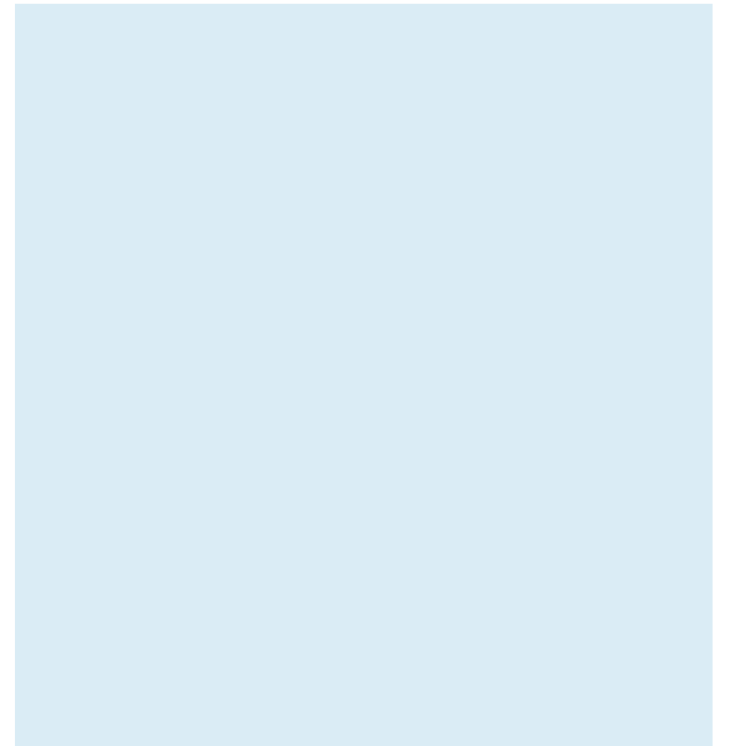
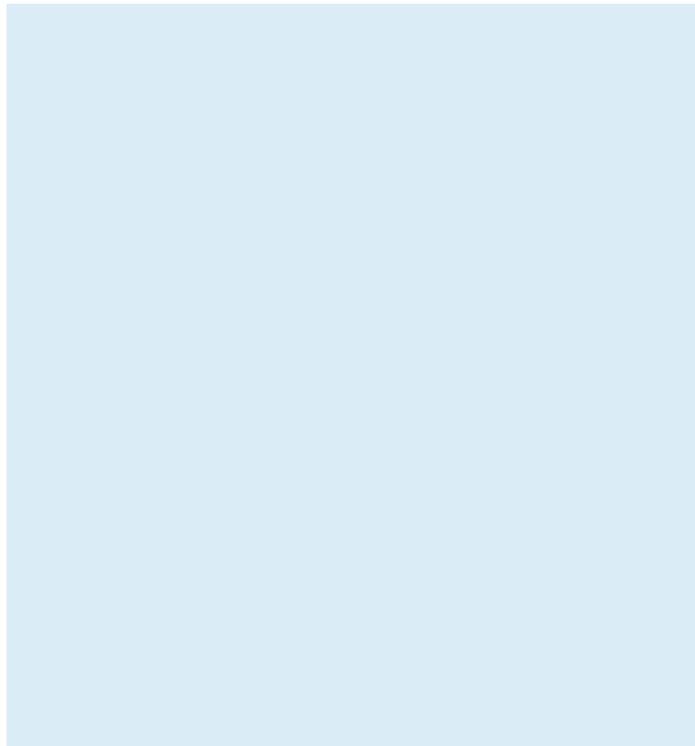
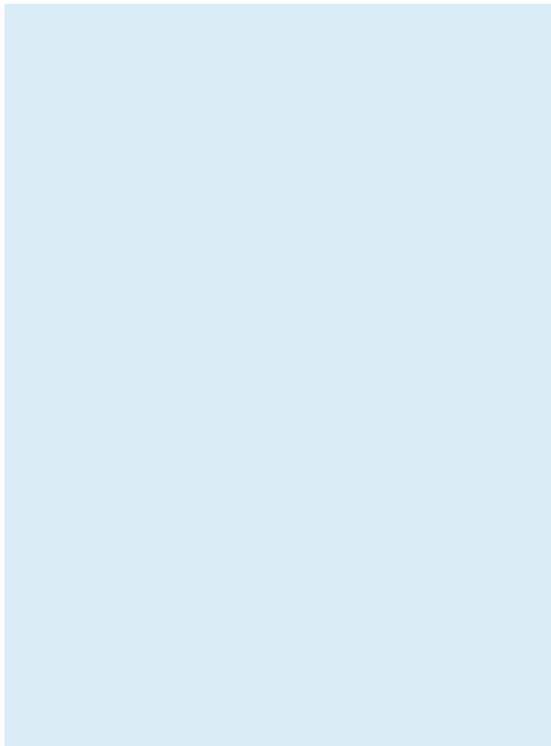




# Market Opportunity Guide

# CONTENTS



## Why Veritas?

The world's data is growing rapidly – set to reach **44 zettabytes** globally by 2020<sup>1</sup>. As a result, today's organisations face a huge challenge in managing the data that they collect and store, across increasingly complex IT environments.

In the year ahead, regaining control of business data is more important than ever. Impending changes in EU law are set to bring in more stringent rules – along with severe fines for those who fail to adhere to them.

From traditional data centers to private, public, and hybrid clouds, Veritas, together with our partner community, helps enterprises protect, identify, and manage data using intelligent information management solutions. This helps our joint customers improve their data availability and unlock insights to make them more competitive.

This guide will help you to identify opportunities to allow you to assist your customers in overcoming their data challenges and increase your revenues in partnership with Veritas.

## The Veritas Mission

Enable organisations to harness the power of their information, wherever it resides, by delivering solutions that drive availability and reveal insights.



## Why Veritas?

### We Take a 360° Approach

Our portfolio of leading enterprise data management capabilities has been proven in the most demanding and complex environments. Backed by comprehensive support our products deliver:



#### Protection

- NetBackup
- NetBackup Appliances
- Backup Exec
- Velocity
- Infoscale Availability



#### Availability

- Infoscale Storage
- Resiliency Platform
- Veritas Access
- HyperScale for OpenStack



#### Insight

- Enterprise Vault
- Enterprise Vault.cloud
- Information Map
- Data Insight
- eDiscovery Platform



## Our Approach

Working with **86%** of the Fortune 500 companies and managing some of the most complex information environments in the world has led us to three core beliefs.

These guide our approach when working with customers:

### 1. Infrastructure Availability Does Not Equal Business Uptime.

Many vendors associate uptime with hardware and infrastructure. So if an application fails, you don't find out until your customers do. Our information-centric approach ensures that application downtime never becomes customer downtime.

### 2. All Data Is Not Created Equal.

The same principle applies to storage and recovery. It costs more to store and becomes more difficult to protect, assess, and recover data when it's all given the same priority. Your customer needs to know what data is critical and what data is worthless, so they can focus on growing their business, not their storage costs.

