



## I D C T E C H N O L O G Y S P O T L I G H T

---

# Redefining Enterprise Mobile Collaboration

May 2014

Adapted from *ECM Strategy Survey 2013*, by Melissa Webster, IDC # 247836

Sponsored by EMC

---

*The combination of mobility and cloud services is transforming collaboration. File sync and share solutions, in particular, have seen very rapid adoption by users who want to work with their documents on their mobile devices and who need to collaborate with external stakeholders. Vendors that succeed in this market will be those that provide a compelling mobile user experience; offer organizations deployment flexibility around storage; and extend the benefits of mobile productivity to content in existing information repositories rather than create new silos of information. This Technology Spotlight examines trends and technologies that are reshaping enterprise collaboration. It also looks at the role of enterprise file sync and share vendor EMC in this strategically important market.*

## Introduction

The combination of cloud computing and mobility is profoundly changing the way we work. Nearly two thirds of information workers use smartphones or tablets for work purposes today — whether company-supplied or employee-provided (BYOD). In some cases, the mobile device is now the user's *primary* computing device. Easy-to-use apps that exploit the native capabilities of these mobile devices — such as location services and cameras — let users tap into new cloud-based productivity services that give them unprecedented access to information, truly enabling them to collaborate anywhere and at any time.

The most significant of these new cloud-based productivity services is file sync and share. The many consumer-oriented file sync and share services that have emerged over the past few years have enjoyed viral adoption within the enterprise because they address two urgent and previously unmet user needs, including:

- The ability to access and interact with files on mobile devices
- The ability to quickly and easily share files with external users, i.e. collaborators from outside the organization

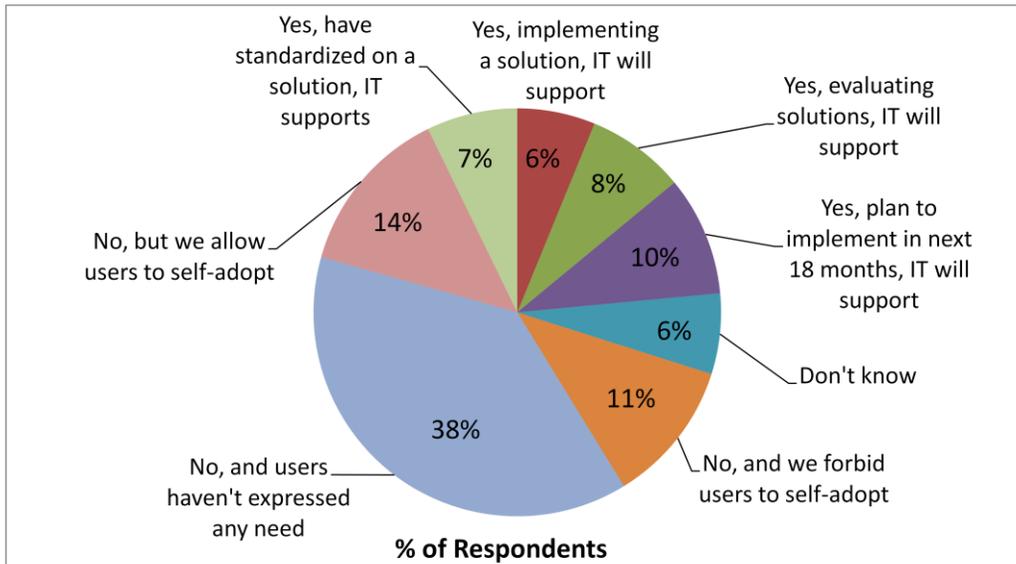
Enterprise buyers are beginning to recognize the value that file sharing solutions provide — both to end users and IT. IDC research shows that just over half of organizations believe cloud file sync and share solutions make it easy for users to access documents on their mobile devices and share them with others; and 43% say these solutions help to offload IT support, since users can manage fairly easily on their own.

Enterprises are still in the early stages of adoption however. Only 7% of organizations have standardized on an IT-supported solution, although another 24% have near-term plans (Figure 1).

**FIGURE 1**

**Enterprise Plans for File Sync and Share**

Q: Has IT deployed, or does IT plan to deploy, a SaaS file sync/share solution to users?



n=485, US/UK/France/Germany; IDC's ECM Strategy Survey, October 2013

Source: IDC, April 2014

Furthermore, many of the file sync and share solutions in use today were designed for casual file sharing by consumers and don't address the more rigorous needs of enterprise customers around security, privacy, governance, and compliance. 47% of survey respondents expressed concern that these services create fresh information governance challenges, as they create new silos of information that lack the controls the organization has put in place to safeguard its existing content repositories.

