

乘“雲”翱翔，重返榮耀
~ 喬鼎資訊策略方向 ~

Value, not volume
Transform storage device provider to solution provider

- IT trend
- Market opportunities
- Worldwide Promise Technology
- Promise snapshot
- Customers ,partners and product
- The way Promise want to go
- Target market and strategy

IT Trend - IDC predictions 2013 (2012/11)

- 2013 WW IT spending: \$2.1T (up 5.7%)
- By 2020, when the ICT industry reaches \$5 trillion.
- The 5 key technologies drive 98% of future ICT growth: **IOT**, Mobile, **Cloud computing**, Social business and **Big Data Analytics**. (22% to 40%)
- Gartner: 80% couldn't get the benefit from Big Data by 2015.

**ICT Innovation
2005–2020+**

**ICT Innovation
1985–2005**



- Cloud
 - WW cloud market: \$ 67.6B(2014, CAGR 38%)
 - WW cloud storage: \$ 12.1B (2014, CAGR 40%)
- Big Data
 - WW \$10B in 2013. \$20B in 2016. (CAGR 39%)
 - China : \$0.08B to \$0.6B in 2016 (CAGR 51% ,IDC)
 - Taiwan: \$0.024B in 2012 to 0.0365B by 2015.(CAGR 24% ,III MIC)
- Surveillance Storage
 - WW \$6.4B in 2015 (CAGR 19%, PIDA)
- Rich media
 - WW \$ 11.9B in 2018 (CAGR 14%, Coughlin)

WW PROMISE Technology

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● ● PROMISE OFFICE



Worldwide employee no. 450+ 2012 Rev. : US\$ 105M

Promise snapshot

- IDC 2013 Q1 ECB: \$ 5.9B. (Growth rate : - 0.9%)
- Market share 0.48% (v.s. Oracle 1.44%) (Gain share: 7.6% v.s.-0.9%)
- Characteristics
 - High Margin 39.7% > Apple, RD/Rev. 15~17% > 6%~8%
 - Promise brand v.s. OEM: 45% v.s. 55%
 - 80%+ revenue from US & EMEA, WW brand, S&M channel & service

| Vendors | 2013 Q1 Rev. (US\$M) | 2013 Q1 Market Share | 2012 Q1 Market Share | Rev. growth rate |
|---------|-------------------------|-------------------------|-------------------------|------------------|
| EMC | 1,794 | 30.4% | 29% | 3.8% |
| NetApp | 879 | 14.9% | 14.1% | 4.5% |
| IBM | 643 | 10.9% | 11.4% | -5.3% |
| Hitachi | 525 | 8.9% | 9.4% | -6.2% |
| HP | 502 | 8.5% | 10.2% | -17.5% |
| Others | 1,564 | 26.5% | 26% | 1.2% |
| Promise | 28 | 0.48% | 0.41% | 7.6% |

Market Recognition

Worldwide Block External Controller-Based Disk Storage Vendor Unit Market Share

| | Vender | Units | Share (%) |
|----------|------------------|---------------|------------|
| 1 | HP | 57,324 | 16.2 |
| 2 | Dell | 48,901 | 13.8 |
| 3 | EMC | 38,676 | 10.9 |
| 4 | IBM | 21,308 | 6.0 |
| 5 | NetApp | 20,963 | 5.9 |
| 6 | Oracle-Sun Micro | 13,840 | 3.9 |
| 7 | Fujitsu | 13,276 | 3.7 |
| 8 | Hitachi/HDS | 12,725 | 3.6 |
| 9 | Promise | 12,717 | 3.6 |
| 10 | Dot Hill | 3,606 | 1.0 |

