The Aragon Research Globe™ for Mobile Content Management, 2015
– The Race to Win the Enterprise

Summary: Managing Mobile Content is becoming more strategic and more competitive as enterprises focus on long-term implications and outcomes. Aragon Research introduces its second Globe for Mobile Content Management and evaluates 19 major MCM providers.

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Mobile Content Management: The Time is now

The Mobile Content Management market is undergoing a significant shift as we enter the height of MCM – larger vendors are getting larger and smaller ones are pivoting to differentiate their offering or their market focus. This is a natural evolution of how the content management market has been evolving for the last twenty years. Mobile is the most recent iteration of this market and it shows no sign of slowing down, due to the sheer demand for all types of content.

While more content is being accessed and shared on mobile devices than ever before, the need for apps to access and share - and even process - content is one of the new emerging needs as Mobile Apps help to power Digital Transformation. The focus on pure file sharing is becoming a commodity. Moreover, the financial clout of large players, who are offering aggressive pricing, is one of the main reasons for the market shift.

A growing trend is the shift toward content being shared by mobile apps. The need for mobile apps to be transformative means that Mobile Content Management platforms need to be capable of leveraging their content via APIs.

Mobile security is a top priority in gaining managed control over smartphones and tablets in business, whether the devices are company-owned or BYOD. Content stored on these devices is a critical exposure, and protecting the intellectual property of the business demands a mobile content management strategy. Given all of the issues that surround the enterprise regarding Cyber Attacks, MCM Providers have stepped up their efforts around content security and have made it a priority. The challenge for many enterprises, however, is to actually deploy these security features.

Mobile Content Management Defined

Mobile Content Management is more than just managing content; it’s focused on securing content, while also enabling collaboration around it. The key attributes we see in Mobile Content Management include:

- Ability to store files in the cloud or in hybrid cloud models
- Ability for quick and easy access to content from mobile devices, such as tablets and smartphones and other emerging mobile devices
- Mobile apps that make it easy to access and manage content
- Ability to collaborate with others on or around the content
- Ability to edit content
- Ability to protect content outside of the repository
- Ability to manage content via policies
- Ability to integrate with other Content Repositories

For 2015, there are a number of key developments that are shaping the MCM Market. Many of these key characteristics are not new but signal how the market is reacting to the changing needs of enterprises (see Figure 1).
MCM Goes Vertical – The Return of CEVAs

The focus on MCM is now squarely focused on the Enterprise. The challenge for both buyers and providers is matching the capabilities with the needs of the business. This means that Content Enabled Vertical Applications are back – they really never left. More MCM vendors are shifting their focus – in part because that is what business users want. There are a number of providers who are now targeting solutions in certain verticals (e.g. SpringCM – Sales).

For 2016, enterprises should expect to see more focus on CEVAs. This is because if a solution solves a particular document process, the business often wants to buy and deploy it faster than a pure horizontal offering. Enterprises should also realize that it is very common to have several core repositories – in part due to how different parts of an enterprise are managed.

File sharing and syncing systems are designed to simplify those activities for individual users. In 2015, core file sync and share features have become a commodity. The aim of these systems is to provide ready access to all of a user’s content regardless of file type and independent of device. Mobile access is a key feature, as users typically need to access information on their work PC from a home computer, a laptop, and on one or more mobile devices, including smartphones and tablets. However, sharing and syncing is a feature of MCM; it is not its definition.

Content Federation is the New Normal in MCM

The idea of accessing content in different locations is what Content Federation is all about. Leading MCM providers are making it easier to enable Content Federation with content stored in other platforms. Office 365, Google Drive, and Box are some of the leading integrations. IBM has also made it easier to integrate Box with IBM’s ECM Platform – and we expect to see more ECM Vendors offering better interoperability with MCM providers going forward.
The hardline distinction between MCM and Enterprise Content Management is also beginning to waver. Larger players are adding more ECM features and ECM Players are moving into MCM. Examples include Box and Google, which added a number of ECM-like features (e.g. record retention, legal hold and eDiscovery). Others, such as ABC and OpenText, have added MCM that integrates and extends their ECM platform.

Mobile App Integration

One of the recent trends is to expose content to more applications. Making documents and paperwork an afterthought is not what Digital Transformation is all about. A number of MCM providers, such as Accellion and Box, have opened up their architecture to allow for apps that allow the document repository to be accessed from within a Mobile App.

