Base: 1,044 global client security decision makers at firms with 20+ employees

Note: We excluded responses of “Don’t know.”

Source: Forrester Data Global Business Technographics® Security Survey, 2017

EFSS Platforms — Hybrid Solutions Evaluation Overview

To assess the state of the hybrid EFSS market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top hybrid EFSS vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 37 criteria, which we grouped into three high-level buckets:

- › **Current offering.** We assessed the technologies based on the breadth of the tool set, with particular emphasis on architecture, library services, collaboration, security, and usability capabilities (including choice of data centers and integration with existing content stores). We surveyed customers to get firsthand observation of the strength of particular capabilities, and we tested each vendor’s offering with at least one large shared file.
- › **Strategy.** Hybrid EFSS vendors must show coherent strategies to help their customers share and collaborate on content and enhance the digital work experience. We assessed vendors on their strategies for customer success, technology, key verticals and geographic markets, and go-to-market approach.
- › **Market presence.** We evaluated each vendor based on its current customer base, the size of its EFSS revenue, and its partnerships.

The Forrester Wave™: Enterprise File Sync And Share Platforms – Hybrid Solutions, Q4 2017

The 10 Providers That Matter Most And How They Stack Up

Evaluated Vendors And Inclusion Criteria

Forrester included 10 vendors in the assessment: Accellion, Acronis, Axway (Syncplicity), BlackBerry, Citrix, Egnyte, Hitachi Vantara, IBM, Microsoft, and Thru. Each of these vendors has (see Figure 3):

- › **A dedicated road map and go-to-market strategy focused on EFSS.** Each vendor demonstrated that hybrid is a focused model for delivery of its EFSS technology and that it is investing in hybrid content repository services. The vendor also sells and markets the product as a standalone solution.
- › **Leadership in the hybrid EFSS market.** The selected vendors demonstrated the ability to shape the direction of the market, whether through innovative delivery models, technology leadership, or their dominant market presence.
- › **A proven installed base among enterprise customers.** Vendors demonstrated revenues of over \$15 million with their EFSS product offerings, and they provide offerings to meet the needs of enterprises (not consumers).

The Forrester Wave™: Enterprise File Sync And Share Platforms – Hybrid Solutions, Q4 2017

The 10 Providers That Matter Most And How They Stack Up

FIGURE 3 Evaluated Vendors: Product Information And Inclusion Criteria

Vendor	Product name
Accellion	kiteworks
Acronis	Acronis Access Advanced/Acronis Files Cloud
Axway (Syncplicity)	Axway Syncplicity
BlackBerry	BlackBerry Workspaces
Citrix	Citrix ShareFile
Egnyte	Egnyte Connect
Hitachi Vantara	Hitachi Content Platform Anywhere
IBM	IBM Connections
Microsoft	OneDrive for Business
Thru	Thru

Vendor inclusion criteria

- **A dedicated road map and go-to-market strategy focused on hybrid EFSS.** Each vendor demonstrated that hybrid is a focused model for delivery of its EFSS technology and that it is investing in hybrid content repository services. The vendor also sells and markets the product as a standalone solution.
- **Leadership in the hybrid EFSS market.** Selected vendors demonstrated the ability to shape the direction of the market, whether through innovative delivery models, technology leadership, or their dominant market presence.
- **A proven installed base among enterprise customers.** Vendors demonstrated revenues of over \$15 million with their hybrid EFSS product offerings, and they provide offerings to meet the needs of enterprises (not consumers).

The Forrester Wave™: Enterprise File Sync And Share Platforms — Hybrid Solutions, Q4 2017

The 10 Providers That Matter Most And How They Stack Up

Vendor Profiles

This evaluation of the EFSS platforms — hybrid solutions market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 4). Click the link at the beginning of this report on Forrester.com to download the tool.

FIGURE 4 Forrester Wave™: Enterprise File Sync And Share Platforms — Hybrid Solutions, Q4 2017



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The 10 Providers That Matter Most And How They Stack Up

FIGURE 4 Forrester Wave™: Enterprise File Sync And Share Platforms — Hybrid Solutions, Q4 2017 (Cont.)

