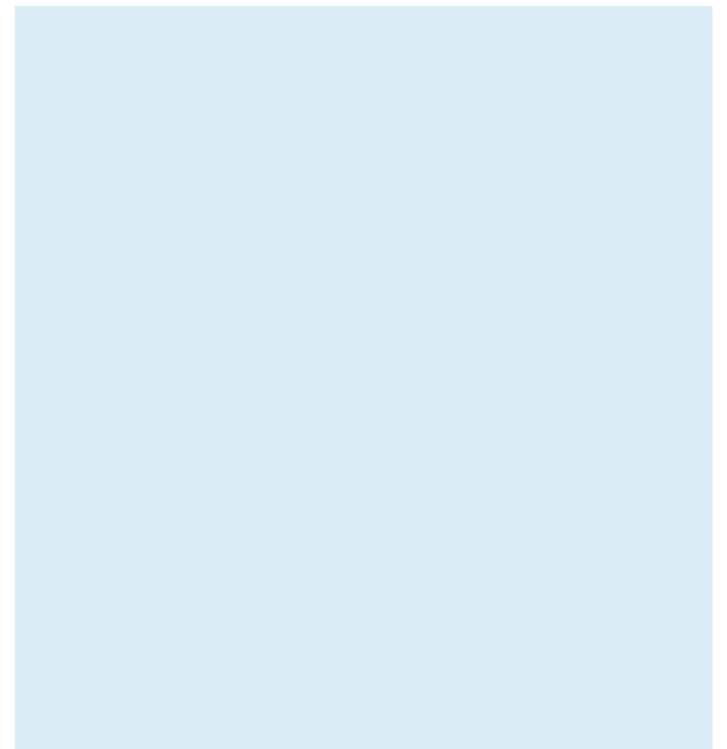
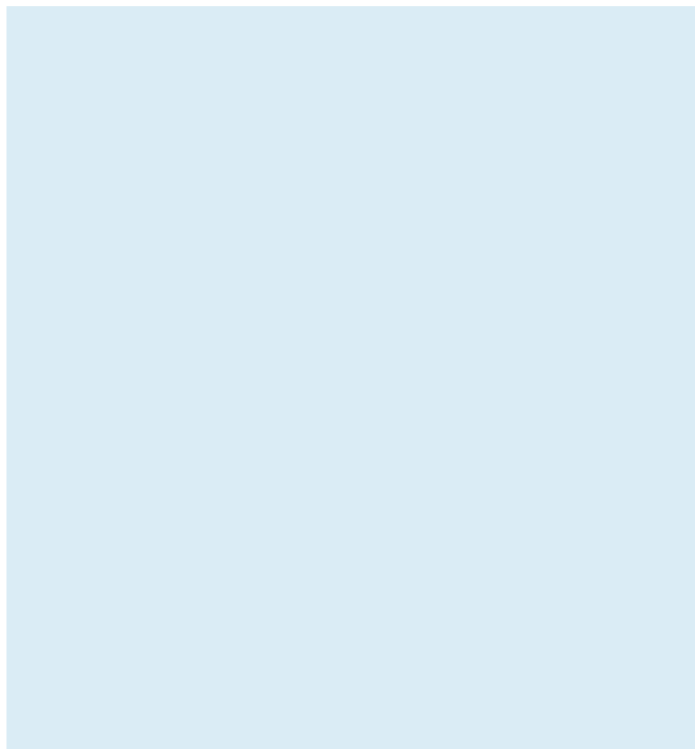
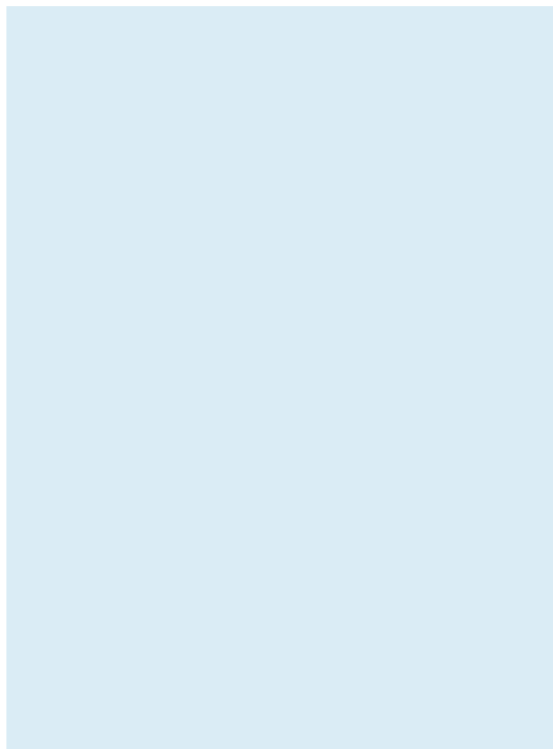


VERITAS™

Veritas Market Opportunity Guide

EMEA FY16 / FY17 PLANNING

CONTENTS



WHY VERITAS?

The world's data is growing rapidly – set to reach **44 zettabytes** globally by 2020¹. 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.

Veritas is joining forces with partners to support organisations 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 organisations to harness the power of their information, wherever it resides, by delivering solutions that drive availability and reveal insights.

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 organisations 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 organisations 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 	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
	Legal 			<input checked="" type="checkbox"/>	
	Risk and Compliance Officer or GPO 			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Strategic IT/ Decision Makers	CIO/IT Director 	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Head of Infrastructure 		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	CISO 				
	Head of IT Operations 		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	IT Engineering/Architecture 				<input checked="" type="checkbox"/>
Functional IT/ Influencers	Backup Admin 		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Database Admin 		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
	Storage Admin 		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Virtualization Admin 		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>

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 2017) 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 information³. It's also been shown that unstructured data is growing at twice the rate of structured content⁴. 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 **2x**
at 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 visibility
- Lower overall data volumes
- Reduced storage costs

EU DATA REGULATION

The EU General Data Protection Regulation (GDPR) is due to be agreed by member states before the end of the year and expected to come into force by 2017. 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 (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

terms due to be agreed by the end of 2015

EU DATA REGULATION



VERITAS SOLUTION: INFORMATION GOVERNANCE

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

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 visibility
- Achieving compliance
- Reduced financial risk

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 2015⁵. 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

50%
market growth
forecast for 2015

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

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-centre into a business asset by discovering valuable insights.

CUSTOMER OUTCOMES

- Reliable SLA compliance
- Faster move to hybrid cloud

\$6bn
market opportunity

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 estimated revenue from CI in 2014 was **\$6 billion**⁶ and a growth of 30% is forecast in 2015⁶.

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

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 modernisation - 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

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.

