Veritas Market Opportunity Guide

AMERICAS FY16 / FY17 PLANNING

CONTENTS

VERITAS™

WHY VERITAS?

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

Around the world the regulation of data privacy is increasing, including EU and US laws that will apply globally to anyone working with data from those regions.

Veritas is joining forces with partners to support organizations as they take on the challenge.

This guide details the most significant information challenges that your customers will face in the year ahead. The following pages will help you to identify opportunities to help your customers overcome these challenges and increase your revenues in partnership with Veritas.

The Veritas Mission

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

VERITAS

OUR APPROACH

Working with **86%** of the Fortune 500 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. DATA ≠ INFORMATION

Information is data with meaning, yet much of the data businesses hoard contains no meaning, simply a product of business processes.

2. MORE DATA ≠ MORE VALUE

69% of the data held by organizations contains no business or regulatory value, meaning that only **31%** is valuable, which businesses can only extract if they can identify the right 31%[2].

3. INFORMATION > INFRASTRUCTURE

Hardware infrastructure is only one part of an effective information strategy, yet for decades businesses have been investing in more storage hardware to patch and delay the data issue.

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 two 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 INSIGHT SOLUTIONS

Much of the data held by organizations holds no business value, but a portion of it does, and many companies are unable to discover that value. Veritas information insight 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.

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	Backup and Recovery	Information Governance	Information Agility and Resiliency
Lines of Business	CDO/CIO/CTO or equivalent	✓		✓	
	Legal			✓	
	Risk and Compliance Officer or GPO			✓	✓
Strategic IT/ Decision Makers	CIO/IT Director	✓	✓	✓	✓
	Head of Infrastructure		✓	✓	✓
	CISO				
	Head of IT Operations		✓	✓	✓
	IT Engineering/Architecture				✓
Functional IT/ Influencers	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.

LEARN MORE IN THE VERITAS STRATEGY & SOLUTIONS MATRIX

UNSTRUCTURED DATA GROWTH

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.

HYBRID CLOUD ADOPTION

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.

CONVERGED INFRASTRUCTURE

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[3]. It's also been shown that unstructured data is growing at twice the rate of structured content[4]. 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.

Organizations 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

VERITAS

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 maximize 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 visibility
- Lower overall data volumes
- Reduced storage costs

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HYBRID CLOUD ADOPTION

We've seen that the highest rate of cloud adoption is in hybrid cloud. In fact, research has shown that **90%** of enterprises are going to pursue a hybrid cloud solution this year. As part of that, **52%** say that they plan to increase their spend on cloud computing in 2015[5]. 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

$65.8B
estimated hybrid cloud market in 2020

50%
market growth forecast for 2015

90%
of businesses will pursue a hybrid cloud solution in the year ahead

VERITAS

HYBRID CLOUD ADOPTION

VERITAS SOLUTION: INFORMATION AVAILABILITY & INSIGHT

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-center into a business asset by discovering valuable insights.

CUSTOMER OUTCOMES

- Reliable SLA compliance
- Faster move to hybrid cloud

CONVERGED INFRASTRUCTURE

Converged Infrastructure offers resource limited organizations 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 estimated revenue from CI in 2014 was **$6 billion**[6] and a growth of 30% is forecast in 2015[6].

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

$6B
market opportunity

30%
market growth forecast for 2015

By 2018 **40%**
of mid-size enterprises will change servers and storage to integrated systems

CONVERGED INFRASTRUCTURE

VERITAS SOLUTION: CONVERGED BACKUP

Veritas provides visibility and efficient management across infrastructure silos, in a converged infrastructure that's dedicated to data protection, whilst also simple and quick to install. This solution addresses the growing complexity and scale of today's data protection environments and drives out the high cost of management. With Veritas, you can help customers to achieve smooth IT modernization (e.g. virtualization, hybrid cloud and converged infrastructure) and deliver cloud-like service levels with on-premise benefits.