In addition, enterprises have a much broader set of file sharing and information access needs — needs that consumer file sync and share services were never designed to address. Mobile access to the user's own documents and the ability to easily share files with others are just two of the diverse and growing use cases that enterprise file sync and share services need to support.

## Benefits

Let's explore five discrete but interrelated scenarios where enterprise file sync and share solutions can provide significant value to the organization. Ideally, the enterprise can standardize on a single solution for most or all of these and save on licensing, support and training costs, as well as reduce IT complexity and administrative overhead. It's worth noting that the list of use cases amenable to file sync and share solutions will continue to grow because the market is still young and characterized by rapid innovation.

## ***Information Security and Governance***

Information leaks continue to be a significant issue in many organizations. IDC survey research has shown that up to a quarter of organizations suffer some kind of information leakage each year. As noted previously, consumer-grade file sync and share solutions often lack the features required to manage and safeguard enterprise information. Organizations whose employees are using their personal accounts to exchange business documents with the company's partners, suppliers and customers are at risk. Enterprise-grade file sync and share solutions provide the multilevel security and policy management required to ensure control over sensitive or proprietary information.

## ***Enterprise Content Delivery***

Organizations need a file sync and share solution that provides both user-initiated (pull) and policy-driven (push) file sharing. There are many situations where push is required including companies needing to reliably distribute new price lists to the sales force; compliance-related policies and procedures to the employee base; executive communiqués to the management team; and packets to the board of directors. Sync and share solutions that offer secure push capabilities can replace legacy enterprise content delivery solutions, saving cost and complexity and ensuring that users have the right content at the right time.

## ***FTP Server Replacement***

Many organizations realize that their legacy FTP servers create business risk. Often, these servers are in remote locations without IT oversight so they can be undependable and relatively insecure. Enterprise file sync and share solutions are replacing FTP servers in many organizations because they make information workers far more productive and offer policy-driven security and access controls.

## ***Real-Time Desktop Backup***

Historically, desktop backup solutions have come from a focused group of specialist vendors. This is changing, however. IDC has spoken with several companies that use a file sync and share solution designed for collaboration in lieu of a desktop backup system. With file sync and share solutions, these companies enjoy real time protection for their business documents — including documents that users revise on their mobile devices.

## ***Mobile Content Editing***

As IDC research shows, mobile editing has been an important user requirement for some time and is emerging as a new use case for enterprise file sync and share solutions. A file sync and share solution that lets users create and edit content directly in the mobile app is by far the best approach. Users don't want to change context — or user interface — to view and modify documents. They want to be able to quickly make any required changes and share a new edition with their collaborators. IDC expects to see greater emphasis on integrated content creation capabilities from file sync and share vendors in 2014.

In addition to supporting the broader set of enterprise file sync and share needs, enterprise solutions must offer APIs to facilitate integration with existing applications, repositories, collaborative solutions, and mobile device management solutions. We can expect to see growing interest in the future around connecting these solutions to enterprise business processes.

## Key Trends

We already see evidence of the convergence of these use cases into a single solution, and that convergence is intensifying competition in the file sync and share marketplace. Let's review the key convergence trends.

- Enterprise content management vendors are introducing hybrid ECM solutions that combine cloud-based collaboration with on-premise content management. Hybrid ECM enables secure sharing of on-premise enterprise content with full governance and control over the content lifecycle. In the future, hybrid ECM will support ad hoc decisioning workflows that combine ad hoc, user-driven task management with more structured case management.
- Vendors from the collaborative applications market are extending their solutions beyond the firewall via link sharing, and via desktop and mobile apps that provide offline file management.
- Desktop backup vendors are entering the file sync and share market seeking to extend the value of their solutions by enabling users to access their files using their mobile devices, and share their files with others through links.
- Managed file transfer vendors are extending their solutions with persistent file storage in the cloud and via mobile and desktop apps that make cloud file shares accessible to users from their device of choice.
- Mobile device management vendors are broadening their capabilities beyond device security to include mobile content management.
- Startups that offer mobile content creation tools also provide file sync and share capabilities. Examples include mobile word processors, spreadsheets, presentation tools, note taking apps, annotation and markup tools.
- Last but not least, the pureplay file sync and share vendors that have sprung up to address user needs for mobile access to content and easy external sharing have begun to add enterprise administration and security features to appeal to IT, and APIs to attract ISVs and enterprise application developers.

## Key Vendor Success Criteria

Customers are already benefitting from market convergence as vendors make significant investments in new functionality to compete. The powerful combination of mobility and cloud services is transforming enterprise collaboration, and we expect the enterprise file sync and share market to evolve quickly.

The mobile experience, however, must be very compelling. It's not enough to port a desktop experience to mobile devices. Users want a highly customized, native app experience on their mobile phone or tablet, one that both optimizes the experience given screen "real estate" limitations and that takes maximum advantage of touch and gestural user interface elements. As we have seen with consumer mobile services, the quality of the user experience is a critical factor in user productivity, engagement and adoption.