As the number of business Mobile Apps continues to grow, the need to access and manage content within those apps becomes more critical. This means that while some providers will focus on just the management of content, others will open up their platform to allow documents and content to be leveraged inside of other apps.

As platforms continue to become the new way to innovate in certain business areas, the need for leading MCM providers to open up their architecture will grow. Asking providers for roadmaps for how they will allow for mobile integration is a best practice.

Collaboration

At the heart of MCM is content in context. This context is crucial for collaborative interactions between colleagues and external parties. One of the major lessons ECM teaches is that people collaborate around content. Given the trend of cloud integration, we expect many to partner with others or to use a PaaS to integrate with other collaboration offerings, such as ESN and Mobile Collaboration.

There are still looming issues surrounding mobile email. Many enterprises are shifting to a more secure email client due to issues with both access and, most importantly, security.

Document Editing and Annotation

As Document Editing capabilities mature, it makes MCM providers much more of a threat to content editor kings such as Microsoft and Google. Editing documents, such as presentation slides, has gotten easier. For teams on the go, including Sales Professionals, it provides a faster way to update and or collaborate on a document that is mission critical (e.g. a Sales Contract). While many may opt for a native editor, users have a much larger set of choices for Mobile Editing and Annotation (e.g. Apple, Box, Google, IBM and Microsoft). On top of that, for certain classes of workers, they don’t require the higher-end editors, making a bundled MCM editor a good value. Enterprises need to evaluate how many of their users need a full editing suite and which ones require more basic editing/annotation capabilities.

Security Goes Front and Center

Content Security remains a challenge. In 2015, more providers have better security than even compared to last year. Document Centric Security is also becoming much more common in the
enterprise editions of a number of offerings. Most of these features can be turned on or off. Key areas to focus on include:

- Remote and/or offline viewing
- Recall
- Watermarking
- Content wiping (selective or full)
- Content retention policies
- Audit trails of content sharing and access

**Security: Turn on Rights Management and Encryption**

If there is anything that has changed, it is that the market has moved beyond just encryption. In 2015, rights management is becoming a standard feature set. More than half of the vendors in this report now offer both rights management and encryption. Enterprises need to look carefully at these options and should take steps for certain classes of documents and associates – to turn on both IR and Encryption.
Aragon Research Globe Overview

The Aragon Research Globe graphically represents our analysis of a specific market and its component vendors. We use a rigorous analysis of each vendor using three dimensions that enable comparative evaluation of the participants in a given market.

The Aragon Research Globe looks beyond size and market share, which often dominate this type of analysis, and instead uses those as comparative factors in evaluating providers’ product-oriented capabilities. Positioning in the Aragon Research Globe will reflect how complete a provider’s future strategy is, relative to their performance in fulfilling that strategy in the market.

A further differentiating factor is the global market reach of each vendor. This allows all vendors with similar strategy and performance to be compared regardless of their size and market share. It will improve recognition of providers with a comprehensive strategy and strong performance but limited or targeted global penetration, which will be compared more directly to others with similar perspectives.

Dimensions of Analysis

The following parameters are tracked in this analysis:

**Strategy** reflects the degree to which a vendor has the market understanding and strategic intent that are at the forefront of market direction. That includes providing the capabilities that customers want in the current offering and recognizing where the market is headed. The strategy evaluation includes:
- Product
- Product strategy
- Market understanding and how well product roadmaps reflect that understanding
- Marketing
- Management team, including time in the job and understanding of the market

**Performance** represents a vendor’s effectiveness in executing its defined strategy. This includes selling and supporting the defined product offering or service. The performance evaluation includes:
- **Awareness**: Market awareness of the firm and its product
- **Customer experience**: Feedback on the product, installs, upgrades and overall satisfaction
- **Viability**: Financial viability of the provider as measured by financial statements
- **Pricing and Packaging**: Is the offering priced and packaged competitively?
- **Product**: The mix of features tied to the frequency and quality of releases and updates
- **R&D**: Investment in research and development as evidenced by overall architecture

**Reach** is a measure of the global capability that a vendor can deliver. Reach can have one of three values: *national, international* or *global*. Being able to offer products and services in one of the following three regions is the third dimension of the Globe analysis:
• **Americas** (North America and Latin America)
• **EMEA** (Europe, Middle East and Africa)
• **APAC** (Asia Pacific: including but not limited to Australia, China, India, Japan, Korea, Russia, Singapore, etc.)