### 3. Know What You Have And Keep Only What You Need.

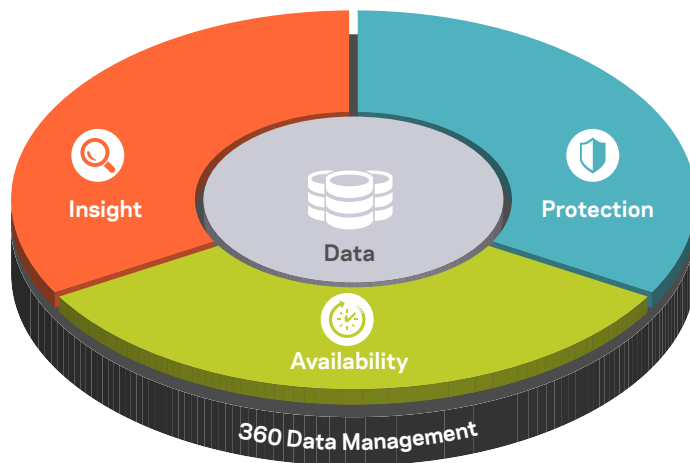
Because the value of data doesn't lie in the amount you have but in its content and ability to be leveraged. When your customer understands what they have, where it lives and how old it is, they can eliminate data that has no value and make better decisions faster.



## Solution Areas

The Veritas solutions portfolio is focused on the needs of today's businesses and designed to simplify information management.

Our products are split into three main areas:



### Information Availability Solutions

These availability solutions ensure that customers can access the data they need, whenever they need it and wherever it resides. This is vital for today's businesses, where information drives the processes that keep the business moving, including everything from essential back-end logistics to secure eCommerce payments and consumer facing websites.



### Information Governance & Insight Solutions

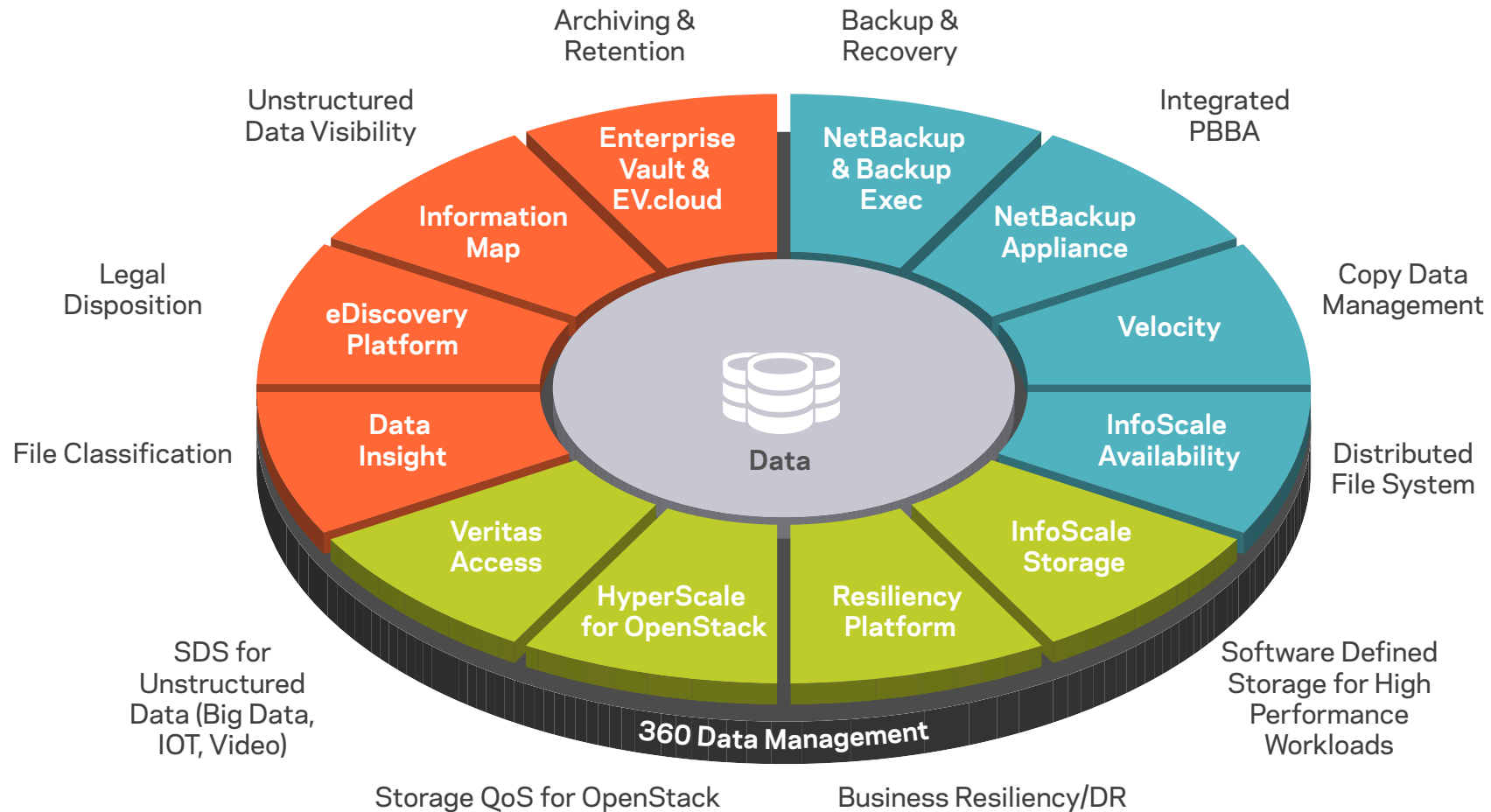
Much of the data held by organisations holds no business value, but a portion of it does, and many companies are unable to discover that value. Veritas information governance solutions help businesses to understand the data that they have, learn from their data, and leverage that knowledge to make better decisions that benefit the business.



### Information Protection Solutions

Veritas Backup and Recovery solutions enable your customers to protect, locate, and recover more information in less time across a multitude of platforms, storage environments, or hybrid-cloud architectures. Veritas offers an integrated, converged platform with highly scalable storage appliances while taking advantage of innovative solutions such as Information Map to further improve how your data can be managed and put to work for you.

# The Veritas Portfolio of Information Management Capabilities















## Target Audience

Sharing the right message with the right person is the key to increasing sales. This table will help you align your Veritas sales efforts with the right line of businesses, the right decision makers and any other influencers.

PERSONA TO SALES PLAY MATRIX



	Persona	Vision and Strategy	Information Protection	Information Governance	Information Availability
<b>Lines of Business</b>	CDO/CIO/CTO or equivalent 	✓		✓	
	Legal 			✓	
	Risk and Compliance Officer or GPO 			✓	✓
<b>Strategic IT/ Decision Makers</b>	CIO/IT Director 	✓	✓	✓	✓
	Head of Infrastructure 		✓	✓	✓
	CISO 				
	Head of IT Operations 		✓	✓	✓
	IT Engineering/Architecture 				✓
<b>Functional IT/ Influencers</b>	Backup Admin 		✓	✓	
	Database Admin 		✓		✓
	Storage Admin 		✓	✓	✓
	Virtualization Admin 		✓		✓





## Key Trends

The very existence of Veritas is a response to the changing information landscape and data challenges faced by today's businesses. Veritas solutions support customers in confronting these issues.

For each of these issues there are Veritas solutions and services that you can sell to help customers to achieve their objectives this year.

Data is growing at such a rate that infrastructure alone can no longer provide the answer. Businesses require innovative solutions to ensure that IT can enable rather than limit the business.

The EU General Data Protection Regulation (due in 2018) is an example of the increasing regulatory landscape. In the face of these impending changes to the law, now is the time to help customers ensure that their information is accessible and secure, wherever it resides.

The adoption of hybrid cloud solutions continues to grow. Along with the benefits these bring they also create increasingly complex IT environments and interdependent services, whilst fragmenting business data.