Worldwide Block Entry-Level Modular Disk Array Vendor Unit Market Share (\$0 to \$24,999)

| | Vender | Units | Share (%) |
|----------|------------------|---------------|------------|
| 1 | HP | 38,688 | 18.8 |
| 2 | Dell | 30,796 | 15 |
| 3 | EMC | 12,717 | 6.2 |
| 4 | Promise | 10,007 | 4.9 |
| 5 | NetApp | 7,202 | 3.5 |
| 6 | IBM | 6,636 | 3.2 |
| 7 | Fujitsu | 4,615 | 2.2 |
| 8 | Dot Hill | 3,472 | 1.7 |
| 9 | Nexsan | 3,081 | 1.5 |
| 10 | Oracle-Sun Micro | 2,695 | 1.3 |

Worldwide Block Entry-Level Modular Disk Array Vendor Revenue Market Share (\$0 to \$24,999)

| | Vender | Revenue(\$M) | Share (%) |
|-----------|------------------|--------------|------------|
| 1 | Dell | 420.9 | 21.9 |
| 2 | HP | 400.5 | 20.9 |
| 3 | EMC | 153.9 | 8 |
| 4 | IBM | 125.3 | 6.5 |
| 5 | NetApp | 96 | 5 |
| 6 | Fujitsu | 63.2 | 3.3 |
| 7 | Nexsan | 43.3 | 2.3 |
| 8 | Oracle-Sun Micro | 42.6 | 2.2 |
| 9 | Hitachi/HDS | 42.6 | 2.2 |
| 10 | Promise | 40.6 | 2.1 |

Source: Gartner

Market Share: External Controller-Based Disk Storage, Worldwide, 2007-2010

Publish Date: 2011/04

Worldwide customers and Partners

PROMISE[®]
TECHNOLOGY, INC.

Microsoft[®]



acer

AMD 

ASUS[®]



PMC
PMC-SIERRA

SONY

TOSHIBA
Leading Innovation >>>

HITACHI
Inspire the Next



Western Digital[®]

FUJITSU

SUPERMICRO[®]

NEC

Kodak

AVNET[®]



