

# Magic Quadrant for Managed File Transfer

Gartner RAS Core Research Note G00170848, L. Frank Kenney, 18 September 2009, R3183 09232010

**The perfect storm of compliance, risk, governance and performance has caused vendors in the managed file transfer space to segment and specialize. Still, there are enough commonalities to make “apples to apples” comparisons.**

## WHAT YOU NEED TO KNOW

This document was revised on 25 September 2009. For more information, see the [Corrections](#) page on gartner.com.

Companies should consider managed file transfer (MFT) suite vendors that meet short-term tactical and long-term strategic needs. It's all too easy to react too quickly and procure and deploy technology that supports only one protocol or security standard. It's much more prudent to deploy a product that can be easily expanded and upgraded to handle multiple protocols and multiple standards in a governed way that is fully auditable.

## MAGIC QUADRANT

### Market Overview

As an increasing amount of technology providers augment and enhance their products, marketing and messaging to suit the explosion of interest in the MFT solutions market, Gartner has steadily increased the amount of vendors we track in this particular research agenda. Today, Gartner actively tracks more than 45 vendors in this market segment. These vendors deliver solutions using a wide range of deployment options, including the use of the cloud services, appliances, virtualization and stand-alone software. Additionally, some of these vendors focus exclusively on traditional system-to-system file-based integration (internal and external) or the emerging people-to-people file-based integration facilitated by sending files via e-mail, using shared folders or very basic FTP server applications (governing collaborative and productivity suites). Gartner recommends that companies seeking MFT technologies look beyond vendors specializing in one or the other, and include the vendors that have done a credible job of integrating both disciplines. In some cases, this functionality will be delivered via a partnership reseller or OEM, while in other cases (such as with acquisitions), integration has happened and will continue to happen.

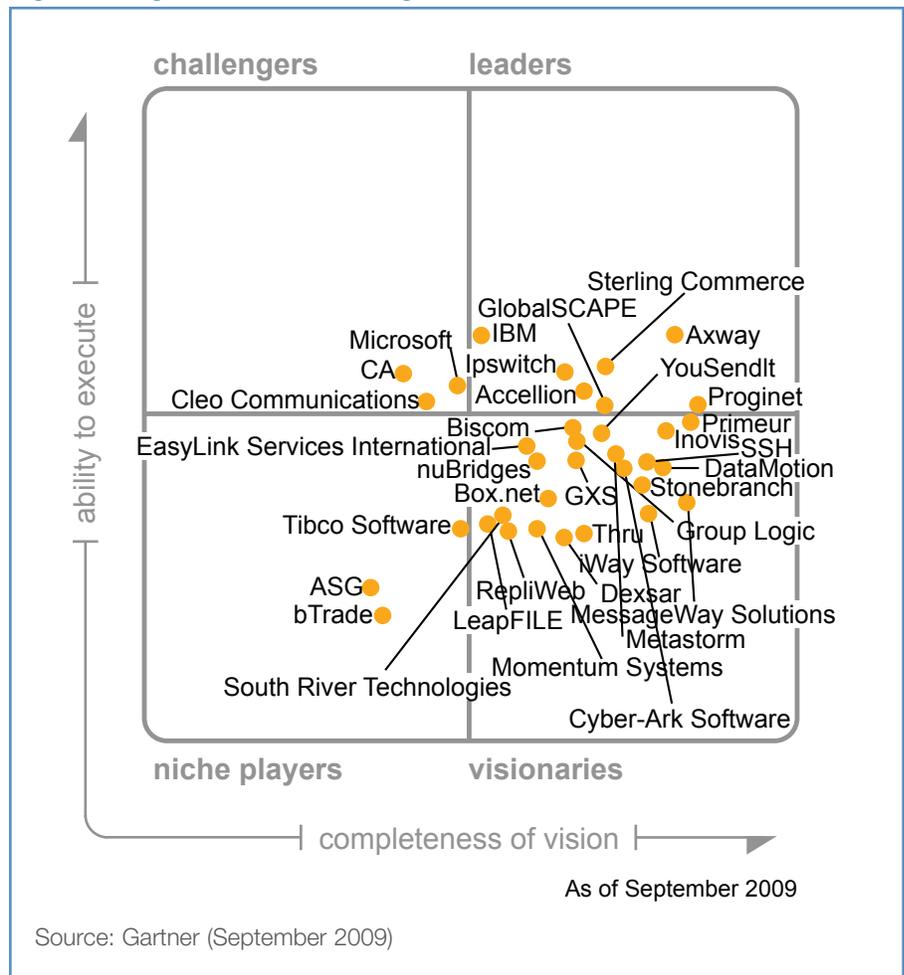
In fact, many enterprise knowledge workers have been dealing with issues around the movement of their large files for quite some time. Sometimes users will get a message from the e-mail administrator letting them know that their file is too big to be sent, or that the recipient's e-mail system will not allow certain files or file sizes. Knowledge workers are then faced with the daunting task of getting the e-mail administrators to change their settings (not likely) or turning to third-party technologies and ad hoc processes to facilitate collaboration. These third-party technologies may come in the form of cloud services, online storage,