	Forrester's weighting	Acellion	Acronis	Axway (Syncplicity)	BlackBerry	Citrix	Egnyte	Hitachi Vantara	IBM	Microsoft	Thru
Current offering	50%	2.94	2.27	3.41	3.09	3.68	3.96	2.55	2.58	3.78	2.64
Architecture	20%	5.00	3.70	5.00	4.60	4.60	5.00	2.40	2.40	3.20	3.90
Content and library services	20%	1.60	0.95	2.80	1.65	2.75	3.60	2.30	2.45	3.80	2.10
Collaboration and file sharing	30%	2.75	1.95	2.75	2.55	3.40	4.10	1.85	3.55	3.70	3.00
Security capabilities	15%	3.80	2.65	3.50	3.90	4.60	3.70	3.10	1.75	4.30	1.75
Usability	15%	1.50	2.40	3.30	3.25	3.30	3.00	3.90	1.85	4.15	1.85
Strategy	50%	2.50	3.00	3.20	3.30	3.70	3.00	1.90	4.30	4.50	1.90
Customer success strategy	20%	3.00	3.00	4.00	3.00	4.00	3.00	2.00	3.00	4.00	3.00
Technology strategy	55%	3.00	3.00	3.00	3.00	3.00	3.00	1.00	5.00	5.00	1.00
Vertical strategy	15%	1.00	3.00	3.00	5.00	5.00	3.00	3.00	3.00	3.00	3.00
Go-to-market strategy	10%	1.00	3.00	3.00	3.00	5.00	3.00	5.00	5.00	5.00	3.00
Market presence	0%	2.28	2.72	2.84	2.88	3.72	2.11	2.77	2.94	4.78	1.56
Customers and markets	33%	2.50	2.50	2.50	2.00	3.50	2.00	3.00	3.50	5.00	1.00
Revenue	34%	2.33	2.66	3.00	2.66	3.67	2.33	2.33	3.32	4.34	2.66
Partnerships	33%	2.00	3.00	3.00	4.00	4.00	2.00	3.00	2.00	5.00	1.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Leaders› **Microsoft offers hybrid mode with SharePoint on-premises and OneDrive in the cloud.**

Microsoft delivers workplace productivity, file-sharing, and content management capabilities that are increasingly powered by cognitive content services. Customers using SharePoint on-premises will get the best user experience for EFSS when using the cloud-based OneDrive for Business in a hybrid configuration. The security and compliance center portal enables life-cycle management, legal holds, and investigative searches via a single interface.

The Forrester Wave™: Enterprise File Sync And Share Platforms — Hybrid Solutions, Q4 2017

The 10 Providers That Matter Most And How They Stack Up

OneDrive for Business remains an area of investment for Microsoft as it works to resolve lingering usability issues — such as sync consistency and user experience across devices and platforms, particularly with clients using old sync clients. Innovations such as Microsoft Graph and related cognitive services will be in cloud or hybrid mode only. Other Microsoft 365 components, such as Flow (a workflow tool) and enhanced metadata and event-driven retention policies will enhance OneDrive's position in the file-sharing landscape.

Businesses licensed for OneDrive for Business should adopt it not because it is “free” but because it serves users' needs. Test drive its capabilities with key use cases — including ease of external sharing, large files, and integration with on-premises SharePoint.

- › **Citrix differentiates with flexible deployment choices, process, and security offerings.** Citrix provides cloud and hybrid options for its EFSS offering, Citrix ShareFile. It integrates with key content repositories, including SharePoint, network drives, and other cloud file-sharing platforms. Customers can share and collaborate on files in the context of a business process. Citrix ShareFile supports large files (up to 100 GB) by default. Customers can protect content with rights management and data loss prevention (DLP) integration, mark sensitive items with configurable watermarking tools, and execute auditable transactions with digital signature support.

Customers with data residency requirements can select from Citrix-managed storage planes in at least eight countries or use existing on-premises or cloud repository systems. The ShareFile app — the “control plane” — is available in two regions: the US and the European Union (EU). Citrix ShareFile has minimal support for cognitive services to optimize recognition, recommendations, or tagging.

Evaluate Citrix ShareFile when robust file sharing and task management are top requirements and you want flexibility in choice of on-premises, cloud, or hybrid models. Existing Citrix clients can incorporate Citrix ShareFile as part of their broader digital workplace or mobility suite.

Strong Performers

- › **Egnyte enhances governance and invests in connector strategy.** Egnyte offers Egnyte Connect as a cloud, hybrid, or on-premises EFSS solution. Options include public cloud or customers' on-premises or private cloud systems. Egnyte Protect offers policy management capabilities to control access and retention on files residing outside of Egnyte Connect. A focused integration strategy enables integration with many cloud and on-premises content and collaboration systems. Differentiators include sharing of large files and rich full-text, metadata, and federated search. Customers rated mobility and external sharing highly.

Expect ongoing innovation in areas such as analytics, content intelligence, and algorithms to detect and remediate sensitive data. Customers expressed concerns over Egnyte Connect's ability to apply disposal policies to obsolete files; however, additional life-cycle management features are anticipated in Egnyte's road map.

The Forrester Wave™: Enterprise File Sync And Share Platforms – Hybrid Solutions, Q4 2017

The 10 Providers That Matter Most And How They Stack Up

Evaluate Egnyte when secure sharing of large files, even in low-bandwidth areas, is required. Verticals such as media, manufacturing, and engineering/construction are target markets. Firms with governance needs beyond EFSS benefit from extended modules, such as Egnyte Protect.