CUSTOMER OUTCOMES

- OpEx and CapEx savings
- Insight into Backup and Recovery across the enterprise
- Increased IT agility
- More time for strategic improvements
- Future-proof Backup and Recovery

VERITAS™

STRATEGY & SOLUTION MATRIX

MISSION: Our mission is to enable organisations to harness the power of their information, wherever it resides by delivering solutions that drive availability and reveal insights.

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AMERICAS – FY17 TOP GROWTH COUNTRIES

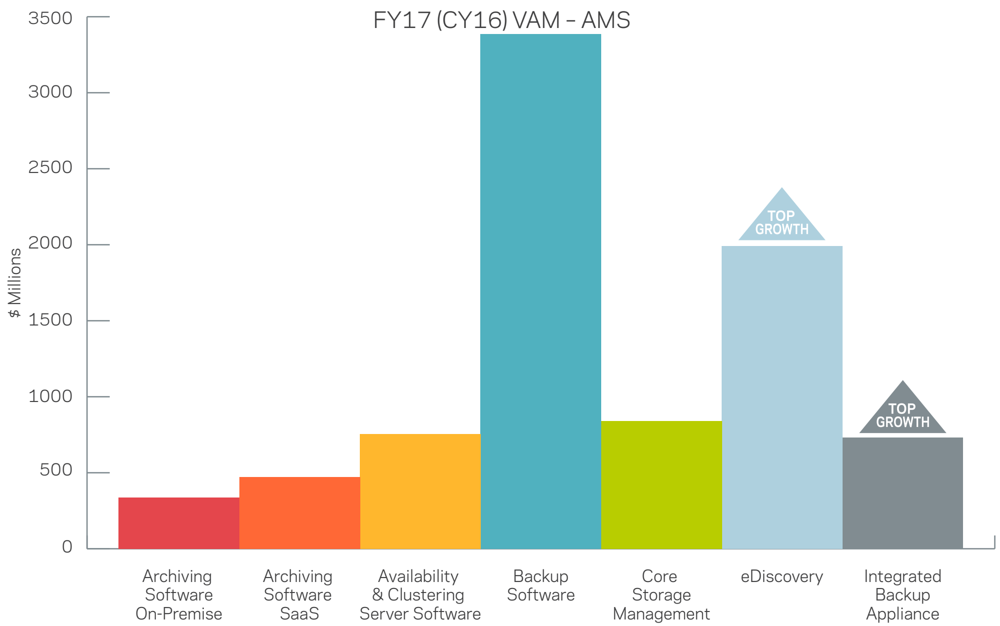
Hover over the pins
to show information

FY17: April 16 to Mar 17

VERITAS™

AMS - FY17 MARKET OPPORTUNITY

Product Market	FY17 (CY16) VAM	FY16 (CY15) VAM	FY16-17 (CY15-16) Market Growth	Veritas CY14 Market Rank
Archiving Software On-Premise	$338 M	$331 M	2.1%	1
Archiving Software SaaS	$473 M	$444 M	6.6%	3
Availability and Clustering Server Software	$756 M	$740 M	2.1%	3
Backup Software ^	$3,385 M	$3,126 M	8.3%	1
Core Storage Management	$839 M	$869 M	-3.4%	2
eDiscovery	$1,993 M	$1,805 M	10.4%	4
Integrated Backup Appliance	$731 M	$643 M	13.8%	-
Totals	$8,515 M	$7,957 M	7.0%	-



^ Includes both NetBackup and Backup Exec.