personal e-mail accounts with vendors that allow larger files to be sent (Google Gmail, Microsoft Live and Yahoo Mail), or physical media, such as burning a DVD or using a Universal Serial Bus (USB) memory device. Regardless of the mechanism and process the knowledge worker uses, it is a good bet that most companies do not have the governance processes and mechanisms for enforcement of those processes and policies in place, with regards to how knowledge workers collaborate. As a result of this activity, some MFT vendors have been looking at ways to include extending their governance technologies into the collaborative activities mentioned above and more-formalized collaborative and content management suites.

As with any market with growing visibility, Gartner has seen the entrance of major infrastructure vendors, such as IBM and Microsoft. Software AG and Attachmate (not yet included in this Magic Quadrant) are poised to offer solutions based on the pieces of the Proginet portfolio to their installed bases, thus strengthening their strategy of MFT being an integral part of any integration initiative. Other vendors, such as Box.net, DataMotion, Dexsar, Inovis, LeapFILE, Thru and YouSendIt, have adopted a cloud-service approach, which will initially attract companies looking to better govern the collaborative activity of their knowledge workers. While the value proposition of cloud-based MFT is strong and the focus on the business user is strong, there continues to be difficulty in attracting IT organizations and using the technology for more-traditional MFT activity, such as mainframe to a distributed network or internal hub to external spoke MFT. These solutions do have on-premises elements, such as lightweight adapters and proxies, used in conjunction with applications like e-mail that can help these service providers articulate the value of hosted MFT to enterprise IT stakeholders.

The changes to this year's Magic Quadrant for MFT represent changing key trends that have propelled visibility into this market and its vendors, and the ways in which these trends forced technology providers to respond to new requirements. Some vendors have been successful, and others have not. Leaders today may be challengers or niche players in subsequent Magic

Figure 1. Magic Quadrant for Managed File Transfer



Quadrants and vice versa. Regard each vendor's strengths and challenges as an indicator of Magic Quadrant direction. Last year's Magic Quadrant criteria was heavily weighted to reflect the importance of the technical aspects of MFT, such as secure communications and related protocol support. This year's Magic Quadrant criteria is weighted to reflect the importance of governing the file transfer in its many forms, including the integration of independent systems and the collaboration between people (governed integration and collaboration). This realignment of weighting allows users of the Magic Quadrant to compare offerings from vendors, regardless of deployment model, and, as with most markets, this year's Magic Quadrant tells several stories:

The Magic Quadrant is copyrighted September 2009 by Gartner, Inc. and is reused with permission. The Magic Quadrant is a graphical representation of a marketplace at and for a specific time period. It depicts Gartner's analysis of how certain vendors measure against criteria for that marketplace, as defined by Gartner. Gartner does not endorse any vendor, product or service depicted in the Magic Quadrant, and does not advise technology users to select only those vendors placed in the "Leaders" quadrant. The Magic Quadrant is intended solely as a research tool, and is not meant to be a specific guide to action. Gartner disclaims all warranties, express or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

© 2009 Gartner, Inc. and/or its Affiliates. All Rights Reserved. Reproduction and distribution of this publication in any form without prior written permission is forbidden. The information contained herein has been obtained from sources believed to be reliable. Gartner disclaims all warranties as to the accuracy, completeness or adequacy of such information. Although Gartner's research may discuss legal issues related to the information technology business, Gartner does not provide legal advice or services and its research should not be construed or used as such. Gartner shall have no liability for errors, omissions or inadequacies in the information contained herein or for interpretations thereof. The opinions expressed herein are subject to change without notice.

The continued dominance of Axway and, to a lesser extent, Sterling Commerce: These two vendors continue to effectively sell complete MFT suites and services at a higher price (more than \$500,000) than other vendors, and often to high-level IT executives, by predicting return on investment and demonstrating the value of MFT as an essential part of a company's enterprise nervous system. Not surprisingly, these vendors are front and center in discussions about the next phenomenon in the MFT market: private cloud enablement.