- › **IBM Connections provides an on-premises edition but with limited integrations.** IBM offers IBM Connections, a comprehensive set of collaboration capabilities. IBM Connections can run on-premises or as SaaS in IBM's data centers. Integration with other IBM applications, such as IBM FileNet Content Manager and Content Manager 8, is available. Customers report high satisfaction with search, commenting and annotations, and team workspace setup. IBM is infusing analytics and cognitive services into IBM Connections, helping surface communication patterns, recommended content, and subject matter expertise.

Current customers report low levels of satisfaction with life-cycle management, including legal holds. IBM Connections has limited support for rights management, watermarking, DLP, and packaged migration capabilities. IBM's "Pink" modernization strategy will guide the road map for IBM Connections, moving to microservices and more integration and interoperability with third-party file services, including partner Box and Microsoft 365.

Enterprises with basic file-sharing needs can evaluate the Files basic bundle. For advanced digital workplace requirements, look at the premium edition that adds office productivity tools, algorithm-driven recommendations, and personalized contextual workspaces.

- › **Axway (Syncplicity) provides flexible hybrid options but must address search gaps.** Axway Syncplicity brings robust, secure file-sharing capabilities into Axway's data integration and engagement platform. Enterprises can choose either the US or EU privacy region. Files can reside in public or private clouds or use DataHub to integrate with content and collaboration apps. Axway Syncplicity provides granular policies to determine how files are shared, with rules to wipe or disable content on lost mobile devices. Rights management and watermarking allow customers to protect files outside the app.

The application leverages the native search of the desktop or other connected systems; customers report search as a gap. Workflow capabilities are also thin. Expect ongoing investment in Axway Syncplicity's security, data migration, and policy management capabilities, in addition to additional APIs to drive integration flexibility and support for line-of-business applications.

Axway Syncplicity is suited to regulated industries where intellectual property protection, security, data residency, and infrastructure modernization requirements are key. It benefits customers requiring a hybrid or phased approach to cloud adoption for content storage.

- › **BlackBerry Workspaces offers end-to-end secure mobility but lags in content services.** Canada-based BlackBerry has rebranded the EFSS portfolio it acquired from WatchDox as its BlackBerry Workspaces offering. It's available as a standalone app or as an integrated component

The Forrester Wave™: Enterprise File Sync And Share Platforms – Hybrid Solutions, Q4 2017

The 10 Providers That Matter Most And How They Stack Up

of BlackBerry's mobile security suite. BlackBerry Workspaces can be deployed in Amazon or Azure cloud services, on-premises as an appliance, or in a hybrid model. Hybrid deployments can use BlackBerry Workspaces' connectors to mobilize and secure content residing in existing content stores, such as SharePoint, file shares, or ECM systems.

BlackBerry Workspaces has a solid set of security capabilities but has rudimentary content repository services, such as metadata support. Workflow and analytics capabilities are also thin. Expect BlackBerry to continue to invest in its support for developers, using modernized APIs and updated developer programs to attract new partners to its growing ecosystem. Also expect continued enhancement of its core collaboration and mobile editing capabilities.

Evaluate BlackBerry Workspaces when secure, mobile-enabled file sharing is a requirement, particularly for those customers already using or considering BlackBerry's broader mobile security suite.

- › **Acellion provides a security-first approach to EFSS but lags in repository services.** Acellion provides kiteworks, a flexible, hybrid approach to EFSS. Customers can deploy kiteworks on-premises as a private cloud, host it in a public cloud, or use a hybrid model (on-premises file storage with private cloud). FedRamp cloud services are available for public sector clients. Integrations with existing content stores allow customers to keep files in home repositories, using kiteworks to distribute and collaborate on content, internally and externally. It is also rich in encryption, watermarking, and mobile protection capabilities.

Kiteworks comes up short in some key content repository capabilities, such as metadata support. Clients often use its connectors and integrations to leave files in home systems, such as SharePoint, network drives, or ECM systems. Expect Acellion to continue to invest in kiteworks' core strengths – security, monitoring, high-performance sharing of large files, and extending its workflow capabilities.

Companies that have a solid content management strategy in place but require cross-repository, secure file sharing should evaluate kiteworks. Companies shifting to cloud in phased approaches can also benefit from kiteworks hybrid, flexible deployment options.

Contenders

- › **Acronis offers a rich set of file-sharing capabilities but lags in repository services.** Acronis, well-known for its backup and disaster recovery portfolio, offers Acronis Access Advanced for on-premises deployment and Acronis Files Cloud for hosted, SaaS, or private cloud options. Partners and service providers can also offer the cloud edition to their own clients. Acronis provides connectors for common file storage and content management systems as part of its on-premises offering, allowing clients to leave files in place and making it easy to securely share content internally or externally.