FY17: April 16 to Mar 17

AMS - FY17 OPPORTUNITY OVERVIEW

Market Rank 1

$3,385M
MARKET SHARE
24.6%
Backup Software

$338M
MARKET SHARE
21.4%
Archiving Software On-Premise

Market Rank 2

$839M
MARKET SHARE
21.7%
Core Storage Management

Market Rank 3

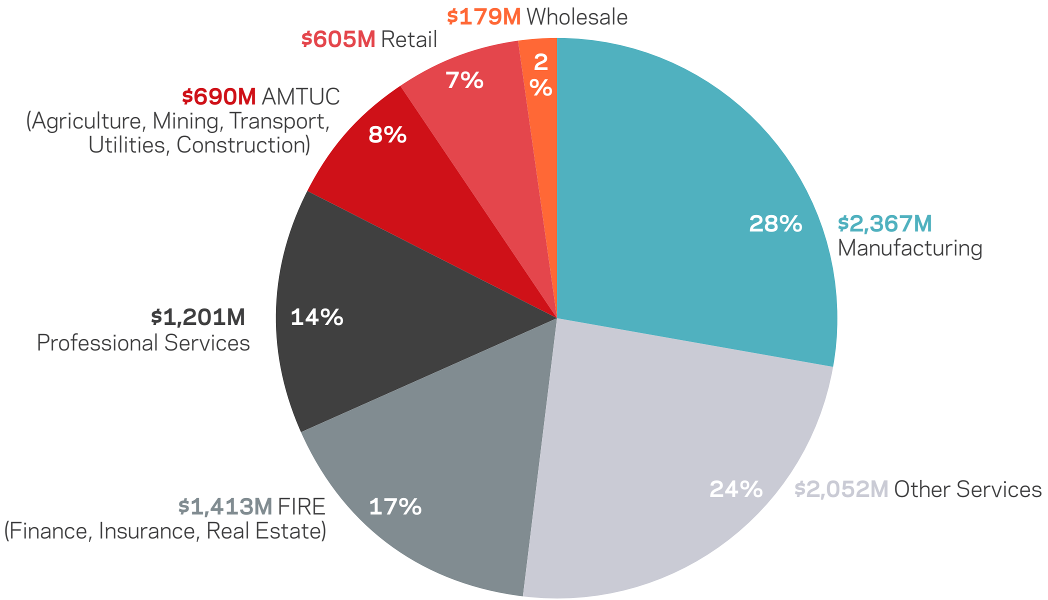
$756M
MARKET SHARE
14.7%
Availability and Clustering Server Software

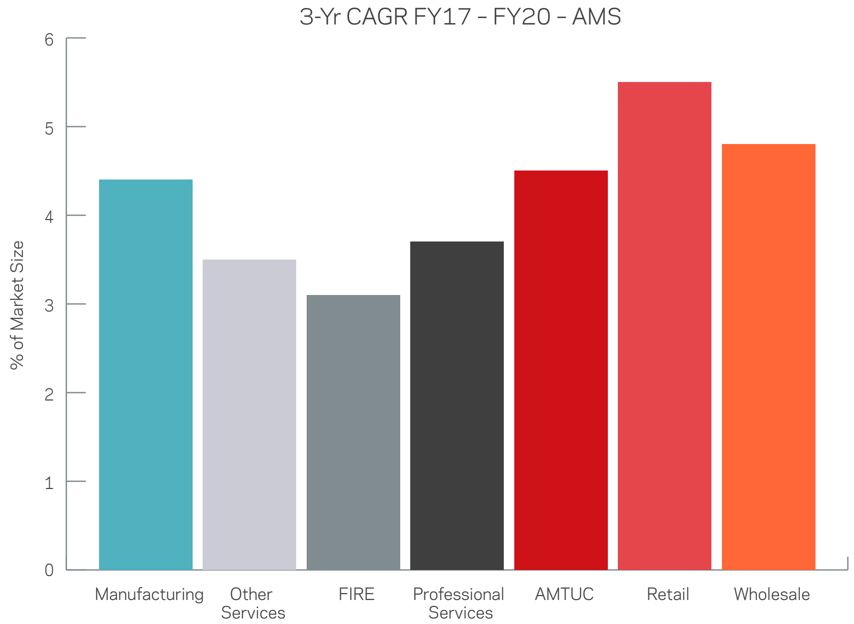
$473M
MARKET SHARE
10.6%
Archiving Software SaaS