In addition, solutions must give the organization deployment flexibility when it comes to storage — spanning both on-premise and cloud options. Vendors that provide a location-agnostic solution will be able to meet broader enterprise needs around data residency. Of course, this must be completely transparent to the user.

Finally, enterprises cannot afford to migrate their content — or create new silos of information — in order to leverage the productivity advantages of cloud file sync and share. They need the ability to extend the benefits of mobile productivity to the content in their *existing* information repositories without requiring migration. Vendors must provide connectors to enterprise data sources; APIs that enable organizations to integrate file sync and share with their enterprise business processes will become increasingly important over time.

In the long run, the vendors that emerge as leaders will be those that successfully re-imagine the content collaboration experience — in a way that takes maximum advantage of the unique capabilities of mobile devices including location services and cameras — and provide solutions that significantly improve user productivity.

## Considering EMC Syncplicity

EMC, a leading provider of storage, security, cloud, and big data solutions with \$23.2 billion in 2013 revenue, acquired privately held Syncplicity, Inc. in May 2012. Based in Santa Clara, California, Syncplicity provides an innovative cloud-based file sync and share solution that enables enterprise customers to manage, mobilize and backup their files. It provides highly secure file sync and share combined with rich and intuitive mobile and Web user interfaces.

Syncplicity enables users to interact and share content on their device of choice thereby enhancing mobile collaboration. End users today expect mobile applications to offer a first-rate user experience. Because this is so critical to successful user adoption, EMC has invested heavily in usability. In the latest release of Syncplicity apps for iPad and Android, the user experience has been enhanced with redesigned icons, a new navigational paradigm and contextual menus and visual cues:

- Apps prominently display the user's most active files and folders, and bubble up notifications that keep users productive.
- Syncplicity Insights™ uses predictive analytics to streamline repetitive tasks. For example, by analyzing the user's calendar, Syncplicity can automatically create a distribution list for the user who needs to send files to meeting attendees.
- A personalized home screen affords quick access to relevant information; and sheet-based navigation makes it easy to find content in deep folder hierarchies.

Users increasingly expect a seamless content editing experience when using file sync and share solutions, but they don't always get it. EMC has paid special attention to the content creation experience:

- Syncplicity apps can directly open and edit Microsoft Office documents including Word, Excel, and PowerPoint.
- In addition, users can deliver PowerPoint presentations, complete with transitions and animations, directly from their mobile devices

Syncplicity is designed to meet the increasingly stringent requirements for security and governance in the enterprise. It provides advanced group-level policy-based control over external sharing. Organizations can use geo-fencing to restrict access to specific device locations, or limit access to approved domains or IP addresses to control access to information from mobile devices, kiosks and Web browsers. Capabilities include:

- Single sign-on (SSO) with Active Directory and SAML-based authentication systems. Active Directory synchronization automates user provisioning and deprovisioning.

- Two-factor authentication and AES 256-bit encryption for information in transit and at rest
- Remote wipe of devices, user accounts, and folders; mobile passcodes with automatic account wipe; and mobile device management integration with Good Dynamics
- Syncplicity's Storage Vault Authentication is an innovative solution that allows customers to control logical access to Syncplicity content that is stored on-premise using the "two-man rule". In contrast to traditional customer-managed keys, this is a lightweight approach that is frictionless for users and imposes no key management overhead on IT.

Syncplicity decouples workflow from storage; this means enterprises can configure Syncplicity for any permutation of cloud and on-premise storage using policies:

- Syncplicity is storage location-agnostic. Syncplicity StorageVaults give IT policy-driven control over where data is stored. StorageVaults™ provide hybrid off-premise and on-premise storage (hybrid cloud) based on user, group and folder policies to meet security and data residency requirements.
- Syncplicity seamlessly integrates with EMC Isilon scale-out NAS, EMC Atmos object storage, EMC VNX/VNXe file/block storage and ViPR, so organizations can elect to keep their content on premise if they wish while users connect to the cloud. Content can be stored in a public or private cloud and access controls can be defined by user, group, folder file or content type.
- Group-Level Policies enable “policy sets” to be applied for external sharing, system access, authentication and shared link security using a “rank order” approach allowing IT administrators to assign and adjust permissions for a larger group of end users.

Syncplicity mobilizes content in the enterprise's *existing* content stores — without migrating or duplicating information:

- Syncplicity provides unified mobile access to home directories, file shares, SharePoint, Documentum, and other content repositories. This spares organizations the need to create new silos of information in order to enjoy the benefits of file mobile access.