The emergence of Proginet as a leader that is actively changing the landscape of the MFT space by enabling key infrastructure players, such as Software AG, Attachmate, Inovis and Beta Systems, to compete against other MFT vendors. All aspects of Proginet's portfolio have been or will be leveraged in partnerships, reseller agreements and OEM agreements. It is safe to assume that the Proginet business model is enabling third-party infrastructure vendors (such as service-oriented architecture [SOA] backbone, data integration and B2B gateway vendors) to offer clients robust MFT capabilities. Even in the event of an acquisition, the Proginet technology will remain valuable and the acquirer is likely to have a significant influence in the MFT space.

IBM's entry into the MFT space has been a long time coming (IBM's current and former MFT partnerships have been very lucrative, including two of the visionaries in this market, Metastorm and Primeur). Surprisingly, however, there is little immediate recognition of IBM's technology, based on WebSphere, as a valid and worthwhile solution for many companies' MFT needs; we continue to see IBM's MFT technology in MFT replacement deals. That said, IBM is playing "catch up" with the established leaders in this market.

Accellion's and Ipswitch's ability to execute has excelled in the latter half of 2008 and the first half of 2009. Accellion, known for e-mail offloading, has leveraged its success with ad hoc file transfer and relationships with IT executives, and is currently offering a combination of appliance technology and virtualized technology (both deployed on-premises), and a cloud-based solution that allows companies to govern and move responsibility for file transfers transparently. Given its credibility at the senior IT level, Accellion has become a trusted advisor to its clients with regards to MFT, allowing it to bypass RFPs and proof-of-concept trials. Ipswitch has fully integrated its 2008 acquisition of Standard Networks, while becoming a fixture on RFPs not just in its target market (\$15,000 to \$75,000), but also for companies deploying MFT in a utility model. This is a far cry from two years ago, when Ipswitch struggled to be perceived as offering more than downloadable, consumer-focused technology.

Vendors such as Biscom, Cyber-Ark Software, DataMotion, Group Logic, iWay Software, Metastorm, SSH and Stonebranch are better-known for other elements of their portfolios. They have come to realize that there is a substantial opportunity in the MFT market. Each of these vendors has committed resources to marketing and messaging MFT technologies, along with the other parts of their portfolios and the integration of those technologies, to the larger MFT market.

Vendors such as Aspera, Comcast Media Center, Savvis and Signiant are dominating industry-specific markets with MFT suites that squarely focus on value-added file services, such as high-speed delivery, data loss prevention, digital asset management and partner provisioning. Rather than marketing and selling a horizontal product in the MFT space, these vendors have chosen to sell value-added file services and to view MFT as an enabler of those services.

All these vendors compete at various levels in the entertainment and media vertical, but boast a slew of customers and other verticals, thus full inclusion in the MFT market is inevitable. Given this circumstance, vendors in the MFT market should continue to closely monitor the vendors noted above because they have successfully demonstrated how to effectively develop, market and sell value-added file services to the enterprise.

### Market Definition/Description

The foundation of these "services" that help enable governance is composed from the evolving technology functions (i.e., workflow, secure communications, provisioning, streaming input/output [I/O] and transformation) that have been core to the MFT suite. These technologies also make up part of the foundation of the B2B gateway, which can be used for multienterprise and internal application integration. One key differentiation that is becoming evident is the ability of MFT suites to elegantly "plug into" and support systems used for collaboration (the exchange of information between knowledge workers), regardless of the sophistication and formality of those tools. Companies' needs for MFT have evolved into more-holistic requirements that include the ability to provide a set of services that enable various governance processes and policies related to the management, coordination and trust of the file transfer. These services include:

- Visibility, which is a key first step to identifying the process, systems and people affecting and being affected by messages, files and transactions
- Monitoring and management that enables companies to proactively and reactively track messages, files and transactions as they flow through systems and between people
- Enforcement to provide the ability to address policies around performance, risk, identity, access and authentication issues
- Reporting and auditing to enable companies to compile and assemble data related to all aspects of messages, files and transactions specific to user needs
- Provisioning to enable companies to rapidly onboard systems, companies and individuals, and to continually manage all aspects of change
- Validation to enable companies to design, test and execute processes associated with file transfer

## Inclusion and Exclusion Criteria

The criteria for inclusion in this Magic Quadrant are marketing, selling and deploying a solution for purely MFT. Additionally, the solution should not be just a feature, but a distinct product with a corresponding stock-keeping unit number, audience and revenue that can be easily broken out in the vendor's financial records. Although there are some exceptions, the vendors in this Magic Quadrant have a minimum of \$5 million in annual revenue.