FY17: April 16 to Mar 17

VERITAS

AMS - FY17 MARKET SIZE BY VERTICAL

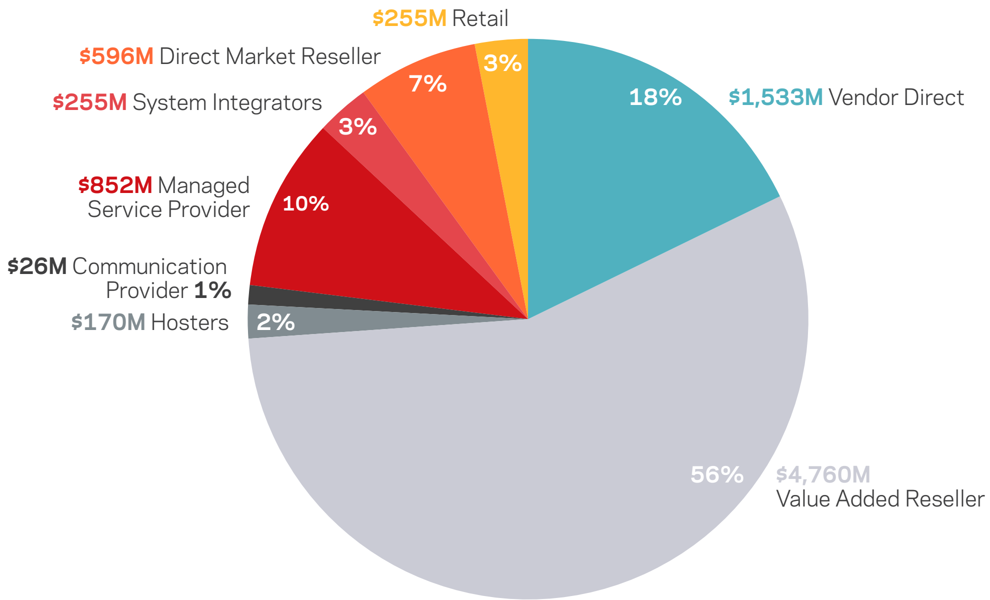


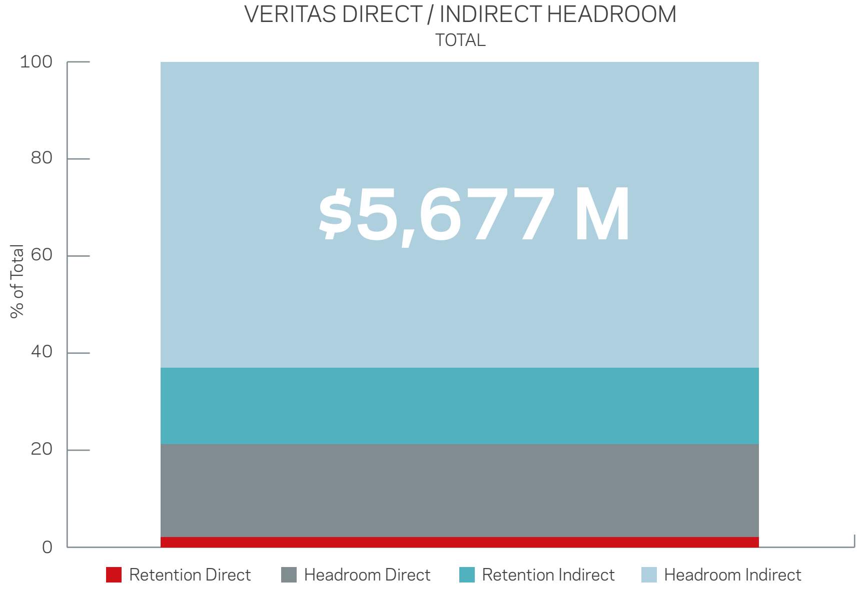


Source: AMI Q1-2015 SMB Verticals (31.03.15), AMI Q1-2015 LB Verticals (31.03.15)

FY17: April 16 to Mar 17

AMS - FY17 PARTNER MARKET SIZE





Sources: Market & Customer Insights. Symantec Business Intelligence / Finance, Planning and Analysis / Proprietary market analysis based on IDC and Gartner ICT global spending research. AMI Q1-2015 SMB Routes-to-Market (31.03.15). AMI Q1-2015 LB Routes-to-Market (31.03.15)