The market reach evaluation includes:

- Sales and support offices worldwide
- Time zone and location of support centers
- Support for languages
- References in respective hemispheres
- Data center locations

**The Four Corners of the Globe**

The Aragon Research Globe is segmented into four sectors, representing high and low on both the strategy and performance dimensions. When the analysis is complete, each vendor will be in one of four groups: **leaders**, **contenders**, **innovators** or **specialists**. We define these as follows:

- **Leaders** have comprehensive strategies that align with industry direction and market demand, and perform effectively against those strategies.
- **Contenders** have strong performance, but with more limited or less complete strategies. Their performance positions them well to challenge for leadership by expanding their strategic focus.
- **Innovators** have strong strategic understanding and objectives, but have yet to perform effectively across all elements of their strategy.
- **Specialists** fulfill their strategy well, but have a narrower or more targeted emphasis with regard to overall industry and user expectations. Specialists may excel in a certain market or vertical application.

**Inclusion Criteria**

The inclusion criteria for this Aragon Research Globe are:

- **Revenue**: A minimum of $4 million in primary revenue for mobile content management software, or $8 million in a related market (EMM, ECM, portal or collaboration).
- **Shipping product**: Product must be announced and available.
- **Customer references**: Vendor must produce a minimum of three customer references in each region that the vendor participates in.

**Inclusions**

For 2015, there are two new entrants in the MCM Globe. These include:

- Egnyte
- Intralinks
Exclusions

The following vendors were excluded from this year’s evaluation:

- **MobileIron**: MobileIron, a leading EMM provider, has not been focused on Mobile Content Management as a core strength.
- **Code42**: Code42, a leader in PC and Mac backup and recovery, has exited from the MCM Market so it can focus on its core CrashPlan business.
Figure 2: The Aragon Research Globe™ for Mobile Content Management, 2015
Leaders

Accellion

Accellion has continued its push to make its flagship offering kiteworks one of the most secure on the market, and has continued its innovation march with more capabilities to leverage kiteworks with Mobile Apps. Accellion has helped to make document security a must-have feature set of capabilities that others have emulated. With multiple cloud deployment options (SaaS, Private (on-premise) and hybrid), Accellion is well positioned to tackle the sensitive and compliance challenges that face the enterprise.

Mobile and IoT are the next challenges that enterprises face. Accellion is one of the few providers who has a full SDK to allow for kiteworks to be integrated into next-generation mobile apps. Additionally, it has also been driving sales and has won many high-profile accounts. This is due in part to its early focus on MCM and its flexible deployment options. Accellion also supports Content Federation, and provides content connectors to Box, Dropbox, EMC Documentum, Google Drive, Microsoft SharePoint and One Drive, Windows File Share, and OpenText.

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<th>Strengths</th>
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<td>Mobile App Support</td>
<td>Partner ecosystem</td>
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<td>Deployment options</td>
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<td>Rights management</td>
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<td>Content and access security</td>
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AirWatch

AirWatch, which is wholly owned by VMware, offers a complete MCM offering called AirWatch Content Locker, which continues to receive praise from AirWatch users, in part due to their focus on solutions. AirWatch and VMware have also gone further into Collaboration by bundling AirWatch Content Locker and AirWatch Video with Socialcast to offer the VMware Collaboration Suite. Vertical solutions in industries such as aerospace, pharmaceutical and sports remain some of the key reasons for the interest and enthusiasm in Content Locker.

AirWatch shows no signs of slowing down on its focus and execution with Content Locker. Because of its tight integration with its flagship EMM Platform, AirWatch offers the content control and security that is quickly becoming a must-have for many enterprises. Due to the need to have flexibility on storage locations, Content Locker was one of the earliest providers to allow enterprises to store content in the AirWatch Cloud or in other repositories, such as Microsoft SharePoint or Box.

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<th>Strengths</th>
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<td>Collaboration product bundle</td>
<td>Awareness outside the EMM market</td>
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<td>Vertical solutions</td>
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<td>Document security</td>
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<td>Pricing</td>
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Box

Box, which is now a publicly traded company, has become one of the go-to options for Content Management in the enterprise. As such, they represent a threat to Microsoft SharePoint. Box has transformed its offering by adding significant enhancements to their feature set and platform.