BRAND	IT'S TIME FOR VERITAS											
KEY TRENDS	UNSTRUCTURED DATA - The rapid growth of data, value unknown											
	GLOBAL REGULATORY LANDSCAPE - Achieving compliance with stricter regulations											
	HYBRID CLOUD ADOPTION - The need for continuity throughout transitions											
	CONVERGED INFRASTRUCTURE - Visibility and efficient management across silos											
CAMPAIGNS	Return on Information (ROI)				Information Availability (<i>coming soon</i>)				Forward Thinking Backup		Backup Exec (<i>coming soon</i>)	
SOLUTIONS	INFORMATION GOVERNANCE Understanding and regaining control of data				INFORMATION AVAILABILITY Making applications and data available, wherever they reside				ENTERPRISE BACKUP AND RECOVERY Protecting business data and ensuring availability		MIDMARKET BACKUP AND RECOVERY Efficient and reliable backup and recovery	
PLAYS	Information Governance - visibility and insight, retention management and automated workflow				Information Agility and Resiliency						Hybrid Cloud (MSP)	Capacity Licensing
					Business Continuity		Storage Management		Converged Backup			
PRODUCTS	Enterprise Vault & EV.cloud	Data Insight	Information Map	eDiscovery	InfoScale Enterprise				NetBackup Appliances	NetBackup Software	Backup Exec	
					InfoScale Availability	Veritas Resiliency Platform	InfoScale Storage	InfoScale Foundation	System Recovery			
COMPETENCIES	Archiving			eDiscovery	Dynamic Storage and Continuity				Enterprise Backup and Recovery		Mid-market Backup and Recovery	