### Added

Vendors included in the MFT Magic Quadrant that were not included in the previous iteration include:

- Cleo Communications
- bTrade
- Box.net
- DataMotion
- Dexsar
- EasyLink Services International
- Group Logic
- GXS
- IBM
- Microsoft
- Momentum Systems
- Metastorm
- South River Technologies
- Tibco Software
- Thru

### Dropped

Vendors included in the previous iteration of the MFT Magic Quadrant that are not included in this most-recent version include:

- Radiance Technologies

## Evaluation Criteria

### Ability to Execute

Gartner analysts evaluate technology providers on the quality and efficacy of the processes, systems, methods and procedures that enable IT provider performance to be competitive, efficient and effective, and to positively affect revenue, retention and reputation.

**Table 1. Ability to Execute Evaluation Criteria**

Evaluation Criteria	Weighting
Product/Service	high
Overall Viability (Business Unit, Financial, Strategy, Organization)	high
Sales Execution/Pricing	standard
Market Responsiveness and Track Record	high
Marketing Execution	high
Customer Experience	standard
Operations	standard
Source: Gartner (September 2009)	

### Completeness of Vision

Gartner evaluates technology providers on their ability to convincingly articulate their current and future market direction, innovation, customer needs, competitive forces and how well they map to the Gartner position. Ultimately, technology providers are rated on their understanding of how market forces can be exploited to create opportunities for them.

**Table 2. Completeness of Vision Evaluation Criteria**

Evaluation Criteria	Weighting
Market Understanding	high
Marketing Strategy	high
Sales Strategy	standard
Offering (Product) Strategy	high
Business Model	standard
Vertical/Industry Strategy	standard
Innovation	high
Geographic Strategy	standard
Source: Gartner	

## Leaders

Leaders in the MFT market are most likely to have high revenue and commitment to the market, high market share and installed bases, and products that are of interest to a large audience. In many cases, these vendors have long histories in this market. However, new leaders in this market are demonstrating the ability to introduce new technologies and strategies, such as governing collaboration, or have demonstrated the ability to reach newer market segments, such as small or midsize businesses (SMBs). Finally, leaders have presented domain expertise and compelling messages that have penetrated the market (intentionally or unintentionally).

## Challengers

Challengers have focused significant resources in this market, but they have a narrower understanding of it and a less-impressive product strategy, or they've deliberately chosen to limit the scope of their product lines. For example, vendors that service the SMB space primarily provide support for one or two protocols, such as FTP, and security mechanisms, such as encryption.

## Visionaries

Visionaries understand the market and customer requirements well, but have fewer assets available or committed to the pursuit of this particular market than leaders. Specific to the MFT suite market, visionaries offer the functionality requirements often requested by Type A companies, such as an SOA with interoperable interfaces, business process management (BPM), and an integrated service environment for design and modeling. However, many visionaries compete in multiple markets, trying to balance and juggle resources and marketing messages.

## Niche Players

Niche players are limited to a particular geographical or industry segment, or have a smaller range of features or resources that, when taken together, preclude them from competing across the board in many major segments of this market. We expect that various vendors that specialize in content and extraction, transformation, and loading will enter this quadrant and quickly move into the Challengers quadrant.

## Vendor Strengths and Cautions

### Accellion

#### Strengths

- Accellion continues to execute well in e-mail attachment offloading and ad hoc communications, enabling it to become a trusted partner to business leaders and decision makers who are increasingly "footing the bill" for MFT initiatives.
- The vendor has taken advantage of cloud computing, offering customers a true hybrid strategy with MFT.

#### Cautions

- Although Accellion offers more capabilities than just e-mail offloading, it continues to be considered as offering an ad hoc solution.
- The vendor must increase its "ecosystem" of partners, and work with third-party BPM and integration technologies to increase visibility of file transfers to other technologies managing business processes.

### ASG

#### Strengths

- ASG continues to leverage an installed base of system management and infrastructure management tools.
- The vendor's wide geographic reach gives it the opportunity to push MFT in the Asia/Pacific region.

#### Cautions

- MFT is not aggressively marketed or messaged as one of ASG's top-line messages.
- Even in companies where ASG is embedded, it does not make the shortlist for MFT initiatives.

### Axway

#### Strengths

- Axway has successfully fully integrated its acquisition of Tumbleweed into all aspects of the Axway business, including the sales, marketing and executive teams.
- The company has also successfully leveraged Tumbleweed assets and strategies to build up and execute lower-market and midmarket marketing and sales. Axway's MFT personas, scenarios and patterns have proved popular, and allow for rapid deployment and return on investment.