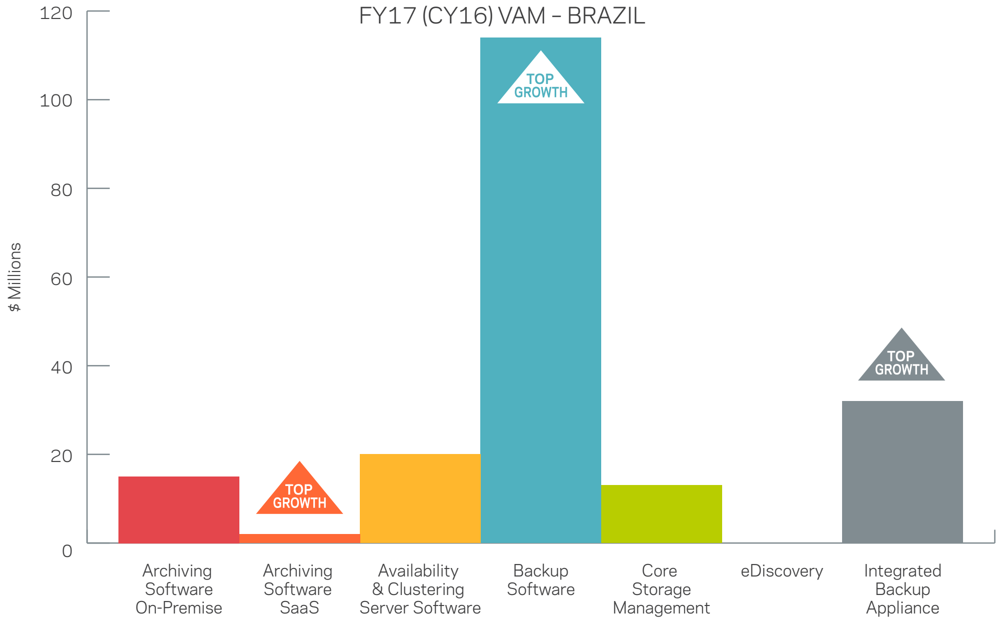
FY17: April 16 to Mar 17

BRAZIL - FY17 MARKET OPPORTUNITY

Product Market	FY17 (CY16) VAM	FY16 (CY15) VAM	FY16-17 (CY15-16) Market Growth	Veritas CY14 Market Rank
Archiving Software On-Premise	$15 M	$14 M	7.7%	2
Archiving Software SaaS	$2 M	$2 M	46.0%	1
Availability and Clustering Server Software	$20 M	$18 M	7.8%	4
Backup Software^	$114 M	$101 M	13.5%	1
Core Storage Management	$13 M	$12 M	5.7%	2
eDiscovery^^	-	-	-	-
Integrated Backup Appliance	$32 M	$29 M	12.3%	-
Totals	$285 M	$176 M	12.0%	-