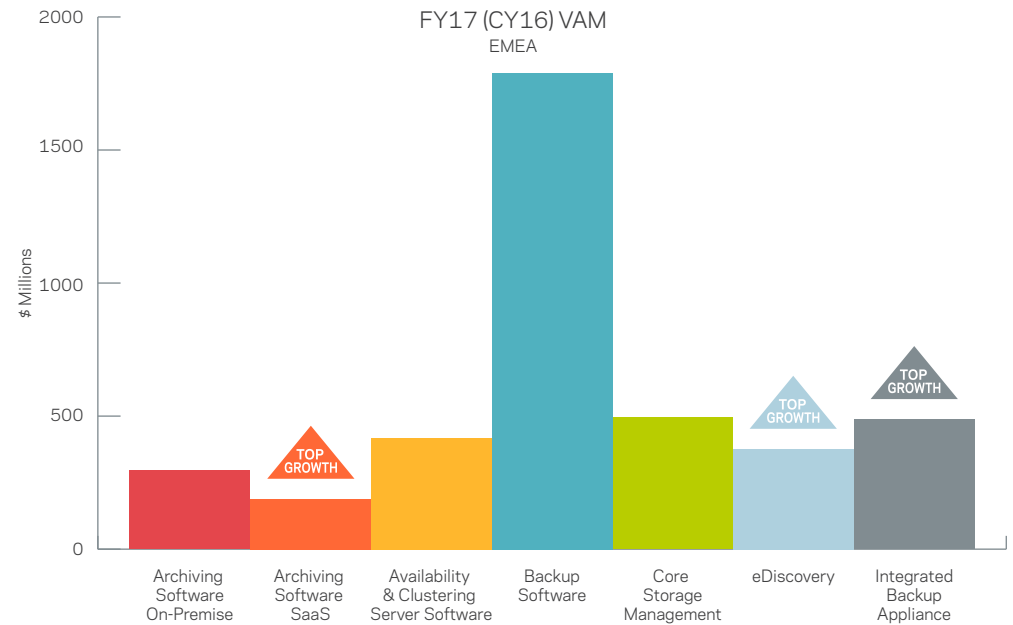
EMEA -
FY17 TOP
GROWTH
COUNTRIES

Hover over the pins to show information

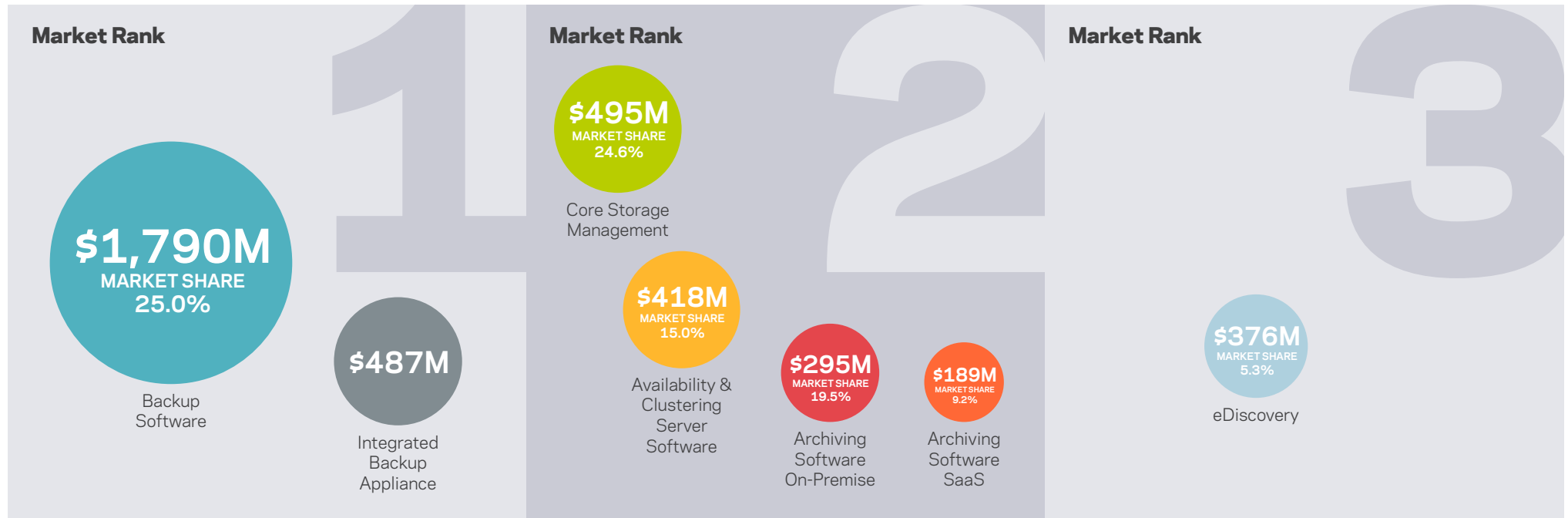


EMEA - FY17 MARKET OPPORTUNITY

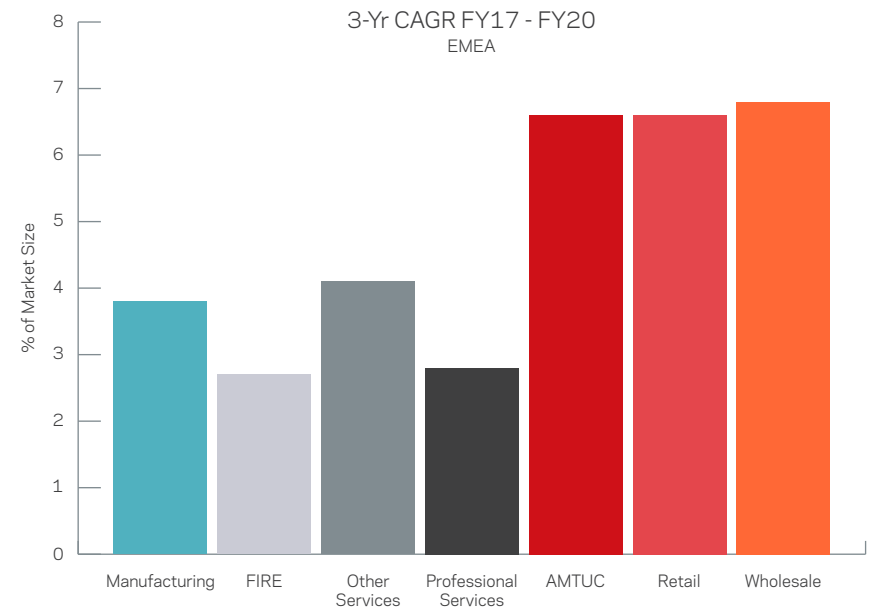
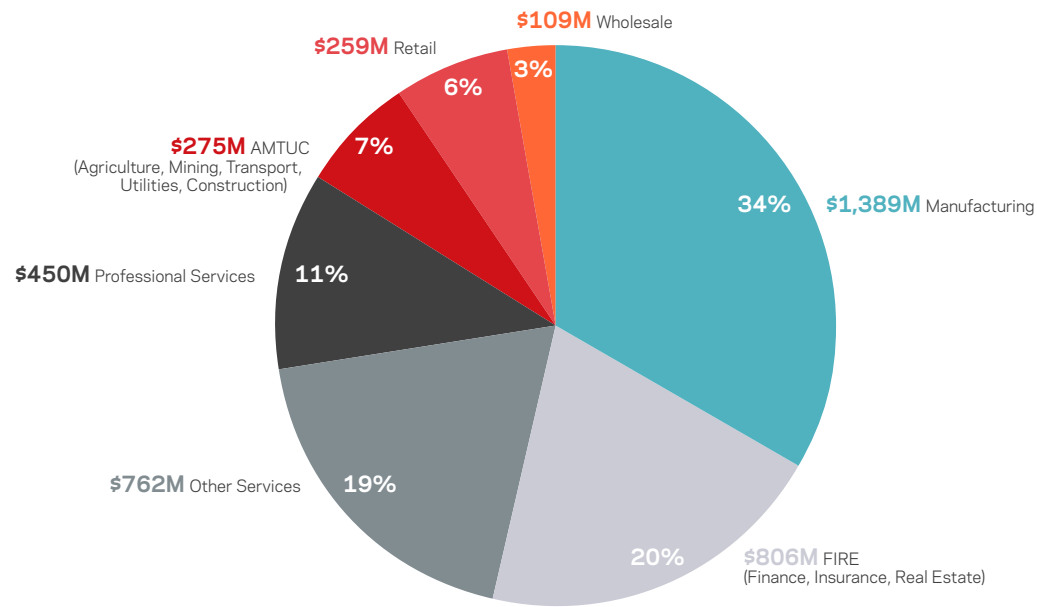
Product Market	FY17 (CY16) VAM	FY16 (CY15) VAM	FY16-17 (CY15-16) Market Growth	Veritas CY14 Market Rank
Archiving Software On-Premise	\$295 M	\$297 M	0%	-
Archiving Software SaaS	\$189 M	\$160 M	18.3%	2
Availability and Clustering Server Software	\$418 M	\$411 M	1.7%	2
Backup Software	\$1,790 M	\$1,666 M	7.4%	1
Core Storage Management	\$495 M	\$505 M	-2.0%	2
eDiscovery	\$376 M	\$336 M	11.8%	3
Integrated Backup Appliance	\$487 M	\$435 M	11.9%	-
Totals	\$4,051 M	\$3,811 M	6.3%	-