The popularity of integrated solutions continues as businesses embrace converged infrastructures that pull together multiple technologies into a single solution, reducing up-front costs and simplifying management.



## Unstructured Data Growth

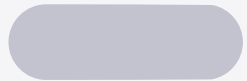
Research from IDC shows that unstructured content accounts for **90%** of all digital information<sup>2</sup>. It's also been shown that unstructured data is growing at twice the rate of structured content<sup>3</sup>. This creates a headache for businesses as unstructured data is the most difficult to manage and control, increasing the risk of insider threat. At this moment in time the growth rate is rapidly causing volumes of unstructured data to outstrip the budgets and resources available to manage them.

Organisations are commonly struggling to answer these simple questions about their data:

- Where is the data stored?
- Who owns the data?
- Who has access to the data?
- How is the data being used?

Unstructured data  
is growing at **2x**  
the rate of  
structured data

**90%**  
of digital information  
is unstructured



# Unstructured Data Growth

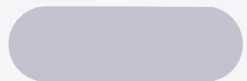
 **Veritas Solution:  
Information Governance**

With Veritas Information Governance Solutions, customers can answer these important questions about their data, enabling them to control and defensibly delete information that has no value to the business.

This greater visibility gives businesses the power to maximise the value of their data, while cutting data volumes, reducing both costs and risks. As a Veritas partner, you have the opportunity to deliver these benefits to your customers.

## Customer Outcomes

- Increased data visibility
- Lower overall data volumes
- Reduced storage costs



## Global Data Regulation

The EU General Data Protection Regulation (GDPR) is expected to come into force by 2018. It's a replacement for the 1995 Data Protection Act and for businesses it represents an important modernisation of EU data laws. It will harmonise the rules across member states and introduce more severe fines for any company from any nation who transact in the EU (these might be up to 5% of global turnover, up to a maximum of **€100,000,000**).

A fine of that size could easily eclipse the IT budget of an enterprise many times over.

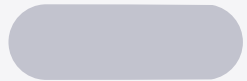
Veritas solutions enable better information governance through a three-step approach:

- 1.** Gain visibility - understand the nature of information held
- 2.** Take action - create sustainable policies and processes
- 3.** Assume control - automate to facilitate fast enquiry response

Fines may be 5% of  
global turnover up to

**€100,000,000**

**GDPR**  
becomes enforceable in 2018



## Global Data Regulation



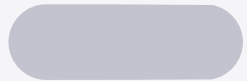
### Veritas Solution: Information Governance And Insight

With Veritas, businesses can begin a step-change journey that will ensure they will be GDPR compliant.

Along with compliance, customers can enhance their information management through a complete range of solutions covering data analysis and classification, retention management and archiving, and full EDRM eDiscovery.

### Customer Outcomes

- Greater data visibility
- Achieving compliance
- Reduced financial risk



## Hybrid Cloud Adoption

The world is moving to cloud, in fact, 38% of workloads today exist in a private cloud with 28% in public clouds. Those numbers are expected to grow at a rate of 7% and 18% respectively over the next 12 months.

According to a recent study on the State of the Hybrid Cloud, **23%** of Enterprises today are balancing data and application management complexities across four or more cloud infrastructure platforms in addition to their traditional data centers<sup>4</sup>. In this kind of IT environment, ensuring predictable resiliency for critical applications becomes more difficult and compliance to Service Level Objectives less than guaranteed. Along with the benefits, the move to cloud brings its own challenges:

- Fragmented implementations and low visibility
- Multi-vendor infrastructures that are difficult to manage
- Unpredictable uptime and recoverability with a high cost of failure
- Risk of overlooking application availability and data protection

**\$65.8bn**

estimated hybrid  
cloud market in 2020

**66%**

of workloads are  
based on public  
and private cloud

**74%**

of businesses use  
multiple cloud vendors



## Hybrid Cloud Adoption



### Veritas Solution: Information Availability

With Veritas Information Availability Solutions customers can enable predictable service level delivery and compliance across hybrid multi-vendor architectures. Veritas protects the data, application and infrastructure layers, accelerating the move to cloud by allowing customers to move with greater confidence.

Our Information Insight Solutions enable businesses to transform their growing data from a cost-centre into a business asset by discovering valuable insights. Veritas is ready to help your customers embrace the agility of hybrid cloud architectures while avoiding the risks.

### Customer Outcomes

- Reliable SLA compliance
- Faster move of legacy applications to hybrid cloud
- Protection of data to, in and from the cloud



## 360° Converged Infrastructure

Converged Infrastructure offers resource-limited organisations agility and scalability at a lower up-front cost, along with fast deployment, simplified maintenance and opportunities for automation. Due to these wide ranging benefits, the integrated systems market will grow at a CAGR of 14.8% from 2015 through 2020 to reach nearly \$18.7 billion by the end of 2020. However, hyperconverged integrated systems will be the fastest-growing segment, growing at a CAGR of 60.5% during that forecast period<sup>5</sup>.

These are the convergence challenges that you can help customers to overcome:

- Trading simplicity for new silos and lower visibility
- Patchwork converged fixes could lead to fragmentation
- Changing the data protection architecture puts the business at risk
- Convergence can lead to unplanned restructuring of the backup environment

**\$6bn**

market opportunity

**30%**

market growth  
forecast for 2015

**40%**

By 2018  
of mid-size enterprises will  
change servers and storage  
to integrated systems





## Converged Infrastructure



### Veritas Solution: 360 Data Management

Used together, our solutions provide value much greater than the sum of their individual parts. Your customers will gain complete control of their data thanks to a seamless perspective not available anywhere else. What's more, you can build the foundation for 360 Data Management on your customer's existing NetBackup investment.

#### Global Data Visibility

Information Map + NetBackup

#### Predictable, Integrated Resiliency

Veritas Resiliency Platform + NetBackup

#### Integrated Copy Data Management

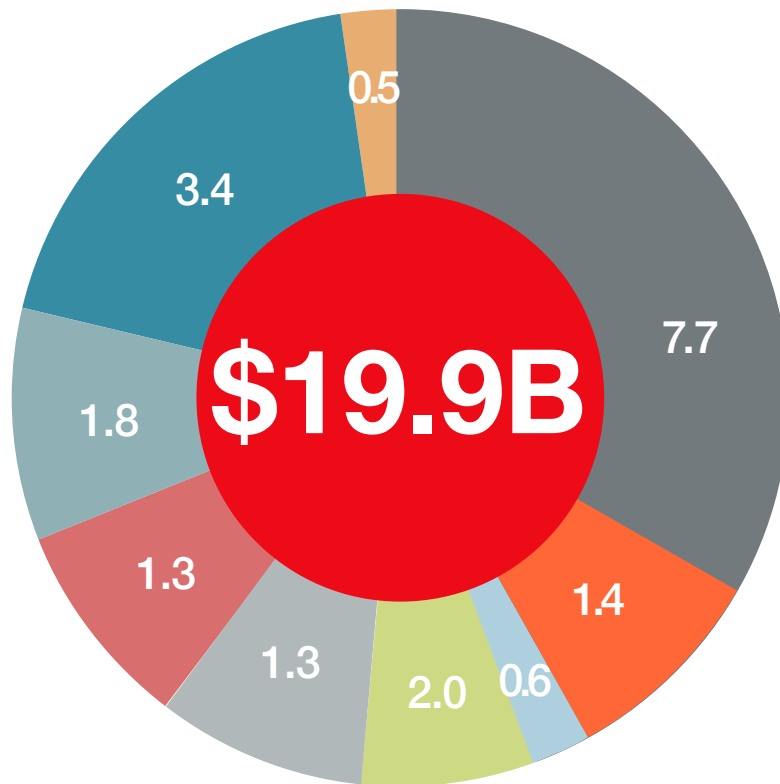
Velocity + NetBackup

### Customer Outcomes

- Quickly see & manage all their data from a single, unified viewpoint.
- Gain actionable intelligence to shape decisions or IT service to foster agility.
- Create durable service that goes beyond backup and disaster recovery.
- Proactively meet uptime or capacity demands across your entire IT landscape.
- Gain rapid, on-demand self-service access to data.
- Eliminate copy data sprawl, manage data more efficiently and reduce risk.