#### Cautions

- As a recognized leader in MFT, Axway has not communicated a credible long-term technology road map, which should include larger issues of cloud computing and service centrality.
- The vendor must increase the speed of its integration efforts between Tumbleweed Secure Transport and the larger and more technically savvy Synchrony brand of products.

## bTrade

### Strengths

- The bTrade brand is well-established, with customers using the technology for B2B activity.
- Although the vendor is technically a new entity, executive management has expertise in managing and growing a MFT/B2B company.

### Cautions

- While the bTrade offering has been consistent and the client base has grown, new ownership will have to execute well and demonstrate vision and thought leadership to regain leadership in this and peripheral markets, such as B2B gateways.
- The vendor will have difficulty leveraging the existing installed base, as it is likely using other MFT technologies, making displacement and migration a difficult strategy for growth and success.

## Biscom

### Strengths

- Biscom continues to leverage a large installed base of facts and print users as key sales opportunities for MFT solutions.
- The company also continues to build and deploy plug-in technology, enabling various collaborative applications for MFT.

### Cautions

- Brand recognition needs to increase because Biscom is still not generally considered in many RFPs beyond its customer base.
- Biscom needs better address application and system integration via MFT. Today, most of the vendor's activity has been around managing collaborative MFT.

## Box.net

### Strengths

- Impressive enterprise client list using Box's MFTaaS offering for both governed collaboration and integration.
- Executive management with extensive cloud expertise in marketing and business/revenue generation

### Cautions

- Box.net receives less attention than YouSendIt and free services. While the vendor has created some differentiation in the eyes of customers, it needs to do the same with prospects and the market overall.

## CA

### Strengths

- CA has, once again, started to invest in its MFT product line around process control and visibility.
- The vendor's MFT customers continue to leverage the technology in mission-critical processes, giving computer associates the opportunity to build new reference accounts and case studies highlighting newer functionality.

### Cautions

- CA must consider partnerships, acquisitions and reseller agreements to address the growing need for ad hoc/collaborative file transfer.

## Cleo Communications

### Strengths

- Cleo Communications is still a go-to vendor for adapters and protocol support for B2B initiatives that require the use of current integration technology.
- The vendor's MFT solutions have a low learning curve, are easy to deploy and have attractive price points, enabling companies to quickly build communities of partners using MFT.

### Cautions

- Cleo Communications is frequently brought into the MFT procurement process during the latter stages, and often as a protocol augmentation to other B2B/MFT solutions.
- The vendor's stand-alone MFT solutions are not as aggressively marketed and messaged as other elements of its portfolio.

## Cyber-Ark Software

### Strengths

- Cyber-Ark Software's success in various security markets has funded its continued development and innovation of MFT technologies, focusing not just on security, but also management and monitoring functionalities.
- The vendor's Inter-Business vault is simple to provision, maintain and extend to external partners and systems. It also addresses the governance of data and information at rest as well as in motion.

### Cautions

- As with any smaller company that must maintain a presence in multiple markets, Cyber-Ark Software struggles to effectively market and message its technologies and methodologies around MFT.

## DataMotion

### Strengths

- DataMotion's growing ecosystem of partners allows it to MFT-enable a wide range of business applications and third-party middleware and infrastructure technologies.
- The vendor actively invests in and markets a hybrid strategy of MFT. It has effectively blurred the line between on-premises solutions and cloud services.

### Cautions

- Continued executive churn has plagued DataMotion, often resulting in marketing and messaging challenges.
- A recent rebranding effort, from CertifiedMail, has been underwhelming at best. Gartner has received virtually no feedback on the impact of the change of name, change of strategy and change of direction.

## Dexsar

### Strengths

- Dexsar is specializing in governing collaboration in on-premises and cloud service form factors.
- The vendor's drag-and-drop capabilities reduce the need for knowledge workers to change their processes or learn new ones with regard to MFT.

### Cautions

- The vendor must recognize that governing integration is just as important as governing collaboration.
- Understandably, Dexsar has chosen to invest in the latter, but must also deliver a solution for the former; even if that solution is provided via a partnership or reseller agreement.

## EasyLink Services International

### Strengths

- EasyLink Services International's integration service provider model gives it an edge when it comes to creating, documenting and enforcing service-level agreements with customers.
- The vendor has an impressive list of customers that it can leverage to build up its MFTaaS business.