Box has made major enhancements to security and rights management. It has also added retention capabilities and a legal record hold which is coming soon; these are indicative of Box being an enterprise provider. But most importantly, perhaps, are the changes that have been made to the Box platform. The Box SDK and APIs allow enterprises to build mobile apps that leverage content stored in Box. Few other providers offer this today, and when evaluating a Mobile Strategy, the ease of integrating Box into Mobile Apps is another reason for their continued success.

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<th>Strengths</th>
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<td>Brand recognition</td>
<td>Profitability</td>
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<td>Global presence</td>
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<td>Security</td>
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<td>Mobile SDK and APIs</td>
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Dropbox

Dropbox, based in San Francisco, has morphed from a consumer-focused offering to one that has become a standard MCM option for Marketing Departments and others, where the need to share large files quickly and easily is critical. The popularity of Dropbox for Business is due in part to its ease of use.

Dropbox has been making a strong push for the enterprise via its Dropbox for Business offering, and it has the financial wherewithal to do so. A strong focus on the needs of the enterprise has helped to build the business case for Dropbox. This includes the ability to collaboratively work on content in Dropbox.

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<th>Strengths</th>
<th>Challenges</th>
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<td>Brand awareness</td>
<td>Still perceived as a consumer offering</td>
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<td>Ease of use</td>
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<td>Marketing Use Case</td>
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<td>Support for multiple file types</td>
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Google has been quietly transforming its focus to be on the Enterprise with Google Apps for Work. With its focus on Google Drive, which is one of the fastest ways to manage content from mobile devices, Google has helped to pioneer the shift to content in the cloud. Google Drive has supported video for years and in 2015, Google has added a number of enterprise class features, including its Vault Data Management and eDiscovery Service.

Because Google Drive is bundled with Google Apps for Work, it is one of the few technology providers that can challenge Microsoft in the battle for Cloud Office Suites. Google Drive is offered in both consumer and business account offerings. Additionally, Google’s simply priced, cost efficient model is one of the reasons that organizations consider Google and ultimately decide to go with them. Finally, Google continues to advance industry standards for security with features like security key and Smart Lock. Google recently added ISO/IEC 27018:2014 privacy standard to their compliance framework and has been FISMA certified for years, giving it a leg up when it comes to cloud security in government entities.

**Strengths**
- Google for Work awareness
- Pricing
- Ease of use
- Integrated product bundle
- Speed of Mobile Apps

**Challenges**
- Still viewed as consumer-focused
Huddle

With a new infusion of capital and a new CEO, Huddle is well positioned to serve as a work tool that leans heavily on its Content Management base, but does so with an ease-of-use in collaborating around content. Like others, as the market continues to mature, the focus for Huddle will be on critical use cases. Today, Huddle is about being productive at work as well as at external activities. Huddle has been a pioneer in enabling work productivity but has also set the standard around Predictive Content, since it can recognize usage patterns and have the content that the user will most likely need synced and available on the tablet. The future of work is all about Predictive content, and we expect others to follow Huddle’s lead here.

Huddle continues to execute in Europe and North America with a growing focus on government, consulting and accounting verticals. It’s ideal for professionals on the go who need to share and collaborate around content that is being accessed from mobile devices.

**Strengths**
- Ability to collaborate with people and content
- Predictive Content
- Mobile experience
- Ease of collaboration

**Challenges**
- Awareness in the U.S.
IBM is leveraging its Mobile Content Management capabilities as part of MobileFirst Protect (formally MaaS360), as well as its ECM capabilities and new partnerships. In July 2015, IBM and Box announced a strategic partnership that will leverage the strengths of both platforms. This now gives IBM several go-to-market options that will allow it to participate in the growing MCM Market. MobileFirst Protect’s EMM product line includes Document Sharing, which now can access and manage content stored in Box.

This gives IBM two go-to-market routes – bundling MCM with its flagship MobileFirst Protect EMM Suite and leveraging IBM ECM capabilities when large enterprises want to leverage MCM. As with other EMM providers, MobileFirst Protect offers strong document-level security, due to its secure container and policy management features. Besides Box, MobileFirst Protect can also integrate with other repositories, such as Google Drive and Microsoft.