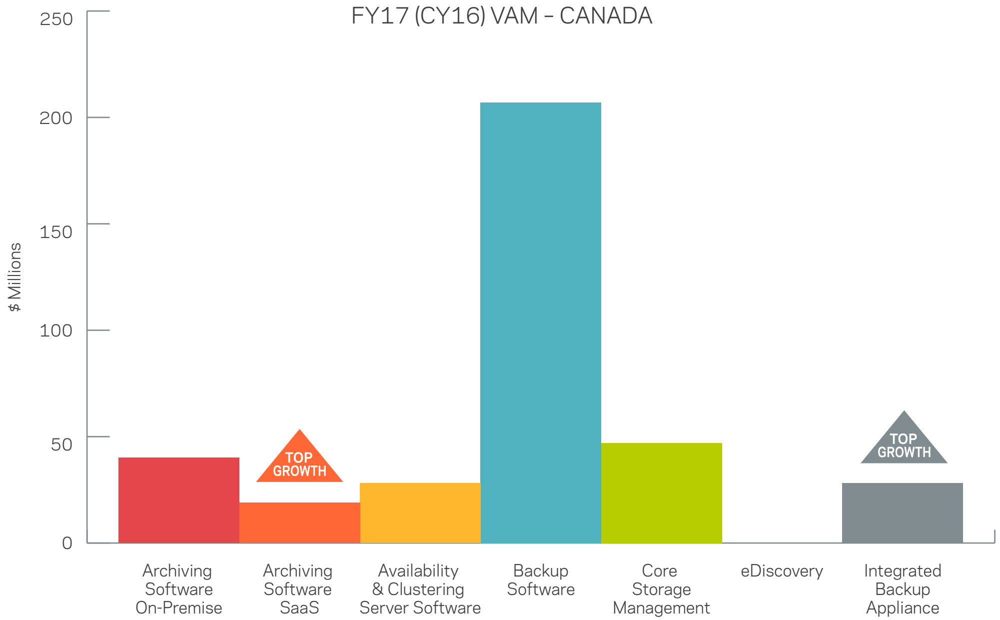
^Includes both NetBackup and Backup Exec.
^^ Country breakdown not available for eDiscovery.

FY17: April 16 to Mar 17



CANADA - FY17 MARKET OPPORTUNITY

Product Market	FY17 (CY16) VAM	FY16 (CY15) VAM	FY16-17 (CY15-16) Market Growth	Veritas CY14 Market Rank
Archiving Software On-Premise	$40 M	$39 M	0.5%	3
Archiving Software SaaS	$19 M	$16 M	14.5%	4
Availability and Clustering Server Software	$28 M	$26 M	7.5%	3
Backup Software^	$207 M	$193 M	7.7%	1
Core Storage Management	$47 M	$46 M	2.0%	2
eDiscovery^^	-	-	-	-
Integrated Backup Appliance	$28 M	$25 M	12.0%	-
Totals	$369 M	$265 M	4.9%	-



^Includes both NetBackup and Backup Exec.
^^ Country breakdown not available for eDiscovery.

FY17: April 16 to Mar 17

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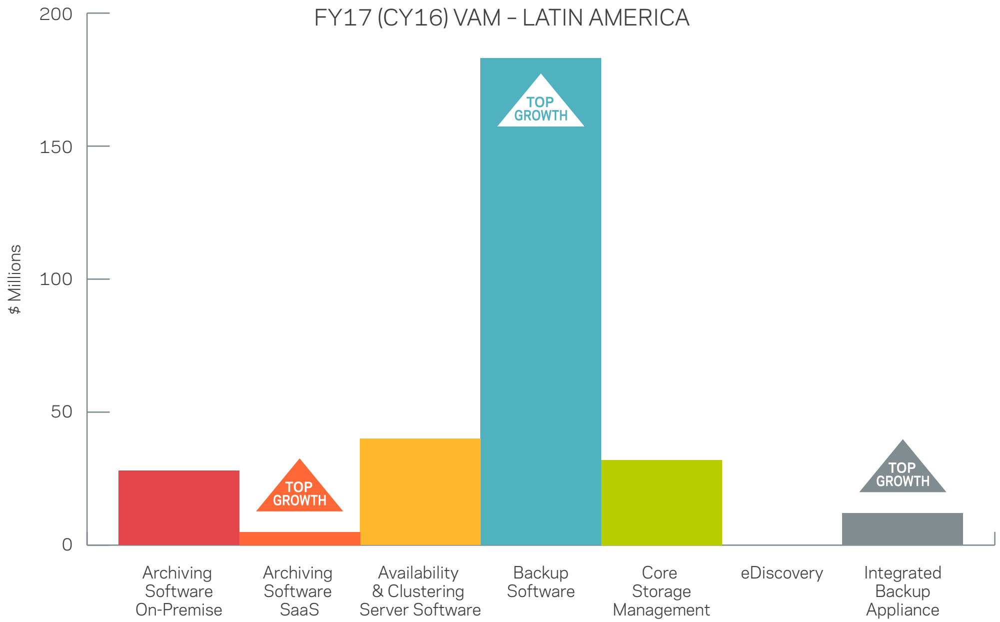
LATIN AMERICA† - FY17 MARKET OPPORTUNITY