EMEA - FY17 OPPORTUNITY OVERVIEW

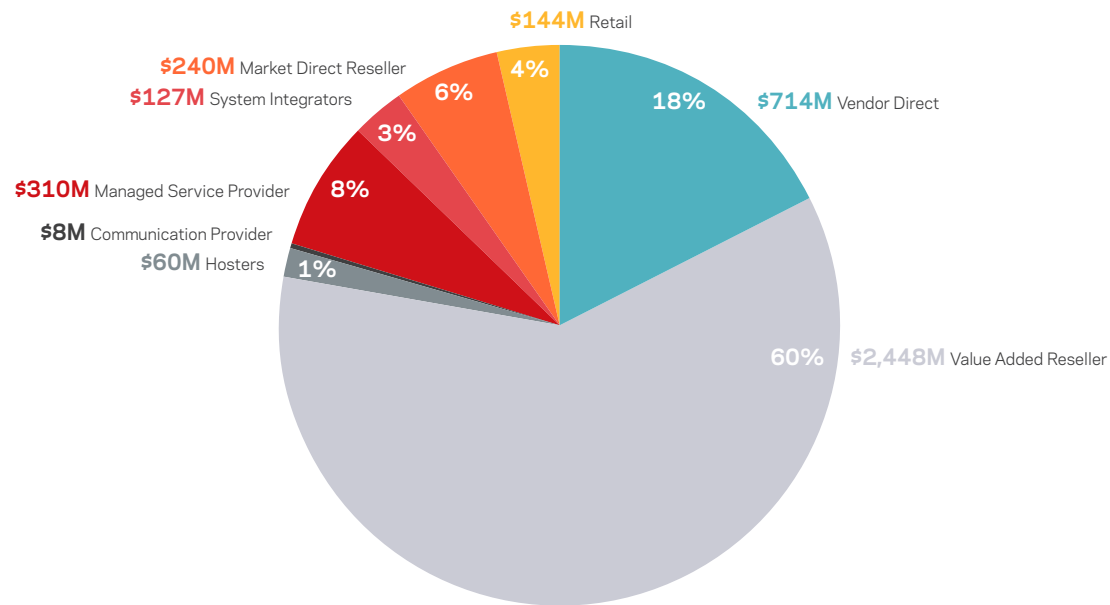


EMEA - MARKET SIZE BY VERTICAL

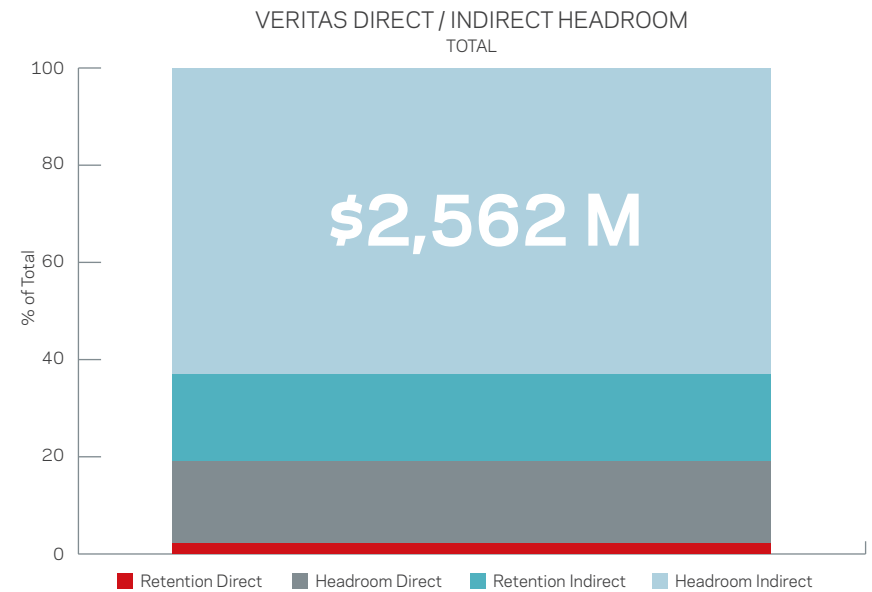


Source: AMI Q1-2015 SMB Verticals (31.03.15), AMI Q1-2015 LB Verticals (31.03.15)

EMEA - PARTNER MARKET SIZE

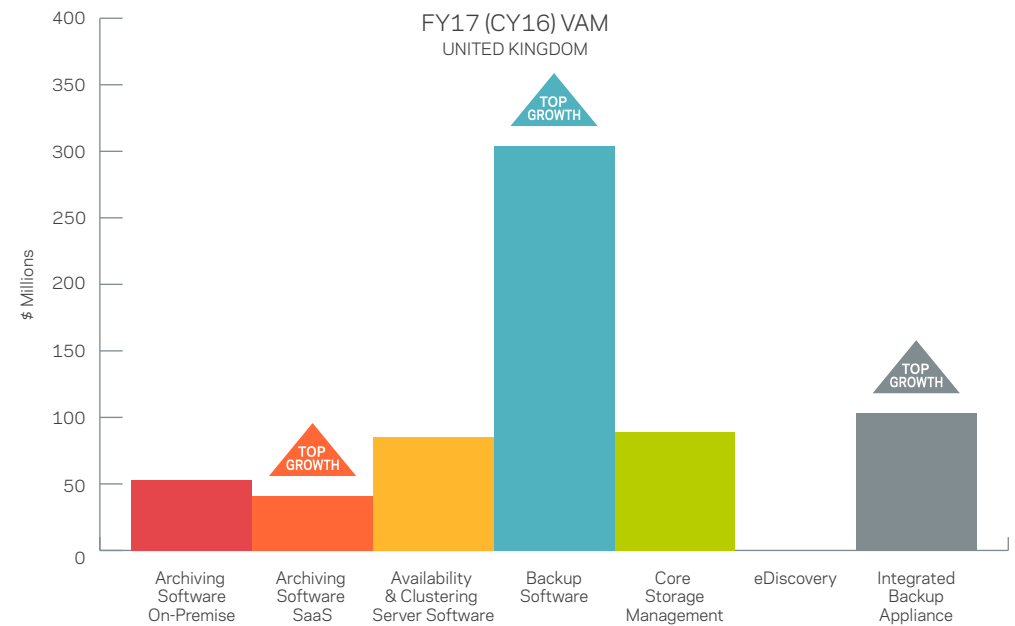


Sources: Market & Customer Insights. Symantec Business Intelligence / Finance, Planning and Analysis / Proprietary market analysis based on IDC and Gartner ICT global spending research. AMI Q1-2015 SMB Routes-to-Market (31.03.15). AMI Q1-2015 LB Routes-to-Market (31.03.15)



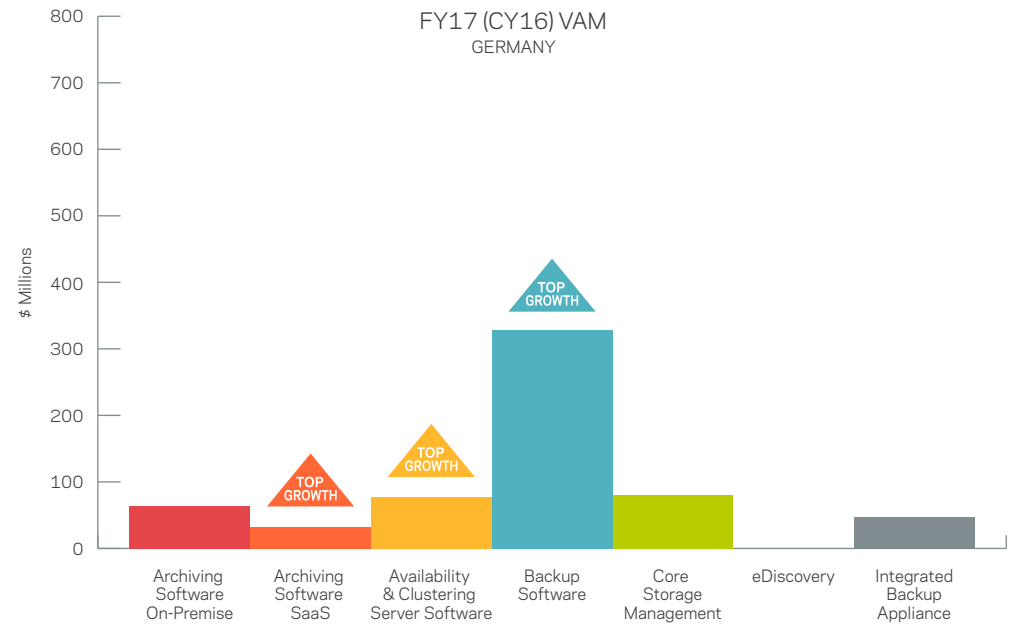
UNITED KINGDOM - FY17 MARKET OPPORTUNITY

Product Market	FY17 (CY16) VAM	FY16 (CY15) VAM	FY16-17 (CY15-16) Market Growth	Veritas CY14 Market Rank
Archiving Software On-Premise	\$53 M	\$53 M	0%	1
Archiving Software SaaS	\$41 M	\$35 M	16.7%	2
Availability and Clustering Server Software	\$85 M	\$84 M	1.1%	1
Backup Software	\$304 M	\$283 M	7.3%	1
Core Storage Management	\$89 M	\$93 M	-3.5%	1
eDiscovery	-	-	-	-
Integrated Backup Appliance	\$103 M	\$92 M	12.1%	-
Totals	\$674 M	\$639 M	5.5%	-



