



## Insight

# Veritas Helps Organizations Become GDPR-Ready and Data-Driven with an Expanded Information Management Portfolio

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## IDC OPINION

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Veritas, a standalone information management company, is fast-executing its ambitious vision – helping organizations harness the value of business data and meet regulatory compliance. To this effect, it expanded its information management portfolio with new products such as Veritas InfoScale, Veritas Resiliency Platform, and Veritas Information Map, and it launched copy data management solution Veritas Velocity – all in 2016. These solutions help businesses delve deep into their data stores to identify, prioritize, and manage information across their organizations.

Veritas' expanded portfolio provides a holistic approach to information management, covering information protection, availability, and insight – critical hallmarks for organizations that want to become digital players and data-driven businesses. A 360° view of information management facilitates enterprises to progress faster and better in their Big Data analytics, business intelligence, and DevOps initiatives and drive confident business decisions while meeting regulatory requirements.

Information management and analytics has become strategic to digital transformation, prompting many vendors to develop holistic solutions. What distinguishes Veritas is its deeper, dedicated focus on regulations and compliance, especially the EU General Data Protection Regulation (GDPR), which will come into force in May 2018.

As a pure-play information management provider, Veritas caters to every data component of the 3rd Platform era. For example, its NetBackup, Veritas Resiliency Platform, and backup as a service (BaaS) help overcome data protection and management challenges in a hybrid cloud infrastructure. Meanwhile, its InfoScale Enterprise, InfoScale Access, and HyperScale OpenStack provide agility, portability, and control in open source environments. This includes enterprise-grade storage management and high availability for containers; scaled-out, software-defined storage for unstructured data and data management; and replication for OpenStack environments. IDC believes that Veritas' strategy to integrate newer solutions such as Velocity, Information Map, and Veritas Resiliency Platform with NetBackup 8.0 makes its "360 Data Management" vision compelling and positions it as a vendor capable of making businesses GDPR-ready.

IDC estimates that the game-changing GDPR creates a total market opportunity of \$3.5 billion for security and storage software vendors, with a short window of opportunity. While most technology providers, lawyers, and businesses have just begun to refine their GDPR-related strategies, Veritas has already woven regulatory compliance into its solutions from the design stage. We believe this helps Veritas win not only customer confidence, but also catapults it into boardroom discussions as the GDPR is a CXO issue. Its tightly integrated solutions also make brand switching difficult as businesses look to invest in stable, long-term-oriented information solutions.

## IN THIS INSIGHT

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This IDC Insight analyzes the growing importance of changing data protection regulations – in particular, the GDPR and how it takes information management out of the IT room and into the boardroom. This report also analyzes how Veritas is positioning its integrated solutions to help businesses become GDPR-ready and execute their digital transformation strategies.

## SITUATION OVERVIEW

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Digital transformation is at the center of business strategies as CEOs endeavor to capture opportunities available in the digital economy. There is a growing acknowledgement that data is at the heart of digital innovation to remain relevant in this era. IDC believes that by early 2017, 65% of global large enterprises will have committed to become information-based companies, shifting the organizational focus to relationships, people, and intangible capital. Large enterprises are increasingly looking for ways to extract and develop the value of information relative to customers, markets, transactions, services, products, physical assets, and business experiences. Transformed enterprises treat data as they would any valued asset and use it to make better decisions and optimize operations, products, and services.

Information management and governance providers grasp the strategic role of data, analytics, and real-time intelligence in the digital era. As a result, they are developing and marketing solutions and demonstrating how their offerings can make data a business enabler for digital transformation.

However, turning data into a business asset requires an even broader vision where rigid and ever-changing data protection and compliance requirements are given equal strategic importance by providers during product inception.

Data protection regulations are an evolving goalpost, and organizations need an information management architecture to remain compliant without disrupting the day-to-day business. Having a revised data protection strategy that facilitates compliance and security is more critical now than ever before for success.

### The EU GDPR and Business Implications

The GDPR has finally been approved, and the clock is ticking. Organizations have until May 25, 2018 to be ready to comply. The EU-wide regulation removes the complexities businesses currently face around complying with multiple local data protection regulations in Europe. It also makes the European data protection regulation fit and relevant to the new cloud, mobile, social, and collaborative era of business and removes barriers to market entry.