Product Market	FY17 (CY16) VAM	FY16 (CY15) VAM	FY16-17 (CY15-16) Market Growth	Veritas CY14 Market Rank
Archiving Software On-Premise	$28 M	$26 M	10.6%	2
Archiving Software SaaS	$5 M	$3 M	40.9%	1
Availability and Clustering Server Software	$40 M	$37 M	6.8%	4
Backup Software^	$183 M	$161 M	13.4%	1
Core Storage Management	$32 M	$31 M	1.3%	2
eDiscovery^^	-	-	-	-
Integrated Backup Appliance	$47 M	$42 M	12.1%	-
Totals	$335 M	$301 M	11.2%	-



† Excludes Brazil and Mexico
^Includes both NetBackup and Backup Exec.
^^ Country breakdown not available for eDiscovery.

FY17: April 16 to Mar 17

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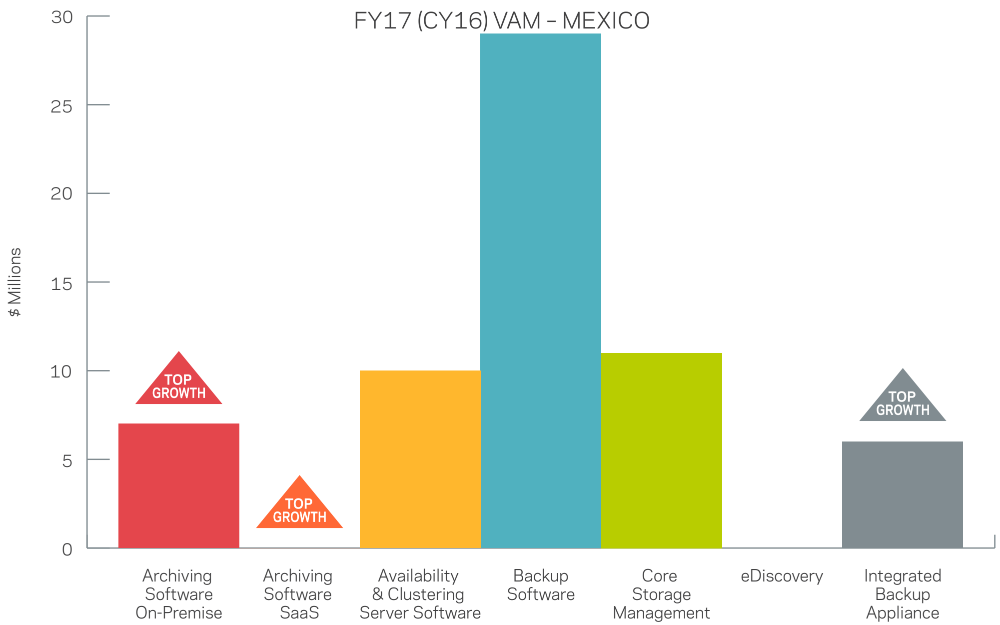
MEXICO - FY17 MARKET OPPORTUNITY

Product Market	FY17 (CY16) VAM	FY16 (CY15) VAM	FY16-17 (CY15-16) Market Growth	Veritas CY14 Market Rank
Archiving Software On-Premise	$7 M	$6 M	14.2%	3
Archiving Software SaaS	$0.44 M	$0.32 M	37.3%	0
Availability and Clustering Server Software	$10 M	$9 M	6.2%	2
Backup Software^	$29 M	$26 M	10.5%	1
Core Storage Management	$11 M	$11 M	0.7%	1
eDiscovery^^	-	-	-	-
Integrated Backup Appliance	$6 M	$5 M	11.8%	-
Totals	$62 M	$57 M	8.6%	-

^Includes both NetBackup and Backup Exec.
^^ Country breakdown not available for eDiscovery.