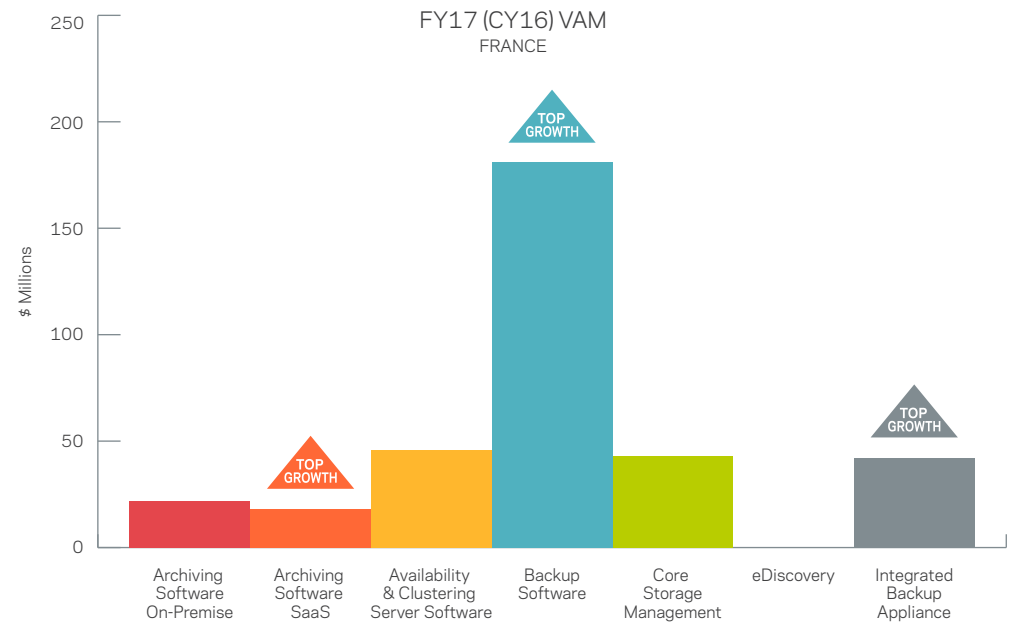
GERMANY - FY17 MARKET OPPORTUNITY

Product Market	FY17 (CY16) VAM	FY16 (CY15) VAM	FY16-17 (CY15-16) Market Growth	Veritas CY14 Market Rank
Archiving Software On-Premise	\$64 M	\$64 M	0%	2
Archiving Software SaaS	\$32 M	\$26 M	19.2%	4
Availability and Clustering Server Software	\$77 M	\$76 M	1.4%	5
Backup Software	\$328 M	\$303 M	8.2%	2
Core Storage Management	\$80 M	\$81 M	0%	2
eDiscovery	-	-	-	-
Integrated Backup Appliance	\$47 M	\$42 M	11.7%	-
Totals	\$628 M	\$593 M	6.0%	-



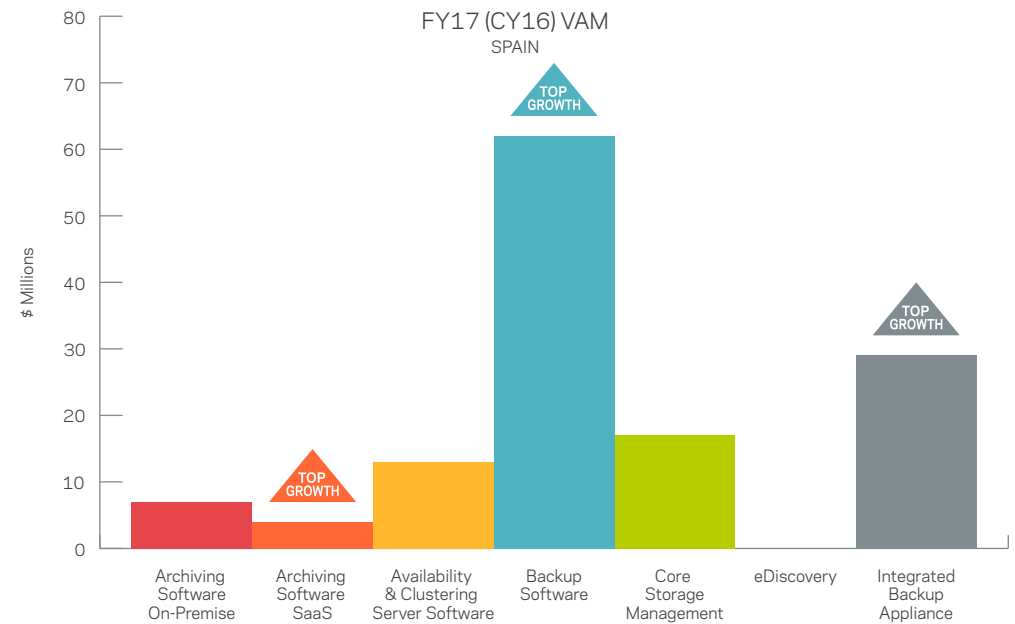
FRANCE - FY17 MARKET OPPORTUNITY

Product Market	FY17 (CY16) VAM	FY16 (CY15) VAM	FY16-17 (CY15-16) Market Growth	Veritas CY14 Market Rank
Archiving Software On-Premise	\$22 M	\$23 M	-6.3%	3
Archiving Software SaaS	\$18 M	\$15 M	19.4%	5
Availability and Clustering Server Software	\$46 M	\$46 M	0%	5
Backup Software	\$181 M	\$171 M	5.7%	1
Core Storage Management	\$43 M	\$43 M	0%	2
eDiscovery	-	-	-	-
Integrated Backup Appliance	\$42 M	\$38 M	11.7%	-
Totals	\$352 M	\$337 M	4.4%	-