# What's At Stake? Accessible Market Opportunity

2020 Veritas Accessible Markets\*



- Backup Software
- eDiscovery Software
- Archiving (On-Premise and SaaS)
- Core Storage Management
- Availability and Clustering
- Backup Appliances
- File Analysis
- Disaster Recovery as a Service
- Software Defined Storage Software

\*Veritas Accessible Market is calculated on the basis of IDC and Gartner analyst data and normalized by Veritas Market and Customer Insights against Veritas revenue actuals and market presence. For Veritas partners, this forecasts accessible market opportunity, based on focused and targeted demand generation efforts with Veritas.



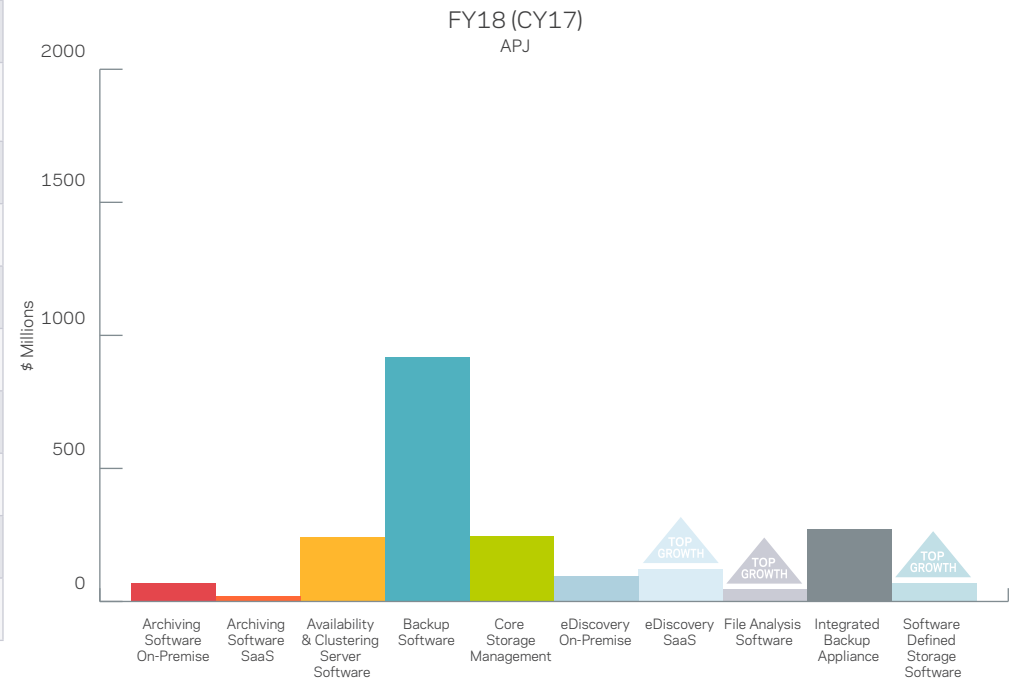
# APJ - FY18 Top Growth Countries

Hover over the pins to show  
information

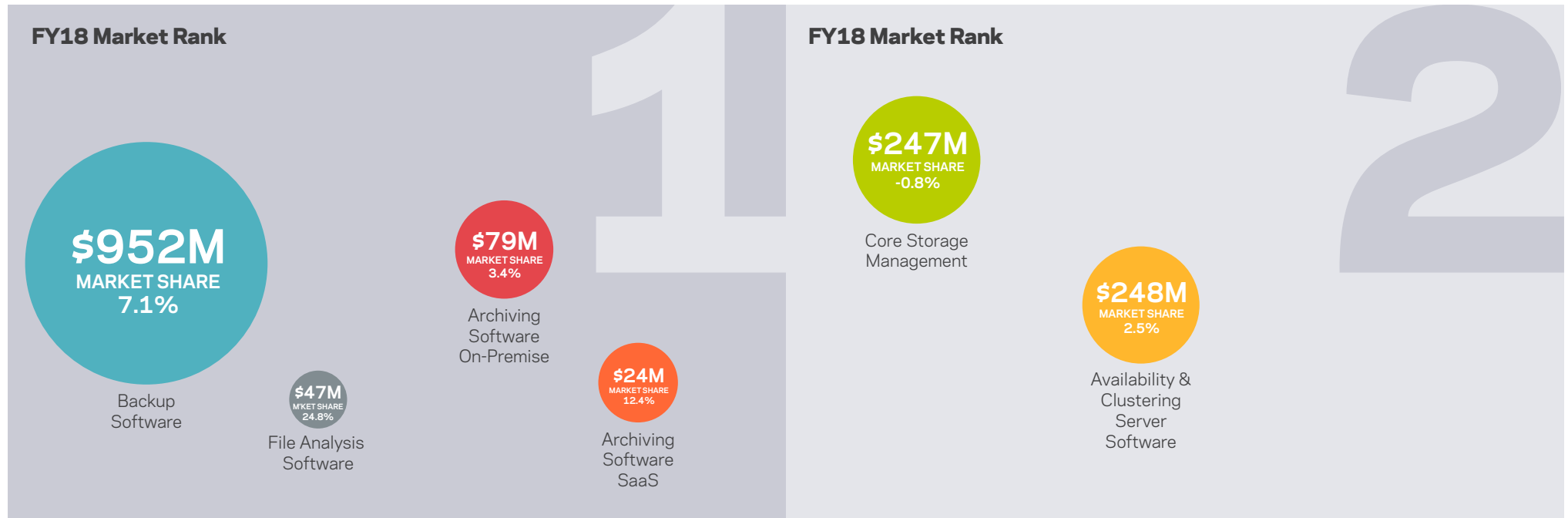


# APJ – FY18 Market Opportunity

Product Market	FY17 (CY16) VAM	FY18 (CY17) VAM	FY17-18 (CY16-17) Growth	Market Rank
■ Archiving Software On-Premise	\$66 M	\$79 M	3.4%	1
■ Archiving Software SaaS	\$30 M	\$24 M	12.4%	1
■ Availability and Clustering Server Software	\$257 M	\$248 M	2.5%	2
■ Backup Software	\$902 M	\$952 M	7.1%	1
■ Core Storage Management	\$253 M	\$247 M	-0.8%	2
■ eDiscovery On-Premise	\$197 M	\$95 M	2.8%	6
■ eDiscovery SaaS		\$122 M	31%	-
■ File Analysis Software	-	\$47 M	24.8%	1
■ Integrated Backup Appliance	\$283 M	\$281 M	11.8%	-
■ Software Defined Storage Software	-	\$82 M	18%	-
Totals	\$2,185 M	\$2,177	7.9%	-