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<th>Strengths</th>
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<tr>
<td>Fine-grained content control</td>
<td>Overlap with IBM ECM offerings</td>
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<td>Integration with EMM</td>
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<td>Support for on-premises and cloud</td>
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<td>Box Partnership</td>
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Contenders

Good Technology

Good is now owned by Blackberry, which also acquired WatchDox in April 2015. The combined entity of Good and Blackberry will have strong appeal in a world that features cyber attacks and cyber espionage as a daily occurrence. Good offers one of the most secure mobile email offerings that runs on multiple mobile platforms. At the same time, Good Share, as well as the Docs capability within the Good Work app, provides the ability to manage and protect content inside of apps, as well as content stored in other repositories, such as Microsoft SharePoint, Accellion Box, and others. This makes Good a strong choice where content security across apps, devices and storage locations is critical.

Good now offers Mobile Content Management capabilities with its Good Collaboration Suite and Good Mobility Suite. Good’s Secure Mobile Email is one of the standards in many enterprises.

**Strengths**
- Secure mobile email
- Content federation with Accellion, Box and other third-party ISV storage solutions
- Content security, app-level encryption and data protection inside and between mobile apps
- Secure Microsoft Office document editing capabilities from mobile devices

**Challenges**
- Does not provide own hosted storage solution
Microsoft

Microsoft offers OneDrive and SharePoint Online as part of its flagship Office 365 Cloud Office Suite. OneDrive has suffered from user dissatisfaction in part due to the fact that OneDrive had more features than OneDrive for Business.

OneDrive is essentially SharePoint Online and today, the SharePoint Server is one of the largest content ecosystems. Microsoft can leverage its momentum behind Office 365 and the marketing of the suite, along with its generous 1 Terabyte of storage. On top of that, the return of Jeff Teper to manage the SharePoint and OneDrive team means that some of the missteps in OneDrive are quickly being rectified. While SharePoint Online and OneDrive for Business are bundled with Office 365, enterprises are still opting for other MCM choices while simultaneously maintaining their on-premises SharePoint server farms.

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<th>Strengths</th>
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<td>• Brand recognition</td>
<td>• OneDrive mobile app functionality</td>
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<td>• Office 365 Momentum</td>
<td>• Adoption of OneDrive in the Enterprise</td>
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<td>• SharePoint Install Base</td>
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<td>• FISMA certification for Office 365</td>
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<td>• Storage options up to 1 terabyte per user</td>
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OpenText

OpenText’s Tempo Box is now offered as an extension of its ECM capabilities. Tempo Box user licenses are offered free to customers that own Content Suite Platform and/or Extended ECM for SAP 10.5 or higher.

Tempo Box allows ECM users the ability to both securely share and synchronize enterprise content (content that resides in Content Server) and personal content across desktops and mobile devices. Content can be simply shared with both internal and external users of the system. Tempo Box sits on top of their Content Server instance - meaning that it is available on-premises, private cloud or hybrid cloud, and can inherit both the security and records management policies that reside on the existing folder structures.

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<th>Strengths</th>
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<tr>
<td>• ECM platform</td>
<td>• Awareness of Tempo Box outside the OpenText customer base</td>
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<td>• OpenText brand</td>
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<td>• Audit controls</td>
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<td>• Integration and Support for SAP Environments</td>
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Innovators

Acronis

Acronis, based in Burlington, MA, has been ramping up its focus on Mobile Content Management. Acronis Access Advanced is an on-premise and private cloud solution that is compatible with leading EMM providers such as Citrix, Good, and MobileIron. It’s one of the first solutions to offer Microsoft Intune integration.

Given their strong Security and Policy management capabilities, Acronis is a solid choice in regulated industries, such as financial services, pharma, healthcare, education and government. Part of the reason for its success in these industries is because of its ease of use, broad mobile platform support, strong security, and privacy functions, as well as policy management, making it ideal for sensitive content. In 2015, Acronis has been doing more to integrate with Office 365, and now supports EMC Documentum, Alfresco and generic CMIS solutions, including support for editing capabilities as well as integrating with Microsoft InTune.