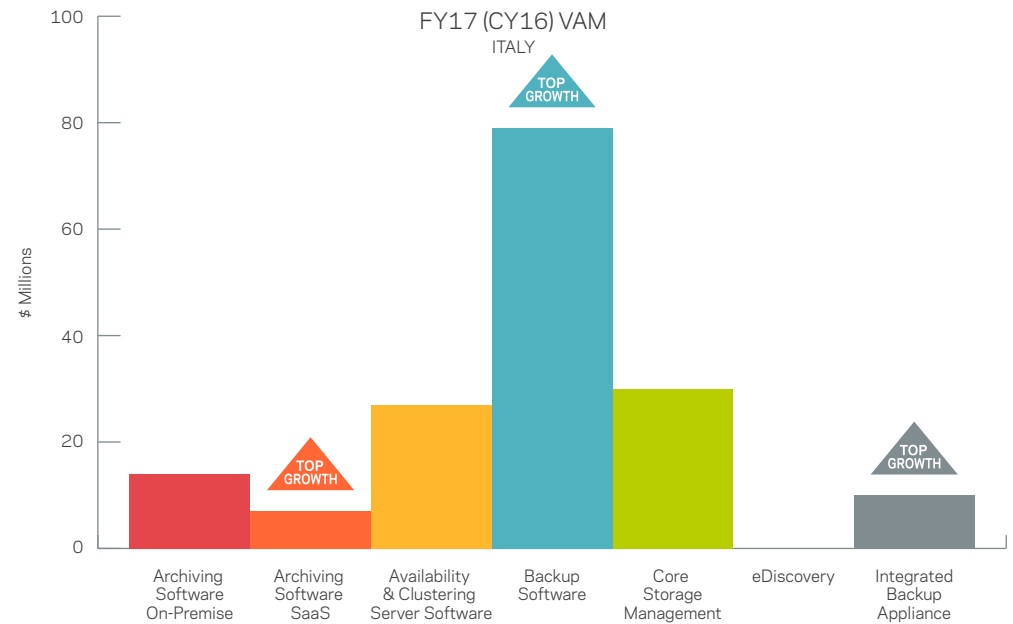
SPAIN - FY17 MARKET OPPORTUNITY

Product Market	FY17 (CY16) VAM	FY16 (CY15) VAM	FY16-17 (CY15-16) Market Growth	Veritas CY14 Market Rank
Archiving Software On-Premise	\$7 M	\$8 M	-1.8%	2
Archiving Software SaaS	\$4 M	\$3 M	16.2%	4
Availability and Clustering Server Software	\$13 M	\$13 M	0.3%	2
Backup Software	\$62 M	\$59 M	5.8%	1
Core Storage Management	\$17 M	\$18 M	-5.7%	2
eDiscovery	-	-	-	-
Integrated Backup Appliance	\$29 M	\$25 M	12.3%	-
Totals	\$132 M	\$126 M	4.7%	-



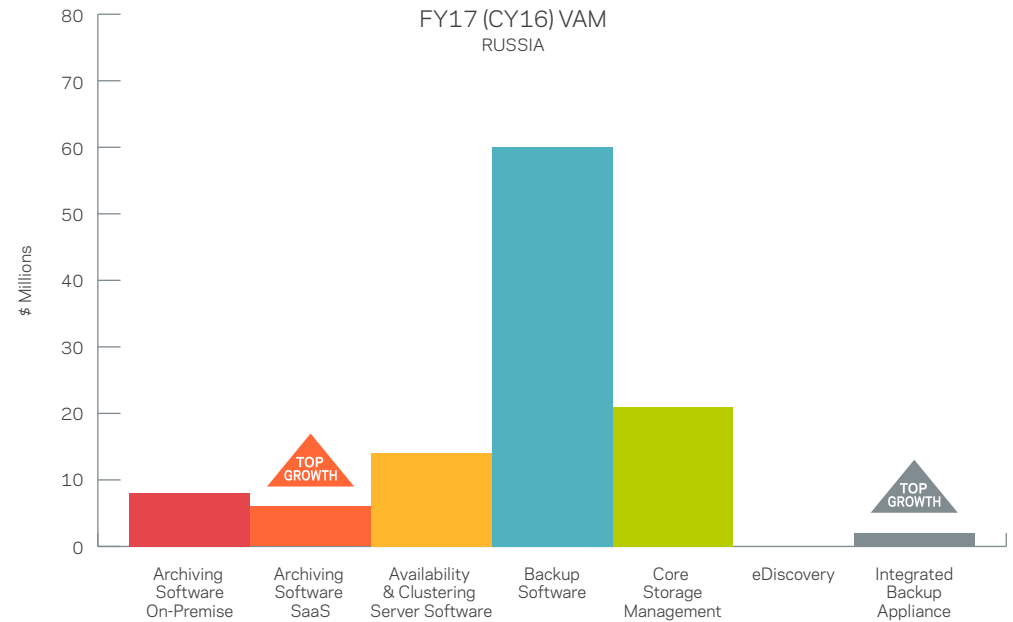
ITALY - FY17 MARKET OPPORTUNITY

Product Market	FY17 (CY16) VAM	FY16 (CY15) VAM	FY16-17 (CY15-16) Market Growth	Veritas CY14 Market Rank
Archiving Software On-Premise	\$14 M	\$14 M	-4.1%	2
Archiving Software SaaS	\$7 M	\$6 M	16.8%	5
Availability and Clustering Server Software	\$27 M	\$27 M	0%	3
Backup Software	\$79 M	\$75 M	5.7%	3
Core Storage Management	\$30 M	\$29 M	0.8%	2
eDiscovery	-	-	-	-
Integrated Backup Appliance	\$10 M	\$9 M	11.8%	-
Totals	\$167 M	\$161 M	3.7%	-