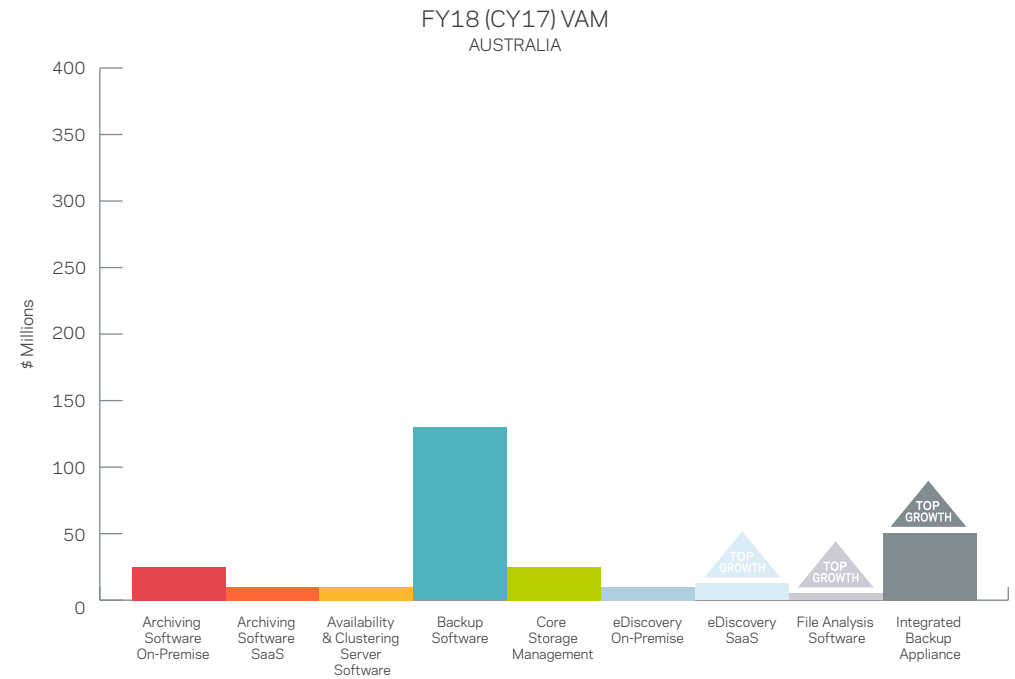


# APJ – FY18 Opportunity Overview



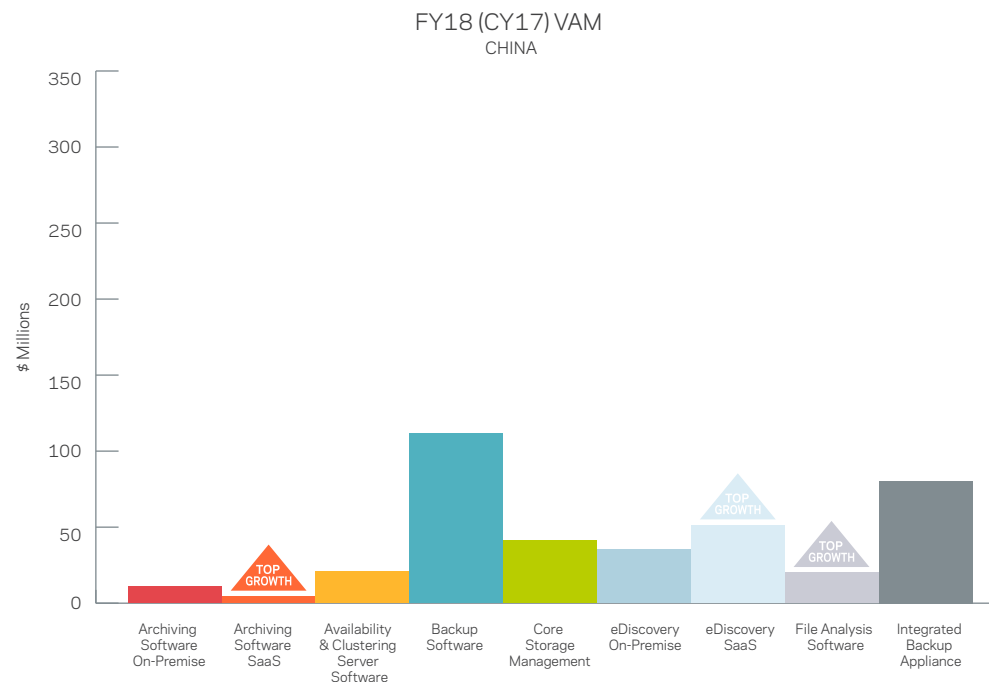
# Australia – FY18 Market Opportunity

Product Market	FY17 (CY16) VAM	FY18 (CY17) VAM	FY17-18 (CY16-17) Growth	Market Rank
■ Archiving Software On-Premise	\$26 M	\$26 M	0.4%	1
■ Archiving Software SaaS	\$12 M	\$9 M	11.7%	1
■ Availability and Clustering Software	\$13 M	\$10 M	3.6%	2
■ Backup Software	\$149 M	\$131 M	9.1%	1
■ Core Storage Management	\$30 M	\$28 M	0.6%	3
■ eDiscovery On-Premise	-	\$12 M	3.5%	5
■ eDiscovery SaaS	-	\$16 M	20%	-
■ File Analysis Software	-	\$4 M	20.3%	1
■ Integrated Backup Appliance	\$55 M	\$55 M	12%	-



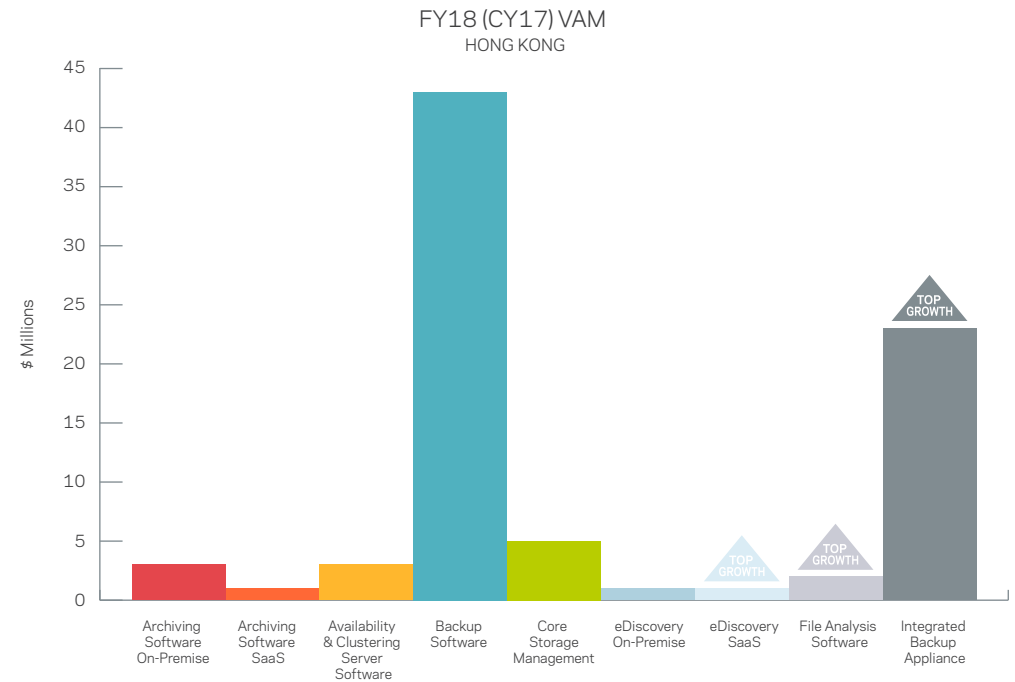
# China – FY18 Market Opportunity

Product Market	FY17 (CY16) VAM	FY18 (CY17) VAM	FY17-18 (CY16-17) Growth	Market Rank
■ Archiving Software On-Premise	\$8 M	\$12 M	7.0%	2
■ Archiving Software SaaS	\$3 M	\$3 M	23.6%	8
■ Availability and Clustering Software	\$24 M	\$23 M	-1.8%	1
■ Backup Software	\$112 M	\$110 M	3.9%	1
■ Core Storage Management	\$27 M	\$41 M	1.5%	2
■ eDiscovery On-Premise	-	\$35 M	5.7%	8
■ eDiscovery SaaS	-	\$52 M	43.2%	-
■ File Analysis Software	-	\$10 M	31.5%	1
■ Integrated Backup Appliance	\$95 M	\$81 M	11.5%	-