### Cautions

- MFT is not just for B2B communications, but is also critical for internal communications, and EasyLink Services International

must find a way to convince customers of the opportunities that exist when leveraging services for internal and external file transfers.

- Governing collaboration, especially between external partners, is an excellent opportunity that the vendor must exploit.

## GlobalSCAPE

### Strengths

- GlobalSCAPE has a broad solution portfolio, including managed and ad hoc file delivery (on-premises and SaaS), and continues to execute winning, high-profile sales to the U.S. Army and other government agencies.
- The vendor continues to invest in, and receive, industry certifications and validations (Federal Information Processing Standards [FIPS] and others) that give it the chance to compete in large MFT opportunities and, in many cases, be shortlisted for those opportunities.

### Cautions

- GlobalSCAPE needs to better message its governance technologies, especially those around visibility and enforcement, and how those technologies can and should be integrated with third-party middleware and governance technologies.

## Group Logic

### Strengths

- Group Logic has a 14-year history in file transfer software enabling machine-to-machine, person-to-person and mixed person/machine transfers, and is one of the few vendors addressing MFT for both the Apple Macintosh platform and the Microsoft Windows platform.
- The vendor has invested heavily in an SQL-based architecture that drives a range of technologies to deliver end-user ease of use, support provisioning and governance of the data, and to provide automation, analytics and reporting features.

### Cautions

- As with other companies entering the MFT space from the collaboration world, Group Logic has to show differentiation and clear thought leadership. Its combination of provisioning/governance tools and Macintosh file transfer capabilities are a great beachhead that demonstrates thought leadership.
- Group Logic needs to expand its reach by marketing and messaging around its extended functionality, such as its centralized monitoring and management tools.

## GXS

### Strengths

- As one of the largest and most widely used B2B integration service providers, GXS has the opportunity to crisply articulate what it means to be an MFTaaS provider. The vendor's network provides a variety of value-added services, from transformation to business intelligence, all of which can be combined with basic file transfer capabilities.
- GXS has also made the investment in strengthening its data centers and even incorporating the use of third-party cloud storage providers to continue to meet and exceed the service-level agreements of its tens of thousands of customers.

### Cautions

- GXS has traditionally been involved with managing the exchange of information between companies and their applications. Managing the exchange of information between knowledge workers requires different methodologies and technologies, including those typically found in some collaborative applications. GXS has to minimally partner on (and preferably acquire or build) this required technology.

## iWay Software

### Strengths

- iWay Software continues to heavily market its MFT solutions in conjunction with other integration functionality, such as transformation, multiprotocol support and adaptation with existing business applications, such as SAP and Oracle.
- The vendor also continues to leverage its large installed base for MFT.

### Cautions

- Although leveraging its massive installed base, the vendor needs to better deliver a message that encourages the use of its technology either as a stand-alone model or in third-party environments.

## IBM

### Strengths

- Leveraging an intense and thorough beta testing process, IBM came to the market with numerous, referenceable customers for its file transfer products. This allowed IBM to quickly gather new prospects from its installed base and execute in the MFT market. The next logical step for IBM is to enhance other products in its WebSphere and Lotus Notes/Lotus Connections portfolio with MFT capability. This would mark a huge step for IBM, as the Lotus brand offers a popular e-mail/collaborative suite.

### Cautions

- Mediation between WebSphere MQ and other transport protocols requires the use of a separate WebSphere product or third-party technology. IBM is resolving that challenge in a future update. In addition, mediation between WebSphere MQ and other transport protocols requires the use of a separate WebSphere product or third-party technology. IBM is resolving that challenge in a future update.

## Inovis

### Strengths

- No other vendor has been as much of a proponent of the hybrid strategy of software and service as Inovis. The vendor has shown that it has the ability to articulate the benefit of the strategy with B2B integration, and should have little difficulty doing the same with MFT.
- Inovis has the opportunity to build and deliver easy to use, yet complex and fully functional, provisioning technology. The vendor can deliver this as a set of services or in a stand-alone product. Provisioning is the key to large-scale deployments of communities that collaborate.

### Cautions

- The recent partnership with Proginet has shown that Inovis understands that it needs better solutions for governing collaboration, particularly when that collaboration happens in an e-mail environment. However, an OEM or partnership agreement will not be enough. With the large number of vendors offering this technology, and the relatively small size of those vendors, Inovis should look for acquisition opportunities.