## **Challenges**

EMC faces a few challenges in this very competitive and fast moving market space. We have already seen very rapid user self-adoption of consumer file sync and share services. EMC Syncplicity must compete with a growing list of file sync and share providers, most of which are beginning to target enterprise buyers.

EMC's primary challenge is gaining mindshare for Syncplicity in a chaotic market characterized by tremendous hype right now. EMC must also help customers better understand its key differentiators, which will entail some education among both LOB users and IT. As noted previously, EMC has focused significant attention on providing a very high quality user experience — one that translates into greater user productivity. EMC needs to appeal directly to LOB users here. Separately, it needs to help IT organizations understand how Syncplicity's storage-independent architecture and flexible deployment model can help address the organization's broader needs.

## Conclusion

IDC believes the file sync and share market will continue to grow at a very rapid pace over the next 5 years. To the extent that EMC Syncplicity can address the challenges described in this paper, it has excellent prospects. This is both a greenfield opportunity and one that is disruptive to several legacy markets.

Information workers today require mobile solutions that enable them to work anywhere, on any device, and quickly and easily access business-critical information on the go. They need their mobile apps to provide a compelling user experience — an experience that makes them maximally productive with the fewest clicks. They should adopt a "mobile first" strategy and choose a vendor that is innovating in mobile user experience — both in terms of visual interface design and built-in intelligence. Vendors that build predictive analytics into their solutions will be able to save users valuable time and relieve them of repetitive tasks that sap productivity.

At the same time, companies can't afford to create new silos. They must be able to mobilize existing content in their file shares, home directories, team sites and content management repositories without needing to migrate or duplicate the information. They must be able to access, manage and revise content in place, wherever it lives, so it continues to be governed and protected by the organization's existing policies and business rules.

Many organizations are concerned about putting sensitive, business-critical documents in the cloud; they need a flexible deployment model that lets them determine what goes into the cloud and what stays on-premise. They need a solution that is storage location-agnostic to address data residency requirements.

Finally, they must be able to do all of this with excellent security and governance, in an automated, policy-driven way that is easy to administer. Enterprises need a solution that addresses the full continuum of needs from casual sharing via public links to highly secure sharing of rights-managed content. They should look for a vendor that offers choice and enterprise-class authentication.

Customers should ask themselves the following questions:

- Can our employees easily access all of their business-critical information from their mobile devices? Do their native apps that let them work with their content offline? Are these apps easy to use and intuitive so employees are maximally productive?
- Can our employees easily and securely share content with others inside and outside the organization — including large files — with excellent performance? Can administrators establish policies to ensure that sensitive information and intellectual property is properly protected?
- Do our users have seamless access to their home directories, file shares and content repositories?
- Does our file sync and share solution give us control over where information is stored, whether in the cloud or behind our firewall? Does it give us flexible deployment options?
- Do users have real-time document backup with continuous availability from any device? Do they need data protection for mobile content, i.e. content users edit on their mobile devices?

As our research shows, in the age of the "consumerization of IT" users are apt to repurpose the apps they use at home for business use if the IT department doesn't offer them an alternative. This often puts the IT department on the defensive, and that can quickly lead to tactical decisions.

Groups in IT that are responsible for productivity tools should proactively engage with users to understand their needs. Then, they should step back and consider the organization's broader file sync and share needs and choose a solution that is strategic, i.e. one that can meet both their current and future needs.

IT faces significant downside risks by doing nothing. Consumer solutions lack adequate security and protection mechanisms for the management of enterprise information and will create new silos of information that aren't managed or governed in accordance with the organization's policies. A purely reactive approach will most certainly result in a hodgepodge of different and overlapping services.

---

#### A B O U T T H I S P U B L I C A T I O N

This publication was produced by IDC Custom Solutions. The opinion, analysis, and research results presented herein are drawn from more detailed research and analysis independently conducted and published by IDC, unless specific vendor sponsorship is noted. IDC Custom Solutions makes IDC content available in a wide range of formats for distribution by various companies. A license to distribute IDC content does not imply endorsement of or opinion about the licensee.

#### C O P Y R I G H T A N D R E S T R I C T I O N S

Any IDC information or reference to IDC that is to be used in advertising, press releases, or promotional materials requires prior written approval from IDC. For permission requests contact the Custom Solutions information line at 508-988-7610 or [gms@idc.com](mailto:gms@idc.com). Translation and/or localization of this document require an additional license from IDC.

For more information on IDC visit [www.idc.com](http://www.idc.com). For more information on IDC Custom Solutions visit [http://www.idc.com/prodserv/custom\\_solutions/index.jsp](http://www.idc.com/prodserv/custom_solutions/index.jsp).

Global Headquarters: 5 Speen Street Framingham, MA 01701 USA P.508.872.8200 F.508.935.4015 [www.idc.com](http://www.idc.com)