# Hong Kong – FY18 Market Opportunity

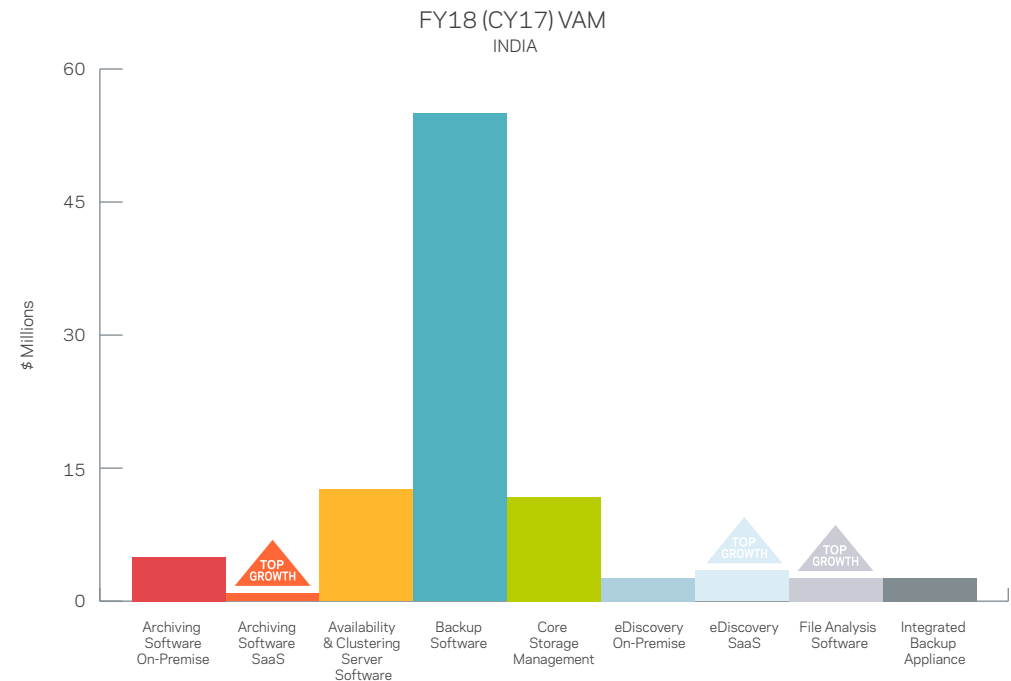
Product Market	FY17 (CY16) VAM	FY18 (CY17) VAM	FY17-18 (CY16-17) Growth	Market Rank
■ Archiving Software On-Premise	\$2 M	\$3 M	6.9%	1
■ Archiving Software SaaS	\$1 M	\$1 M	9.1%	1
■ Availability and Clustering Software	\$3 M	\$3 M	2.4%	1
■ Backup Software	\$45 M	\$43 M	10.4%	2
■ Core Storage Management	\$6 M	\$5 M	4.5%	2
■ eDiscovery On-Premise	-	\$1 M	2.2%	2
■ eDiscovery SaaS	-	\$1 M	16.1%	-
■ File Analysis Software	-	\$2 M	29.7%	1
■ Integrated Backup Appliance	\$19 M	\$23 M	11.8%	-





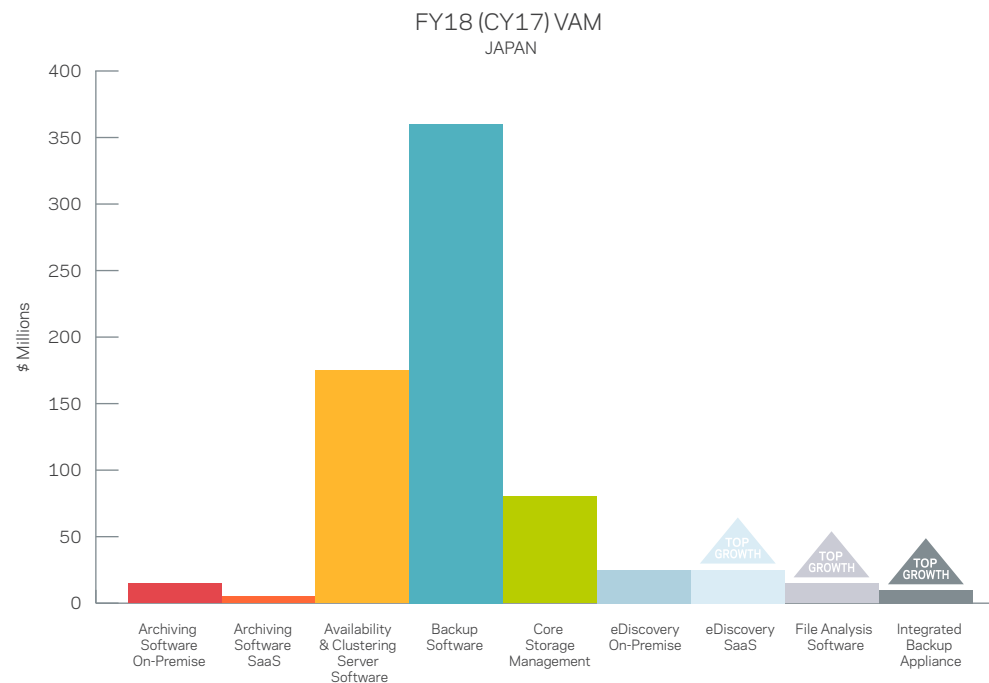
# India – FY18 Market Opportunity

Product Market	FY17 (CY16) VAM	FY18 (CY17) VAM	FY17-18 (CY16-17) Growth	Market Rank
■ Archiving Software On-Premise	\$4 M	\$5 M	5.1%	3
■ Archiving Software SaaS	\$1 M	\$1 M	16.1%	1
■ Availability and Clustering Software	\$11 M	\$13 M	6.5%	2
■ Backup Software	\$36 M	\$55 M	12.1%	2
■ Core Storage Management	\$8 M	\$12 M	10.6%	1
■ eDiscovery On-Premise	-	\$3 M	1.8%	10
■ eDiscovery SaaS	-	\$4 M	25.6%	-
■ File Analysis Software	-	\$3 M	32.7%	1
■ Integrated Backup Appliance	\$9 M	\$3 M	11.9%	-