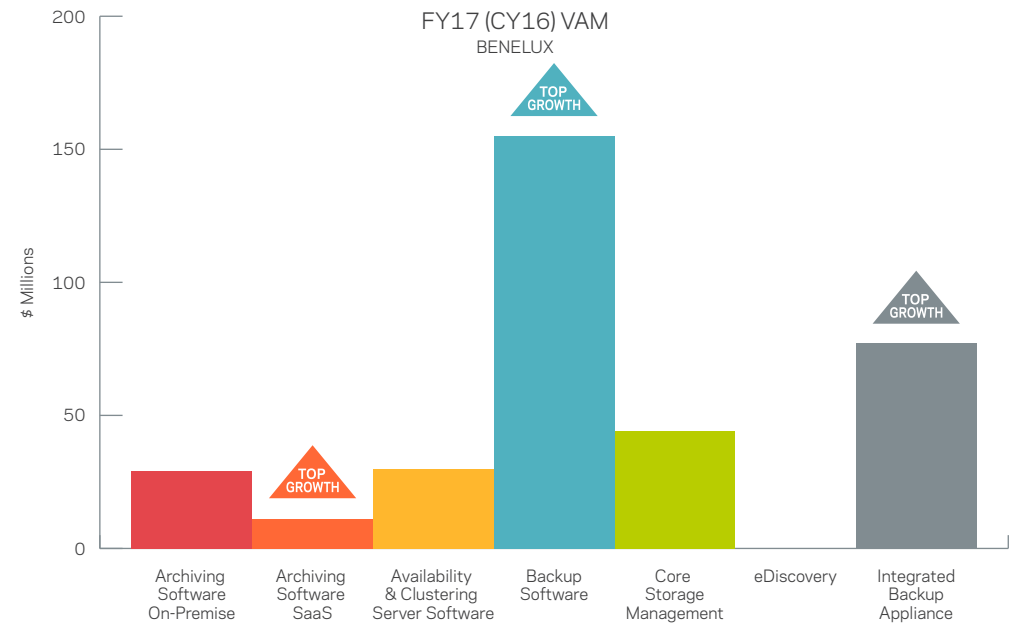
RUSSIA - FY17 MARKET OPPORTUNITY

Product Market	FY17 (CY16) VAM	FY16 (CY15) VAM	FY16-17 (CY15-16) Market Growth	Veritas CY14 Market Rank
Archiving Software On-Premise	\$8 M	\$9 M	-5.8%	4
Archiving Software SaaS	\$6 M	\$6 M	9.4%	0
Availability and Clustering Server Software	\$14 M	\$14 M	0%	1
Backup Software	\$60 M	\$60 M	0%	2
Core Storage Management	\$21 M	\$22 M	-5.9%	1
eDiscovery	-	-	-	-
Integrated Backup Appliance	\$2 M	\$2 M	11.8%	-
Totals	\$111 M	\$112 M	-1.1%	-



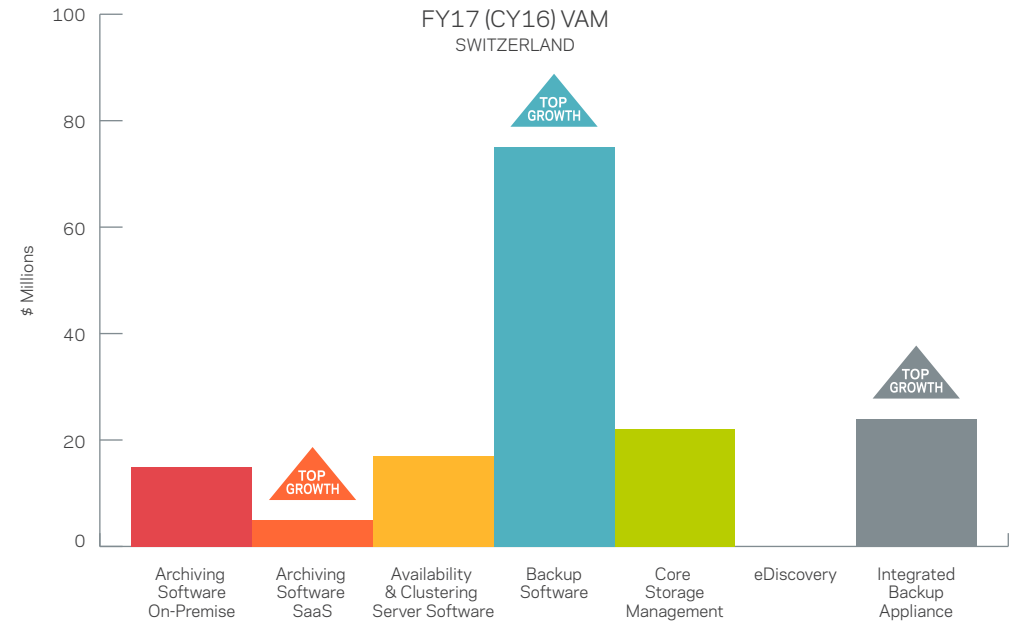
BENELUX - FY17 MARKET OPPORTUNITY

Product Market	FY17 (CY16) VAM	FY16 (CY15) VAM	FY16-17 (CY15-16) Market Growth	Veritas CY14 Market Rank
■ Archiving Software On-Premise	\$29 M	\$29 M	0%	1
■ Archiving Software SaaS	\$11 M	\$10 M	15.8%	3
■ Availability and Clustering Server Software	\$30 M	\$30 M	0%	3
■ Backup Software	\$155 M	\$147 M	5.9%	1
■ Core Storage Management	\$44 M	\$43 M	1.2%	2
■ eDiscovery	-	-	-	-
■ Integrated Backup Appliance	\$77 M	\$68 M	12.1%	-
■ Totals	\$346 M	\$327 M	5.8%	-



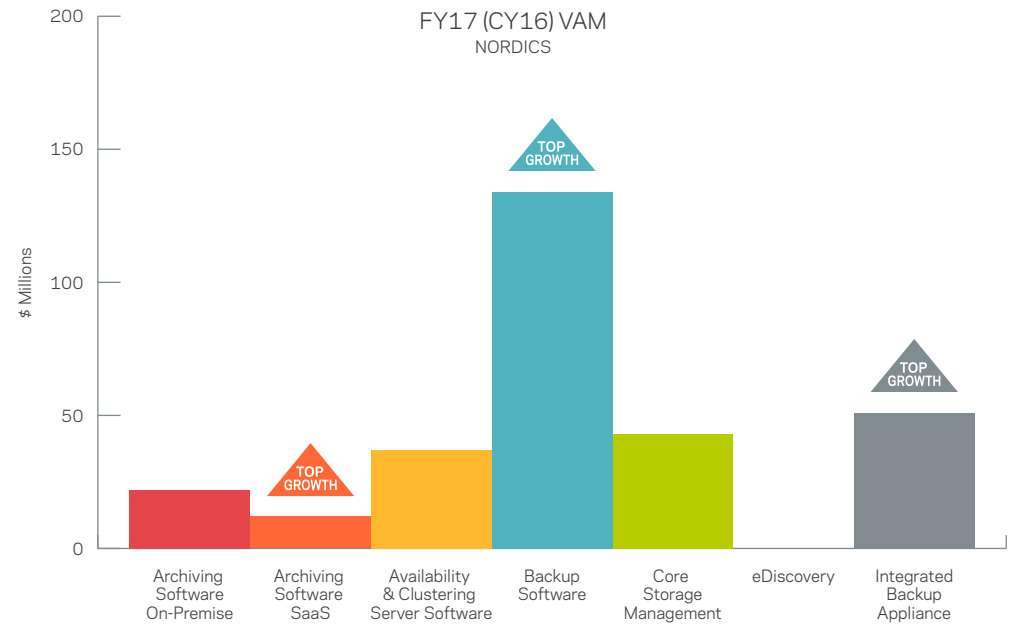
SWITZERLAND - FY17 MARKET OPPORTUNITY

Product Market	FY17 (CY16) VAM	FY16 (CY15) VAM	FY16-17 (CY15-16) Market Growth	Veritas CY14 Market Rank
Archiving Software On-Premise	\$15 M	\$15 M	1.8%	2
Archiving Software SaaS	\$5 M	\$5 M	17.6%	4
Availability and Clustering Server Software	\$17 M	\$16 M	1.8%	5
Backup Software	\$75 M	\$70 M	7.9%	1
Core Storage Management	\$22 M	\$23 M	-6.0%	3
eDiscovery	-	-	-	-
Integrated Backup Appliance	\$24 M	\$21 M	12.1%	-
Totals	\$158 M	\$150 M	5.4%	-