wistron

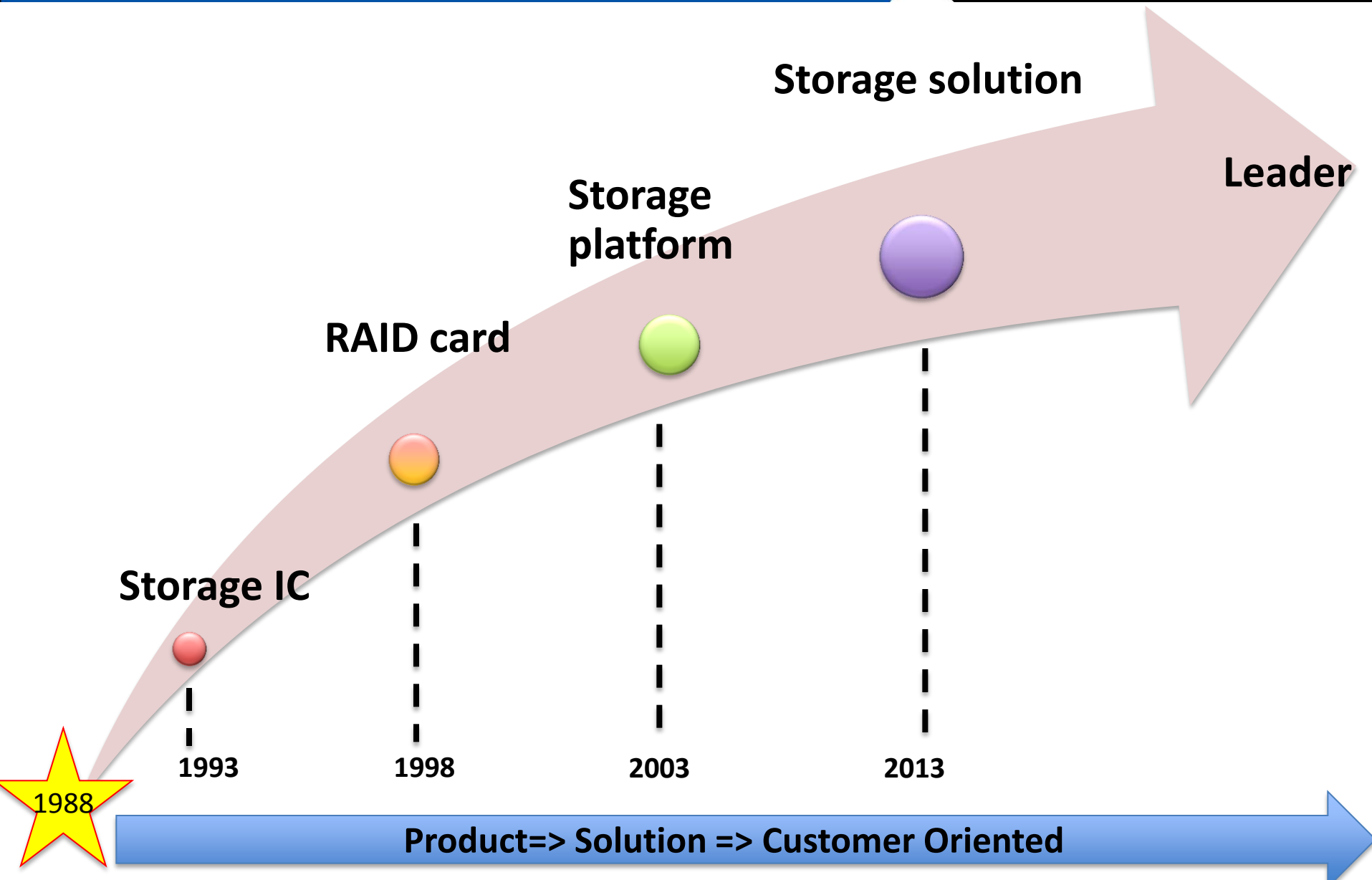


TYAN



lenovo 联想

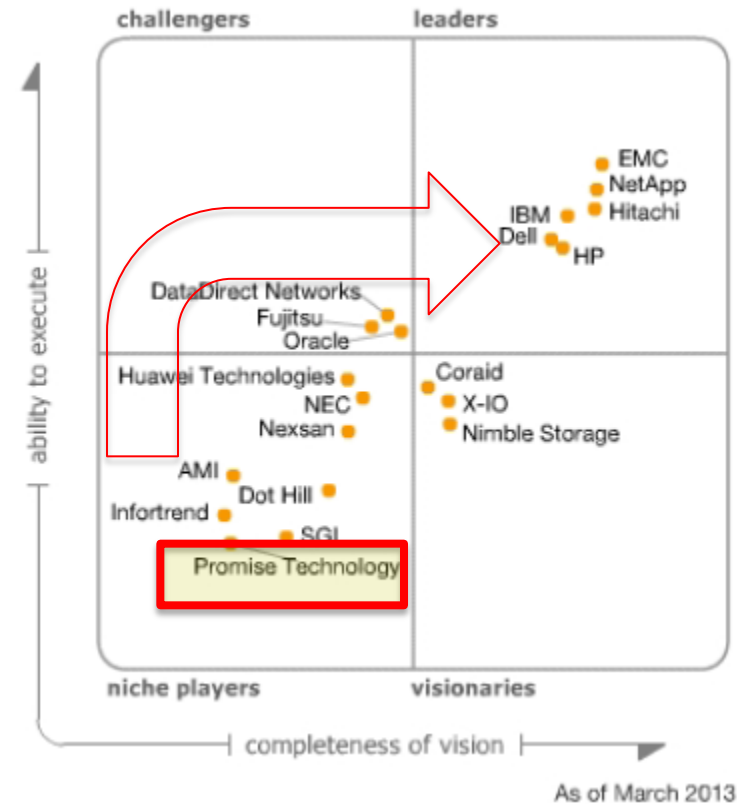
同有 北京同有飞骥科技有限公司
TOYOU TOYOU FEIJI ELECTRONICS CO.,LTD.