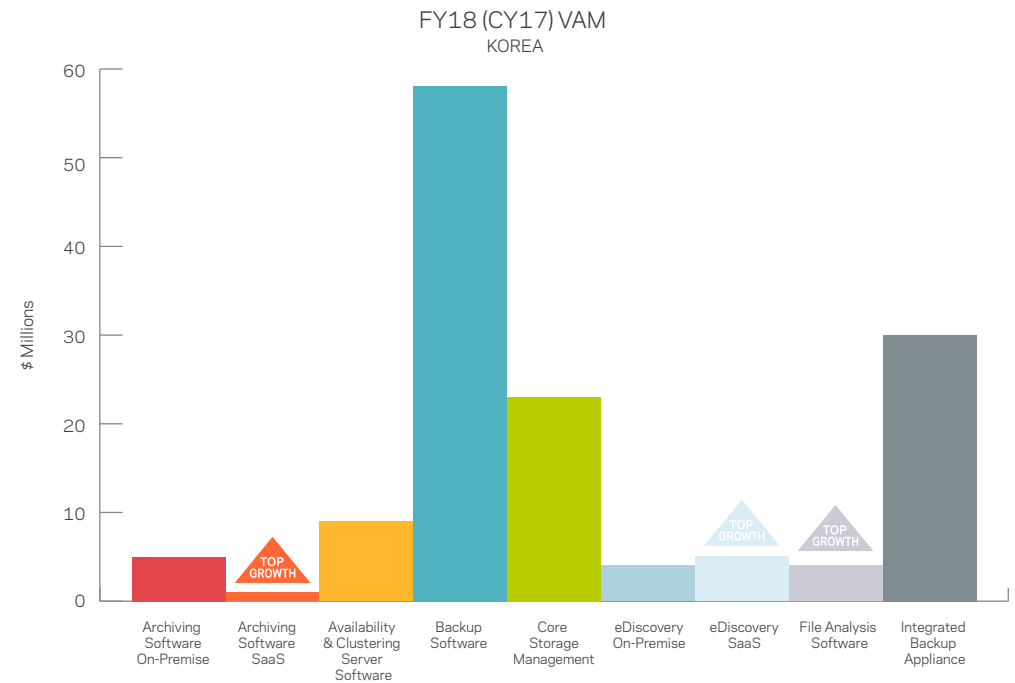
# Japan – FY18 Market Opportunity

Product Market	FY17 (CY16) VAM	FY18 (CY17) VAM	FY17-18 (CY16-17) Growth	Market Rank
■ Archiving Software On-Premise	\$9 M	\$15 M	2.7%	2
■ Archiving Software SaaS	\$6 M	\$4 M	0.0%	1
■ Availability and Clustering Software	\$181 M	\$175 M	3.0%	8
■ Backup Software	\$328 M	\$362 M	4.4%	1
■ Core Storage Management	\$111 M	\$88 M	-7.1%	2
■ eDiscovery On-Premise	-	\$26 M	-3.7%	9
■ eDiscovery SaaS	-	\$25 M	19.0%	-
■ File Analysis Software	-	\$17 M	20.7%	1
■ Integrated Backup Appliance	\$4 M	\$11 M	11.7%	-



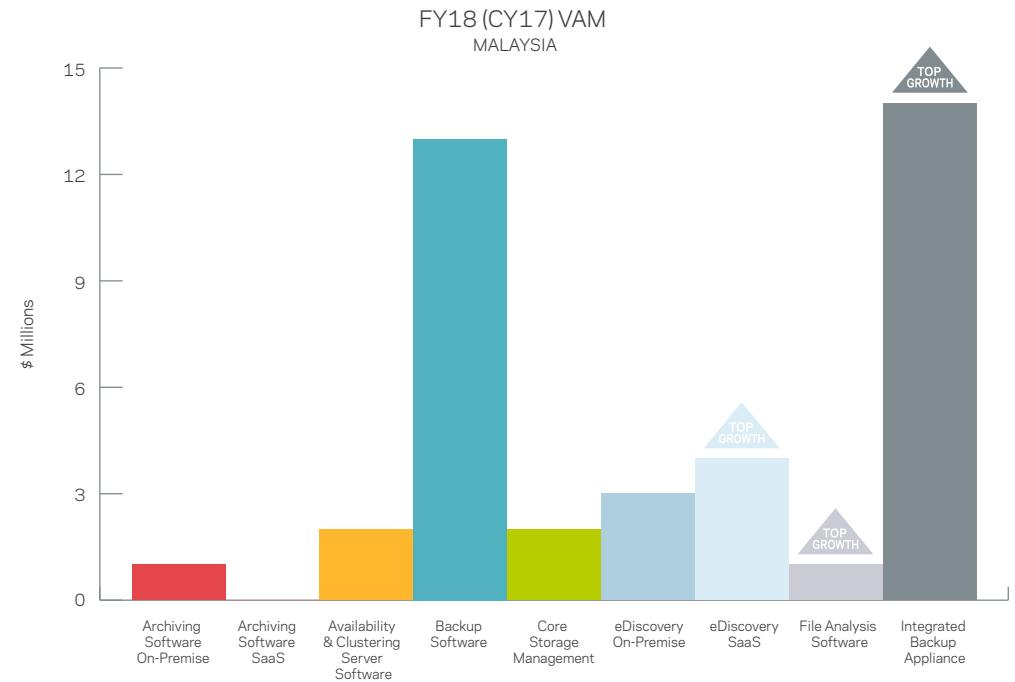
## Korea – FY18 Market Opportunity

Product Market	FY17 (CY16) VAM	FY18 (CY17) VAM	FY17-18 (CY16-17) Growth	Market Rank
■ Archiving Software On-Premise	\$4 M	\$5 M	2.1%	2
■ Archiving Software SaaS	\$2 M	\$1 M	15.9%	-
■ Availability and Clustering Software	\$11 M	\$9 M	4.6%	1
■ Backup Software	\$61 M	\$58 M	7.3%	2
■ Core Storage Management	\$22 M	\$23 M	1.8%	3
■ eDiscovery On-Premise	-	\$4 M	5.0%	10
■ eDiscovery SaaS	-	\$5 M	22.1%	-
■ File Analysis Software	-	\$4 M	20.5%	1
■ Integrated Backup Appliance	\$31 M	\$30 M	11.6%	-