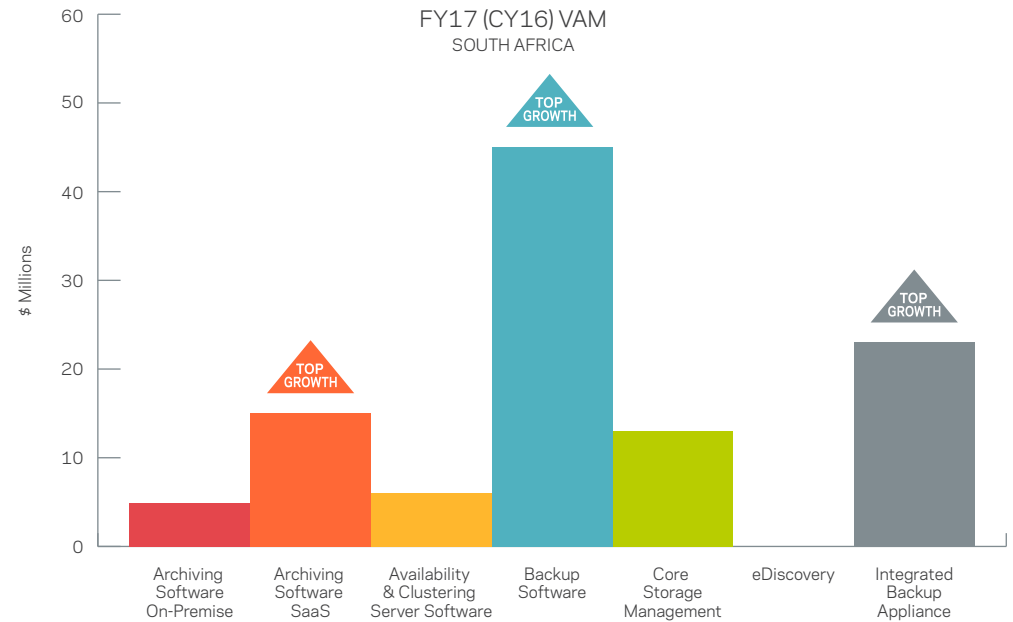
NORDICS - FY17 MARKET OPPORTUNITY

Product Market	FY17 (CY16) VAM	FY16 (CY15) VAM	FY16-17 (CY15-16) Market Growth	Veritas CY14 Market Rank
Archiving Software On-Premise	\$22 M	\$21 M	7.7%	-
Archiving Software SaaS	\$12 M	\$11 M	65.7%	-
Availability and Clustering Server Software	\$37 M	\$36 M	10.4%	-
Backup Software	\$134 M	\$124 M	32.3%	-
Core Storage Management	\$43 M	\$44 M	0%	-
eDiscovery	-	-	-	-
Integrated Backup Appliance	\$51 M	\$46 M	47.3%	-
Totals	\$300 M	\$281 M	6.5%	-



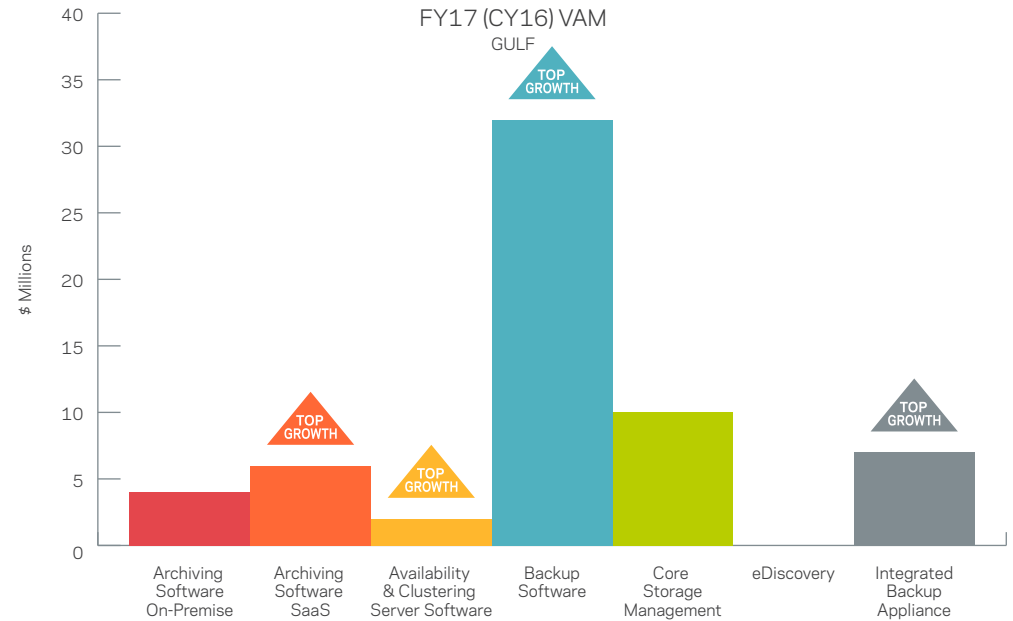
SOUTH AFRICA - FY17 MARKET OPPORTUNITY

Product Market	FY17 (CY16) VAM	FY16 (CY15) VAM	FY16-17 (CY15-16) Market Growth	Veritas CY14 Market Rank
Archiving Software On-Premise	\$4 M	\$4 M	-10.9%	3
Archiving Software SaaS	\$15 M	\$13 M	18.5%	2
Availability and Clustering Server Software	\$6 M	\$6 M	1.6%	4
Backup Software	\$45 M	\$41 M	8.1%	1
Core Storage Management	\$13 M	\$13 M	-5.1%	3
eDiscovery	-	-	-	-
Integrated Backup Appliance	\$23 M	\$20 M	12.4%	-
Totals	\$105 M	\$98 M	7.3%	-



GULF - 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	\$4 M	\$4 M	0.6%	6
Archiving Software SaaS	\$6 M	\$5 M	28.6%	0
Availability and Clustering Server Software	\$2 M	\$2 M	12.0%	8
Backup Software	\$32 M	\$28 M	13.3%	4
Core Storage Management	\$10 M	\$10 M	-3.2%	3
eDiscovery	-	-	-	-
Integrated Backup Appliance	\$7 M	\$7 M	12.0%	-
Totals	\$61 M	\$55 M	10.6%	-



REFERENCES

¹ IDC, Digital Universe Study 2014

² 2012 Compliance, Governance and Oversight Counsel (CGOC) Summit

³ 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

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

GDPR: General Data Protection Regulations

SaaS: Software-as-a-Service

VAM: Veritas Addressable Market
(Serviceable Addressable Market)

VERITAS™