## Ipswitch

### Strengths

- After the transparent acquisition of Standard Networks, and the inclusion of those technologies in its larger portfolio, Ipswitch has successfully executed in the MFT space, appearing on many shortlists for procurement by companies of all sizes.
- Ipswitch has successfully realigned its business units so that it can better deliver technology to its customers. R&D, marketing and administration are now aligned with and the responsibility of one business unit. This has created agility and the opportunity for the vendor to show revenue growth in the MFT market.

### Cautions

- Although decreasing, there remains a substantial portion of Ipswitch revenue that comes from the consumer market. Gartner expects that market to quickly become consumed by vendors offering cloud services for MFT. Ipswitch must not only embrace this model, and offer its own set of cloud services, but

it also must decrease its percentage of revenue from consumer technology to insulate itself from the impact of cloud services.

- Architecturally, Ipswitch must do more to further align itself with the concepts of service centricity. It must adopt a more modular approach to its architecture to rapidly meet the needs of its customers and quickly respond to competitor threats in the form of new features and functionality.

## LeapFILE

### Strengths

- The use of cloud infrastructure allows LeapFILE to scale to meet the demands of millions of customers.
- New collaborative capabilities attempt to fill the gap between how knowledge workers use e-mail and more-complex heavyweight solutions like SharePoint.
- LeapFILE leverages its MFT capabilities to address larger issues, such as corporate and data governance.

### Cautions

- LeapFILE needs to increase its brand recognition and marketing to successfully compete against larger service providers and keep smaller service providers at bay.

## MessageWay Solutions

### Strengths

- Fully service-centric architecture allows MessageWay Solutions to quickly update and enable new features and functionality.
- The deployment and administration of the vendor's offering lends itself to large-scale enterprise deployments. This is important as companies start to create their own private clouds and understand the benefit of including MFT in those utilities.

### Cautions

- MessageWay Solutions is still a fairly small company, and, while it has had success with large deals, its brand and name recognition is still minimal, keeping it off of many shortlists.

## Metastorm

### Strengths

- The inclusion of world-class BPM technology with Metastorm's MFT technology allows companies to truly compose complex processes that involve file transfer.
- Architecturally, Metastorm's products can be easily integrated with most enterprise service buses and business applications, enabling companies to MFT-enable their infrastructures.

### Cautions

- Bringing this technology to collaborative products is a key opportunity for Metastorm, but it remains primarily focused on the BPM space.
- The perception of the vendor in the MFT space as being "only an IBM partner" still permeates the market. Metastorm needs to refocus some resources on marketing its stand-alone MFT suite.

## Microsoft

### Strengths

- The ubiquity of Microsoft Office Groove (as part of the Office suite of technologies) allows companies looking for a tactical, easy-to-implement solution to experiment with MFT for governing collaboration.
- Although not confirmed, including Groove in the SharePoint suite would allow Microsoft to quickly grow its market share in the MFT space.

### Cautions

- Microsoft lacks MFT capability with its traditional integration products, such as BizTalk.
- The vendor also lacks MFT capability included in the Windows operating system.

## Momentum Systems

### Strengths

- Deep expertise in Microsoft environments enables Momentum Systems to leverage the shortcomings of the Windows environment with respect to MFT.
- The vendor provides users with an easy-to-use, robust composition environment to allow complex processes involving MFT.

### Cautions

- Momentum Systems is rarely seen outside of Microsoft environments. Given its expertise in business process, the vendor should leverage the opportunity to provide thought leadership on the importance of MFT with respect to BPM.

## nuBridges

### Strengths

- Its focus on the data at rest and the data in motion allows nuBridges to deliver solutions that are more closely aligned with the business processes that entail file transfer.

- The vendor offers strong executive management, with an expertise in MFT and B2B solutions for multiple platforms and enterprises of all sizes.

#### Cautions

- Although, Gartner expects that nuBridges will push its new MFT suite as aggressively as it pushed its new security products, the vendor has not effectively messaged its entire portfolio of products that work in and around MFT to the MFT market.

#### Primeur

##### Strengths

- Primeur has a strong presence in Europe, the Middle East and Africa, and alignment with IBM WebSphere and IBM Global Services Group.
- The vendor's service-centric architecture allows Primeur to offer rapid value-added file services, including functionality for iPhone and Android platforms. This service centricity also allows the vendor to market and sell its technology in logical bundles based on, among other things, SOA maturity.

##### Cautions

- Although Primeur has demonstrated that it can and does sell beyond IBM deployments, the market still perceives this vendor as solely an IBM enhancement.
- Primeur has made some inroads in North America and the Asia/Pacific region, but will have to commit additional resources to these areas or establish credible sales channels and/or partners.