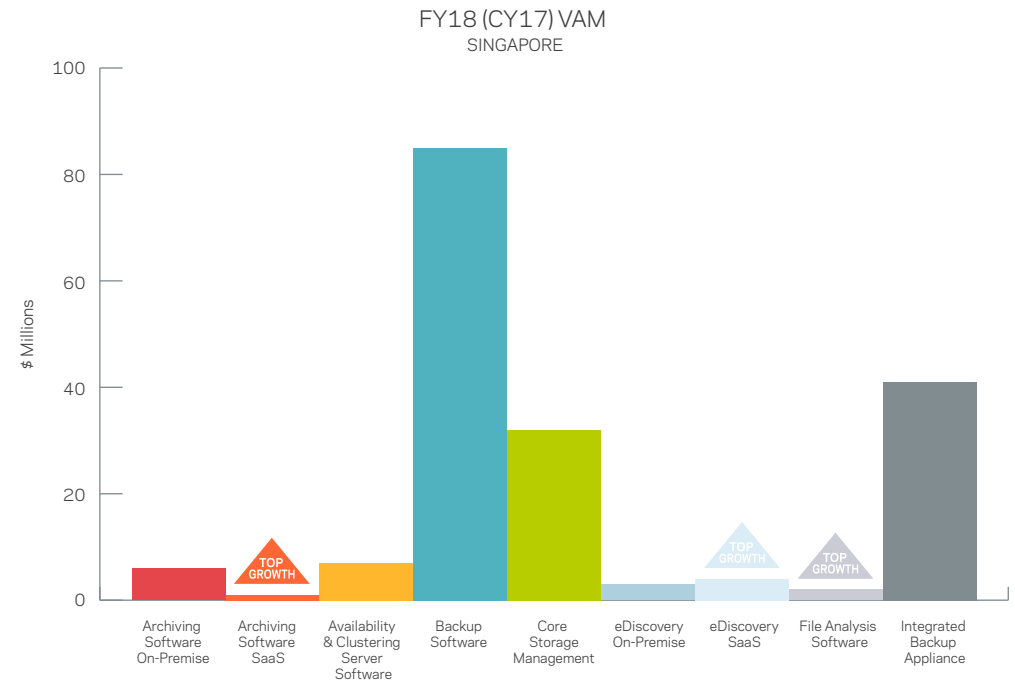
# Malaysia – FY18 Market Opportunity

Product Market	FY17 (CY16) VAM	FY18 (CY17) VAM	FY17-18 (CY16-17) Growth	Market Rank
■ Archiving Software On-Premise	\$1 M	\$1 M	5.2%	1
■ Archiving Software SaaS	\$1 M	\$0 M	2.1%	3
■ Availability and Clustering Software	\$1 M	\$2 M	2.4%	1
■ Backup Software	\$19 M	\$13 M	5.1%	1
■ Core Storage Management	\$4 M	\$2 M	0.2%	2
■ eDiscovery On-Premise	-	\$3 M	6.9%	10
■ eDiscovery SaaS	-	\$4 M	18.1%	-
■ File Analysis Software	-	\$1 M	31.4%	1
■ Integrated Backup Appliance	\$18 M	\$14 M	12.2%	-



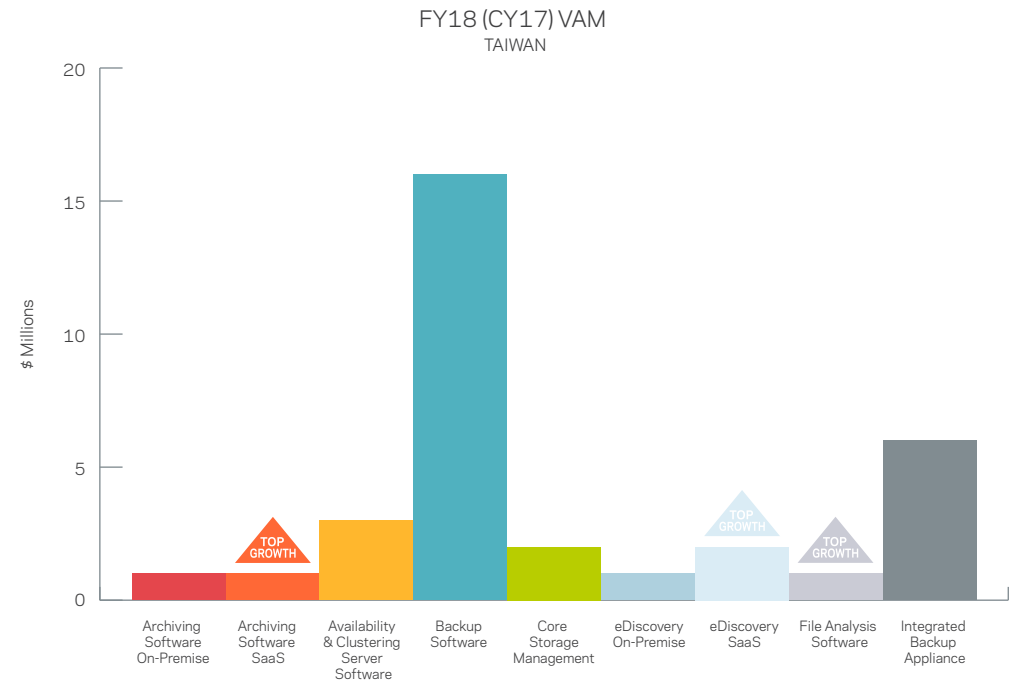
# Singapore – FY18 Market Opportunity

Product Market	FY17 (CY16) VAM	FY18 (CY17) VAM	FY17-18 (CY16-17) Growth	Market Rank
■ Archiving Software On-Premise	\$5 M	\$6 M	8.5%	2
■ Archiving Software SaaS	\$1 M	\$1 M	16.3%	1
■ Availability and Clustering Software	\$5 M	\$7 M	-1.3%	1
■ Backup Software	\$66 M	\$85 M	9.6%	1
■ Core Storage Management	\$20 M	\$32 M	5.5%	1
■ eDiscovery On-Premise	-	\$3 M	7.6%	1
■ eDiscovery SaaS	-	\$4 M	40.3%	-
■ File Analysis Software	-	\$2 M	23.5%	1
■ Integrated Backup Appliance	\$26 M	\$41 M	12.0%	-



# Taiwan – FY18 Market Opportunity

Product Market	FY17 (CY16) VAM	FY18 (CY17) VAM	FY17-18 (CY16-17) Growth	Market Rank
Archiving Software On-Premise	\$1 M	\$1 M	6.7%	4
Archiving Software SaaS	\$0 M	\$1 M	17.6%	6
Availability and Clustering Software	\$3 M	\$3 M	-0.4%	2
Backup Software	\$17 M	\$16 M	2.6%	1
Core Storage Management	\$2 M	\$2 M	-0.5%	1
eDiscovery On-Premise	-	\$1 M	2.5%	9
eDiscovery SaaS	-	\$2 M	42.1%	-
File Analysis Software	-	\$1 M	28.3%	1
Integrated Backup Appliance	\$6 M	\$6 M	11.8%	-



## References

<sup>1</sup> IDC, Digital Universe Study 2014

<sup>2</sup> IDC, Unlocking the Hidden Value of Information, July 2014 -

[https://idc-community.com/?signin&r=%2fgroups%2fit\\_agenda%2fbusiness-analytics-big-data%2funlocking\\_the\\_hidden\\_value\\_of\\_information](https://idc-community.com/?signin&r=%2fgroups%2fit_agenda%2fbusiness-analytics-big-data%2funlocking_the_hidden_value_of_information)

<sup>3</sup> Global Graphics, Knowledge Management -

<http://www.globalgraphics.com/technology/knowledge-management/>

<sup>4</sup> State of Hybrid Cloud -

<https://www.veritas.com/content/dam/Veritas/docs/reports/veritas-state-of-the-hybrid-cloud-report-2016.pdf>

<sup>5</sup> Gartner Forecast Analysis: Integrated Systems, Worldwide, 1Q16 Update. Analysts: Aman Munglani & Adrian O'Connell

\* Market Data: Data is derived from IDC Reports, prepared by Veritas

## Glossary

<b>CAGR:</b>	Compound Annual Growth Rate
<b>CDO:</b>	Chief Data Officer
<b>CI:</b>	Converged Infrastructure
<b>CIO:</b>	Chief Information Officer
<b>CISO:</b>	Chief Information Security Officer
<b>CTO:</b>	Chief Technology Officer
<b>EDRM:</b>	Electronic Document and Records Management
<b>FY:</b>	Financial Year
<b>GDPR:</b>	General Data Protection Regulations
<b>SaaS:</b>	Software-as-a-Service
<b>VAM:</b>	Veritas Addressable Market (Serviceable Addressable Market)





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