As we predicted in our report on the impact of the GDPR, there are three major implications for all organizations processing the personal data of EU citizens:

- **Heftier non-compliance fines.** The fine for non-compliance had been set at a maximum of €20 million or 4% of global revenue (whichever is higher). This takes non-compliance of personal data protection into anti-bribery and anti-money-laundering levels, making data protection a boardroom issue, not an IT issue.
- **Mandatory notification of breach.** There is no hiding place for organizations that have a breach of personal data. Mandatory breach notification rules (common in the U.S. and other countries) are now introduced to the EU. A company must notify relevant authorities within 72 hours of discovering a breach. This presents two challenges for organizations: discovering the breach quickly (most breaches are discovered months after they occur) and managing the reputational fallout after a breach. A company needs to plan for a breach and have a well-thought-out process not only for the technical remediation, but also dealing with regulator, customer, and media concerns.

- **Extra-territoriality.** The GDPR contains an extra-territoriality clause, which extends its applicability to any data processor dealing with the personal data of EU citizens. This means that, for example, this regulation is applicable to a U.S.-based cloud service provider with no physical footprint in the EU if it processes EU citizen data. Social networks, ecommerce sites, and other internet-based companies are therefore included in the GDPR.

In IDC's opinion, 17 months to identify, classify, and protect personal data is barely enough for most organizations, so most will need lots of help. We expect this to come both in the form of services (especially throughout 2017) and technology.

Vendors seeking to capitalize on this window of opportunity should remember that customers will want distinct capability to meet the specific terms of the GDPR. Simply branding products as GDPR-ready is unlikely to be sufficient or credible, and this is where Veritas' efforts shine.

Its approach to GDPR compliance begins with helping businesses identify and know where data is and then applying policies on a consistent and automated basis. Veritas' Data Insight, Enterprise Vault 12, and eDiscovery Platform, along with Information Map specifically aim to help organizations meet regulatory requirements.

Veritas Information Map and Data Insight are tools that enable businesses to delve deep into their data stores to recognize, prioritize, and manage information across their organizations. Data Insight delivers automated workflows for assessing and remediating access compliance. Enterprise Vault 12's autoclassification capabilities tag content for easier retention and faster search. Lastly, the eDiscovery Platform's predictive-coding feature delivers machine learning to streamline compliance review. In IDC's opinion, these solutions and their capabilities directly contribute to helping organizations manage rapidly increasing volumes and varieties of data across heterogeneous platforms (physical and virtual infrastructure and cloud platforms) and meet regulatory compliance.

Veritas' differentiated approach is to offer solutions that provide visibility and control of business data. IDC believes that by enabling IT teams to answer the "where," "who," and "what" of all their data, together with the ability to control data via policy in real time, is the first critical step to meeting regulatory requirements. Additionally, IDC believes that enabling more efficient feeds into Big Data/analytics projects from backups/discovery jobs is the first step toward establishing a robust data protection strategy fit for the digital age and the GDPR legislation. Getting a grip on which data is important and which is redundant, obsolete, or trivial (ROT) can help organizations distinguish data that actually needs to be backed up from data that can be archived. This also helps develop a confident, policy-based backup strategy to optimize storage and data assets. In conversations with IDC, many organizations admit they do not have insights into which data is ROT and which is not, and therefore they backup all data – including multiple copies, resulting in storage resource waste.

Backing up clean, business-relevant data can accelerate analytics projects and in turn, will prepare businesses for newer methodologies of working (such as DevOps), implement newer processes faster, rely on strong data insights, and improve speed to market.

Veritas is also looking into minimizing organizations' exposure to legal and security risks, with solutions that reduce discovery risks as well as provide resilience to security threats, rapid safe recovery, automated and policy-based access controls, and compliance.

In addition to architecting solutions from the ground up with regulatory requirements, Veritas has also invested in understanding the current information governance situation within its installed base. According to its own survey within its installed base, Veritas found that only 15% of enterprise data is business-relevant. The rest is 33% ROT data and 52% "dark data."

The problem of data management – especially the lack of visibility into what data is relevant and what is not – is only going to be amplified as data volumes and varieties continue to explode amid digital transformation. According to IDC's 2016 *Datacenter Survey*, organizations expect their data (both structured and unstructured) to grow at an accelerated pace (52%) within the next 12 months.