#### Proginet

##### Strengths

- Proginet has undergone, and has been successful with, changing its business model from traditional sales to OEM sales. Given the number of data and integration middleware and business applications without MFT functionality, Proginet can become the MFT enabler of choice when companies have infrastructure that needs to address MFT challenges.
- Proginet's current portfolio of technologies to enable the governance of collaborative systems and applications, high-speed file transfers, and traditional MFT make it a "one-stop shop" for all MFT needs.

##### Cautions

- The shift in business models has taken its toll on Proginet's revenue and standing in the financial markets, making it ripe for acquisition.

- Although current OEM and partnership agreements don't quite overlap, it's a matter of time before Proginet supplies the same technology to two competitors. This will call for Proginet to make hard decisions.

#### RepliWeb

##### Strengths

- RepliWeb's full portfolio allows companies to govern file transfer seamlessly between systems and people, with a centralized platform for monitoring, management and policy enforcement.

##### Cautions

- Being one of a few vendors to supply integrated MFT environments (for systems and people), RepliWeb has not leveraged this capability into providing thought leadership.

#### South River Technologies

##### Strengths

- South River Technologies offers very easy-to-use, but fully-featured hosted and on-premises solutions for governing collaboration that can be deployed into any current MFT process.
- The vendor's WebDrive and GroupDrive technologies are typically leveraged by business units, creating the opportunity for South River Technologies to sell directly to the business.

##### Cautions

- Just as governing collaboration can't be ignored, traditional MFT also cannot be ignored. South River Technologies must increase its messaging about traditional system-to-system MFT, and the intersection and integration of both styles.

#### SSH

##### Strengths

- The vendor has strong brand recognition in the security and mainframe solutions space.
- SSH's solutions have the ability to automatically discover and register ad hoc MFT and FTP processes, then further govern them from a centralized management and monitoring platform.

##### Cautions

- SSH runs the risk of being perceived as just a security protocol solutions provider.
- The vendor must also leverage its existing partnerships and ecosystem.

## Sterling Commerce

### Strengths

- Connect: Direct and Business Integration Suite continue to dominate MFT shortlists, and to drive a significant portion of Sterling Commerce revenue.
- Past challenges with the pricing models of Connect: Direct have been addressed, and negative feedback from Gartner clients has diminished.

### Cautions

- While still a fixture on most RFPs and RFIs, the vendor has not shown thought leadership consistent with a mature vendor that has a large customer base of MFT users.
- The lack of a proper MFT-as-a-service (MFTaaS) offering from Sterling Commerce is perplexing to Gartner and its clients, given the capabilities (rapid provisioning, interoperable interfaces and substantial value-added services for MFT) of the vendor's network.

## Stonebranch

### Strengths

- Stonebranch's centralized monitoring and management capabilities allow for Stonebranch to be deployed over third-party MFT servers and clients, rapidly enabling the governance of file transfer and collaboration.
- Existing partnerships and agreements with large system management vendors enables integration with a configuration management database (CMDB) and other configuration solutions extending visibility.

### Cautions

- Stonebranch is one of the newer players in the MFT space, and needs to establish brand recognition and thought leadership.

## Thru

### Strengths

- Thru is one of a small set of vendors that actively promotes and markets hybrid solutions (on-premises and cloud-based) for MFT.
- Content storage and management as a value-added file service is growing in popularity among business users of MFT.

### Cautions

- Thru is a smaller vendor with leadership potential that needs to expand on its thought leadership, partnerships, ecosystems and OEMs.

## Tibco Software

### Strengths

- Tibco Software's cloud-based solution is partially built on Active Matrix, which allows for the creation and deployment of various value-added file services.
- The vendor's established customer base has not typically solved the MFT challenge, and Tibco Software can rapidly address these clients' needs.

### Cautions

- Tibco Software has defined itself as a visionary in BPM, integration, SOA, complex event processing, integrated service environment, and as a cloud platform provider. However, Gartner feels that the vendor will be challenged to remain a visionary in the MFT space without strategic partnerships.

## YouSendIt

### Strengths

- YouSendIt has 10 million users, with 60% of them leveraging the services for governed enterprise collaboration.
- The vendor is well-funded and cloud-based, and has demonstrated thought leadership in the MFTaaS niche of the overall MFT market.

### Cautions

- YouSendIt must build a larger ecosystem of partners to further extend its technology into IT organizations.

## Vendors Added or Dropped

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

## Evaluation Criteria Definitions

### Ability to Execute

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

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

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

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

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

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

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

### Completeness of Vision

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

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

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

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

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

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

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

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