The Forrester Wave™: Enterprise File Sync And Share Platforms – Hybrid Solutions, Q4 2017

The 10 Providers That Matter Most And How They Stack Up

Acronis often leverages existing file stores or ECM systems in deployments; its own repository services are rudimentary. Support for metadata, life-cycle management, and search is limited. Expect Acronis to continue to invest in its cloud offering and in extending its own collaboration and workflow capabilities. Also watch for enhancements to its APIs to drive partnerships and integrate with new cloud-based content repositories.

Companies should evaluate Acronis when they need pure-play EFSS and are required to work with content in existing content stores – whether on-premises or cloud.

- › **Thru provides high-performance file sharing but has gaps in protection features.** Thru provides its EFSS platform as a hybrid or SaaS offering, with data centers in multiple regions. Integrations with common content stores include file systems and Amazon S3, as well as SharePoint, CRM, and email systems. There are no practical limits on the file sizes supported, and the product offers strong metadata and life-cycle management, as well as robust audit trails. Customers report a high degree of satisfaction with service and support.

Thru drives a notable proportion of its business via its partner and OEM channel. It currently offers minimal support for workflow or task management or for use of analytics or cognitive services to optimize content use. Support for watermarking, DLP, and rights management is thin. Expect further investment in areas such as APIs for deeper integration with enterprise applications and support for related use cases such as managed file transfer (MFT) as a service.

Customers requiring a high-speed, large-file-handling platform should evaluate Thru, especially those in verticals like construction, shipping, tech, and telecom. Customers looking for integrations with critical line-of-business applications, including on-premises systems, should assess Thru.

- › **Hitachi Vantara offers competitive EFSS but has limited support for external content stores.** Tokyo-based Hitachi Vantara offers its Hitachi Content Platform (HCP) Anywhere as a packaged app to serve secure EFSS use cases and also embeds the underlying content storage platform. HCP Anywhere provides high-performance, highly scalable, secure file sharing across and among enterprises. Customers can deploy it in their own data centers or host it with a service provider. Strengths include support for sensitive data detection, mobility, metadata, and life-cycle management.

While customers can deploy HCP Anywhere in a range of in-house or hosted data centers, support for other key content stores, such as SharePoint or ECM systems, is limited. Support for workflow and overall collaboration capabilities are also thin. Expect Hitachi Vantara to invest in ongoing customer support and services to improve onboarding. Areas of technical innovation will include ongoing security enhancements, support for workflows, and integration with key vertical line-of-business applications.

Customers should evaluate Hitachi Vantara HCP Anywhere when secure content storage and sharing is a core requirement of a broader infrastructure or data center modernization initiative.

The Forrester Wave™: Enterprise File Sync And Share Platforms – Hybrid Solutions, Q4 2017

The 10 Providers That Matter Most And How They Stack Up

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Supplemental Material

Online Resource

The online version of Figure 4 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings. Click the link at the beginning of this report on Forrester.com to download the tool.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by August 1, 2017.

The Forrester Wave™: Enterprise File Sync And Share Platforms — Hybrid Solutions, Q4 2017

The 10 Providers That Matter Most And How They Stack Up

- › **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- › **Product demos and hands-on testing.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities. We requested that each vendor share a large file with us as part of the demonstration.
- › **Customer reference surveys.** To validate product and vendor qualifications, Forrester also conducted reference surveys with three of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria for evaluation in this market. From that initial pool of vendors, we narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation. Vendors marked as incomplete participants met our defined inclusion criteria but declined to participate or contributed only partially to the evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, please visit [The Forrester Wave™ Methodology Guide](#) on our website.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

The Forrester Wave™: Enterprise File Sync And Share Platforms – Hybrid Solutions, Q4 2017

The 10 Providers That Matter Most And How They Stack Up

Survey Methodology

The Forrester Data Global Business Technographics® Security Survey, 2017 was fielded between May and June 2017. This online survey included 3,752 respondents in Australia, Brazil, Canada, China, France, Germany, India, New Zealand, the UK, and the US from companies with two or more employees.

Forrester Data Global Business Technographics Software Survey, 2016 was fielded in August and September 2016. This online survey included 3,582 respondents in Australia, Brazil, Canada, China, France, Germany, India, New Zealand, the UK, and the US from companies with two or more employees.

Forrester Data Business Technographics ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of business and technology products and services. Research Now fielded this survey on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates.

Please note that the brand questions included in this survey should not be used to measure market share. The purpose of Forrester Data Business Technographics brand questions is to show usage of a brand by a specific target audience at one point in time.

Endnotes

¹ Source: Forrester Data Global Business Technographics Software Survey, 2016.

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