### **Veritas Information Map: First Step Toward Becoming Compliant, Data-Driven**

IDC sees data assessment and data identification as the first step in developing a digital-age, GDPR-ready data protection and information governance strategy. In conversations with IDC, enterprise IT has admitted its challenge is understanding which unstructured information their business owns, where it is, how much of it is valuable, which data is risky or irrelevant, and who owns it. They also express a strong desire to get a grip on business data with insights without adding more data management tools, which can further complicate their information management infrastructure. Veritas' Information Map, launched in June 2016, is an application that visualizes unstructured information. This way, IT can analyze that information, find data sets of relevance, and make informed decisions on how to manage that information set. The tool is made using Big Data technologies and features a next-generation user interface. Early adopters are already seeing significant benefits, such as an easy-to-interpret view of unstructured data globally, quick identification of ROT data, and more importantly, cost-efficient management of stale data.

IDC sees Information Map as a key part of Veritas' integrated portfolio (including NetBackup integration) focused on revealing insights. This makes Veritas well-placed to become a key technology provider to organizations that have data protection and information governance as their top investment area. What further demonstrates Veritas' deep understanding of the data management market is the tight integration of NetBackup and Veritas Resiliency Platform as well as NetBackup and Velocity. This integration instantly expands Veritas' GDPR-related total addressable market (TAM) to include existing NetBackup installed base.

There is no doubt that the GDPR is a game changer. If organizations do not know what data they hold and where it is, they will not be able to comply with it, risking their businesses. This positions Veritas as a facilitator of regulatory compliance and as a vendor that can help businesses follow good "data hygiene."

## **FUTURE OUTLOOK**

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The European data protection and recovery software market continues to hold the majority (38%) of the storage software market. It is growing steadily because of the heightened interest in data protection among European enterprises, driven by the new EU GDPR and a renewed focus on information management as a key enabler of digital transformation. IDC estimates that the European data protection and recovery segment will grow with a 4.8% CAGR until 2020 to reach \$1.8 billion. It will remain the biggest functional market in terms of revenue in the forecast period.

Veritas' vision is to create a single pane of glass across all information assets of an organization and help it effectively and efficiently manage corporate information as well as create a single control point for policies. This resonates very well with the current European market demand that IDC is seeing. In our 2015 *European Datacenter End-User Survey*, the top priorities were improving storage performance, ensuring data retention and compliance, cutting storage costs, and simplifying storage management. The survey also found that the top applications driving storage investments in Europe are backup and recovery, archiving, data governance, and disaster recovery.

However, Veritas needs to do more. In IDC's opinion, backup is essentially a transactional business, whereas information governance, ediscovery, and compliance management involves sophisticated conversations with enterprises focusing on a broader information management strategy. Veritas, post-Symantec-split, is demonstrating a strong appetite to move beyond the transactional backup business despite NetBackup being its comfort zone. It now needs to spread this vision to its partner community. Rethinking how it incentivizes its partner community and its internal account managers to channel funds beyond backup to holistic data protection and compliance will actually help it become an information management provider. However, while the top management has invigorated the new Veritas to make it relevant in the 3rd Platform era by sharing a grand vision around digital data management, falling back to its self-selling backup offerings to meet quarterly targets will be very tempting for its partner community – it needs to transcend that.

It will need to implement user feedback in future iterations of Information Map, such as the ability to take action on the data as and after it is identified by the tool. It will also need to spread awareness among enterprises wherein backup, data protection, compliance, and resilience are business issues and not IT rituals. It will then need to demonstrate how its integrated solutions can help enterprises remain GDPR-compliant and subsequently become data-driven businesses.

Its former parent Symantec is also targeting GDPR opportunities. Many may see the split as ironic in the GDPR era where Symantec and Veritas had highly complementary offerings that address compliance issues from both the information management and security points of view. Veritas will need to showcase how its technologies are agnostic, and it has an ecosystem of security vendors, channel partners, and hardware vendors to ensure organizations have holistic information infrastructures.

IDC believes that Veritas – with its rich, tightly integrated portfolio – will play a key role in shaping GDPR strategies and subsequently enabling digital enterprises. How quickly it communicates its vision to its channel partners and customers will determine its further success in the short yet lucrative window of opportunity that the GDPR has created.

IDC sees Veritas as one of the few companies that has shown real appetite in understanding the potential impact of the GDPR, and it is using it as a foundation to design and integrate solutions. This early-mover advantage and its Information Map beta tests with large enterprises positions it to own a large portion of GDPR market opportunities.

## About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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