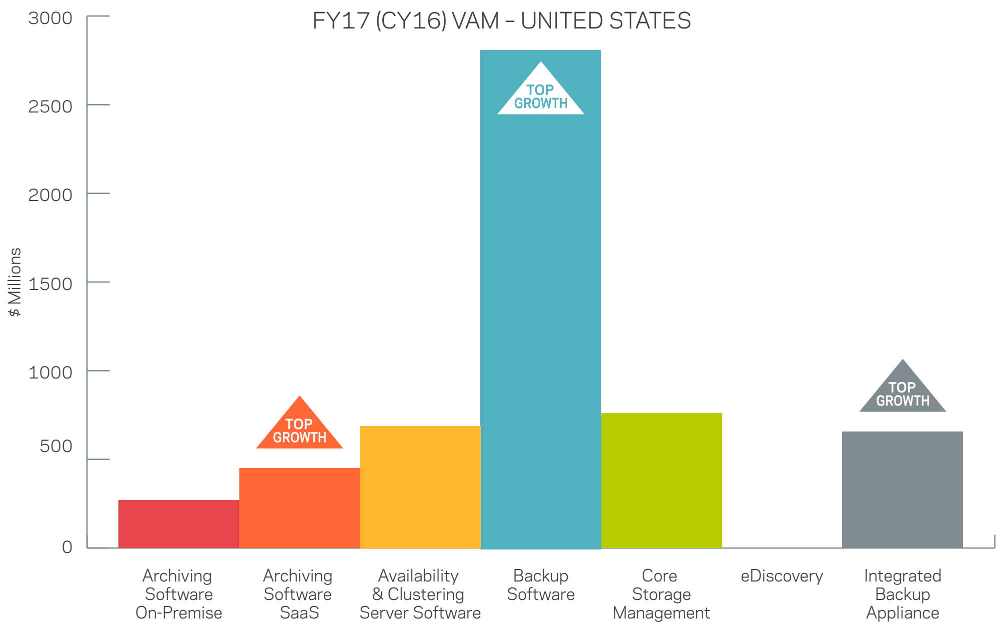
FY17: April 16 to Mar 17

UNITED STATES - FY17 MARKET OPPORTUNITY

Product Market	FY17 (CY16) VAM	FY16 (CY15) VAM	FY16-17 (CY15-16) Market Growth	Veritas CY14 Market Rank
Archiving Software On-Premise	$269 M	$265 M	1.5%	1
Archiving Software SaaS	$451 M	$425 M	6.1%	3
Availability and Clustering Server Software	$688 M	$677 M	1.7%	3
Backup Software^	$2,995 M	$2,772 M	8.0%	1
Core Storage Management	$761 M	$791 M	-3.9%	2
eDiscovery^^	-	-	-	-
Integrated Backup Appliance	$656 M	$575 M	14.0%	-
Totals	$5,819 M	$5,506 M	5.7%	-

^Includes both NetBackup and Backup Exec.
^^ Country breakdown not available for eDiscovery.

FY17: April 16 to Mar 17



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[3] IDC, Unlocking the Hidden Value of Information, July 2014 – https://idc-community.com/?signin&r=%2fgroups%2fit_agenda%2fbusiness-analyics-big-data%2funlocking_the_hidden_value_of_information

[4] Global Graphics, Knowledge Management – http://www.globalgraphics.com/technology/knowledge-management/

[5] Computerworld Forecast Study 2015

[6] Gartner, The Coming Converged Infrastructure Vendor Battle and What to Do About It, Feb 2015, George J. Weiss

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

GLOSSARY

CAGR: Compound Annual Growth Rate

CDO: Chief Data Officer

CI: Converged Infrastructure

CIO: Chief Information Officer

CISO: Chief Information Security Officer

CTO: Chief Technology Officer

EDRM: Electronic Document and Records Management

FY: Financial Year

SaaS: Software-as-a-Service

VAM: Veritas Addressable Market (Serviceable Addressable Market)