**Strengths**

- Strong content repository support
- Broad client platform support
- Ease of use and consistent user experience across data repositories
- Integration with Microsoft Intune, Citrix, Good and MobileIron
- Advanced and granular Policy management

**Challenges**

- Awareness of its MCM offering
Alfresco

Alfresco has witnessed growth and innovation over this past year, and is gaining traction for its Alfresco in the Cloud offering that is supported by its flagship ECM offering Alfresco One. The attractiveness of Alfresco is that their offering allows an enterprise to deal with legacy mission critical content, while simultaneously serving the needs of a growing mobile workforce.

Alfresco is focused on enabling a new generation of content-centric business apps, which will include mobile enablement. Alfresco has also been gaining momentum in migrating legacy ECM installed-base offerings to its modern ECM platform. The Alfresco Mobile platform is built on a modern native SDK that enables customers and partners to mobilize data and processes in Alfresco One. Alfresco offers iOS and Android apps that work out of the box, but can also be configured to suit a company’s mobile needs. Uniquely, the iOS and Android apps are available as open source, providing a great starting point for customers and partners looking to specialize their mobile solution for specific users or industries.

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<td>• Mobile Support</td>
<td>• Focus is on ECM replacements</td>
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<td>• ECM capabilities</td>
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<td>• Pricing</td>
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<td>• On-premises or cloud offerings</td>
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Citrix

Citrix offers its ShareFile MCM offering as part of XenMobile (EMM), Workspace Suite, Workspace Cloud, and Citrix collaboration offerings. ShareFile enables users to access and share files across devices for collaboration with internal and external parties. With ShareFile, users can store data in the most optimal locations, which Citrix refers to Storage Zones. Citrix also provides flexibility when it comes to storage, and offers cloud (via Amazon or Microsoft Azure), on-premises or hybrid cloud.

ShareFile has been updated in 2015 to include Microsoft Office 365 integration. Citrix has a strong track record in highly regulated industries, and is HIPAA and FINRA Compliant. ShareFile has some feature limitations based on where content is stored, though Citrix indicates that this would be addressed in 2016. ShareFile users can also use or build connectors to other on premise ECM systems and also LOB systems. ShareFile leverages strategic security capabilities from XenMobile, and given the different ways that ShareFile is sold, awareness is on the rise.

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<td>• Ease of use</td>
<td>• Awareness outside of Citrix accounts</td>
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<td>• Offered standalone or as a product bundle</td>
<td>• Some feature limitations based on where content is stored</td>
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<td>• Strong security capabilities; HIPAA and FINRA compliance</td>
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Egnyte

Egnyte, based in Mountain View, CA, has been focused on a Mobile First approach to Mobile Content Management that includes support for wearables, such as the Apple Watch. One of the areas that Egnyte excels at is its ability to allow users to access content both online and offline – something that is critical in certain use cases, such as Sales.

Egnyte makes it easier for IT departments to know what is going on with content via its easy-to-deploy notifications. Egnyte is very focused on the enterprise and has improved its analytics and reporting capabilities and its focus on business continuity, which allows content to be stored in the cloud and on-premise. Egnyte integrates with Microsoft Office 365, Google Apps, Salesforce, and others.

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<td>Mobile First approach</td>
<td>Market awareness</td>
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<td>Online and offline content support</td>
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<td>Business continuity via cloud and on-premise storage</td>
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<td>Vertical Use Cases</td>
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Syncplicity

Syncplicity, based in Santa Clara, was sold by EMC to Skyview Capital in July 2015. Syncplicity offers one of the most intuitive user interfaces in MCM and in 2015, they have made it easy to integrate with other MCM Platforms via their Panorama Release. Syncplicity has also been making it easy to integrate with mobile apps via their APIs and developer edition, a capability that leading MCM providers have been focusing on.

Syncplicity has also been focusing on a number of use cases including, but not limited to, Financial Services, Energy, Life Sciences, and Government. The lack of access to the EMC Sales Channel will be one of the go-to-market challenges Syncplicity will have to overcome.

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<th>Strengths</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>User interface</td>
<td>Sales Channels</td>
</tr>
<tr>
<td>Document security, including rights management</td>
<td>Awareness outside of the US</td>
</tr>
<tr>
<td>Policy management options</td>
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<tr>
<td>Support for Office 365, Box</td>
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</table>
WatchDox by BlackBerry

WatchDox was acquired by BlackBerry in April 2015 to bolster its overall approach to document security. While WatchDox has been deployed in some of the more sensitive document application areas, it has continued to push the envelope with new capabilities, such as its Spotlight document viewer that blurs content users should not be able to see. It offers the ability to manage content in the cloud as well as on-premises, which is an important buying criterion for security-conscious buyers. Given their multiple Cloud Deployment Options (Public, Private (On-Premise)), WatchDox is a great fit for the types of security-conscious buyers that BlackBerry is targeting.

BlackBerry indicated that they plan to offer WatchDox as a stand-alone offering as well as part of BES12. This will give them an easier go-to-market path. However, BlackBerry will face the challenge of continuing to innovate in MCM, which is a fast moving market with a growing number of casualties.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
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</thead>
<tbody>
<tr>
<td>Blackberry Brand</td>
<td>Awareness outside of US</td>
</tr>
<tr>
<td>Document security</td>
<td></td>
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<tr>
<td>DRM support</td>
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<tr>
<td>Ease of use</td>
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</table>
Specialists

Hightail

Hightail, which helped to pioneer File Sharing for Creative and Marketing departments, has gone back to its core user base – the Creative Professional. 2015 featured more management changes with the return of Ranjith Kumaran, who founded Hightail in 2004.

Additionally in 2015, Hightail introduced Creative Spaces, which allows users to collaborate on files they are working on together. Hightail has historically been known for its strength in sharing large files, which is one of the major reasons users need to turn to MCM offerings. Hightail offers integrations with SharePoint, Salesforce, NetSuite, Outlook, and a variety of ECM products.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
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<tbody>
<tr>
<td>Support for large files</td>
<td>Brand recognition</td>
</tr>
<tr>
<td>Ease of use</td>
<td></td>
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<tr>
<td>Pricing</td>
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Intralinks

Intralinks, based in New York, has built its business around Secure Deal Rooms. Given the never-ending pace of Merger and Acquisitions, the demand for Secure Deal Rooms is increasing. At the same time, competitors have recognized this and are also beginning to offer Deal Room capabilities. In 2013, Intralinks launched Intralinks VIA which supports secure collaboration and enterprise file synchronization and sharing across enterprises, primarily in highly regulated and IP-intensive industries.

Intralinks VIA is accessed through a private cloud, with data centers in the U.S., U.K., Germany, and Australia. Features like integrated, plug-in free information rights management (IRM) technology and support for customer-managed encryption keys (CMK), help address information security and data privacy concerns. Intralinks’ hybrid architecture, which is based on distributed content node, is designed to enable the ability to control the physical location where their data is both stored and processed.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deal Room feature leadership</td>
<td>Integration with other MCM Repositories</td>
</tr>
<tr>
<td>Ease of PDF annotation</td>
<td></td>
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<tr>
<td>Support for Office 365 file formats</td>
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<tr>
<td>Data sovereignty, geolocation, plug-in free IRM, and encryption keys</td>
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</table>
SpringCM

SpringCM, based in Chicago, IL, has shifted its focus to compete in the growing arena for Sales Content Management, with a particular focus on both Sales Enablement and Contract Management. The digitization of the selling process is one of the biggest business growth areas, which reinforces SpringCM’s strategic move.

SpringCM offers a robust set of capabilities that enable content to be accessed and acted upon from multiple devices. SpringCM’s dynamic and predictive capabilities in Salesforce enable sales executives to have the right content at their fingertips at the right point in an opportunity pipeline. These features, in addition to their Contract Management capabilities, make them a solid choice for Sales Organizations.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Breadth of functionality</td>
<td>• Awareness outside of North America</td>
</tr>
<tr>
<td>• Salesforce integration</td>
<td></td>
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<tr>
<td>• Predictive content</td>
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<tr>
<td>• Contract Management</td>
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</tbody>
</table>
Aragon Advisory

- Enterprises need to look at Mobile Content Management providers carefully, particularly around ease of use and future product roadmaps.
- Enterprises should turn on security settings for encryption and Information Rights Management for certain documents and classes of users.
- Enterprises should realize that MCM will go through a consolidation phase over the next 36 months.

Bottom Line

The Mobile Content Management market is entering into a consolidation phase. Security is now front and center as a feature set, and enterprises need to recognize and leverage the security foundation that many of the providers featured in this report offer. Enterprises should look at how content can be used inside of business processes, including Mobile Apps, as a way to increase the velocity of the business.