The way Promise want to go

- Provide storage solution to compete big name of WW storage
- How to achieve:
 - Focus on storage application instead of HW & FW focus to penetrate cloud and enterprise storage market.
 - Industry application, not IT application
 - Surveillance: Vess A-Class
 - Rich Media: Vtrak A-Class
 - Cloud storage: File Cruiser, Object Storage, Block Storage.

Gartner Report 2013-03-21



Target Market & Strategy Planning

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Surveillance

Cloud

Rich & Media

Customer
oriented

Market

PIDA:

1. 2015 Worldwide surveillance storage will reach US\$ 3.8B with 19% CAGR.

Strategy

1. Ally with WW VMS leader to develop next generation of VMS.
2. Provide tailor made surveillance solution with better performance.

Market

Markets and Markets:

1. 2018 Worldwide cloud storage will reach US\$ 46.8B with 40% CAGR

Strategy

1. Provide SAAS and IAAS with object cloud end to end solution to Government, enterprise and education industry.

Market

Coughlin (2012) :

1. The storage of R&M will grow to US\$ 11.9B in 2018 with 14% CAGR.

Strategy

1. Provide 4K & 8K HD ready SAN solution
2. Penetrate back up and archive segment

Industry oriented storage solution

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IT/Cloud storage

**Platform – VTrak, Vess
and Storage Server**



**Solutions – FileCruiser: File
Sharing and Synchronization**



**Solutions – Scale-Out Object
and Cloud Block Storage**



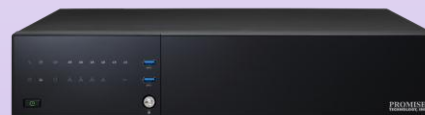
Markets for Private Cloud

- Educations, Telecomm.,
Manufacturing, Enterprises,
Transportations, Financial
Institutes, Medicare, etc.

Surveillance storage



Vess A2600



Vess A2200



Vess R2000 Series

Rich media storage



VTrak A-Class
VTrak x30 Series

Blackmagicdesign

AJA
VIDEO SYSTEMS



SANLink



Pegasus R4/R6



Pegasus J4 & Pegasus J2



Marketing Presence

PROMISE[®]
TECHNOLOGY, INC.



2013 CeBIT in Hannover Germany



Computex 2013 in Taipei Taiwan

Marketing Presence

PROMISE[®]
TECHNOLOGY, INC.



2013 NAB Show in Las Vegas



IFSEC 2013 in Birmingham, UK

Marketing Presence

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TECHNOLOGY, INC.



ISC West/ USA



IFSEC/UK



NAB/ USA



Taiwan Solution Day



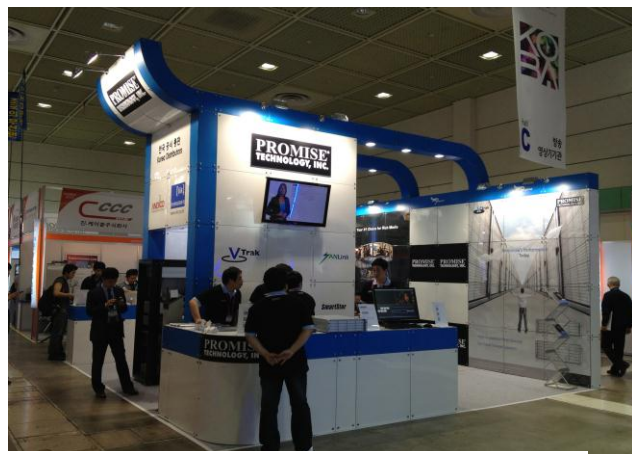
Korea Solution Day



Japan Solution Day

Marketing Presence

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2013 KOBA Show in Korea



Blackmagic Roadshow in Japan



NAB Show in Las Vegas



Intel Storage Forum in Taipei



Intel IDF in Beijing

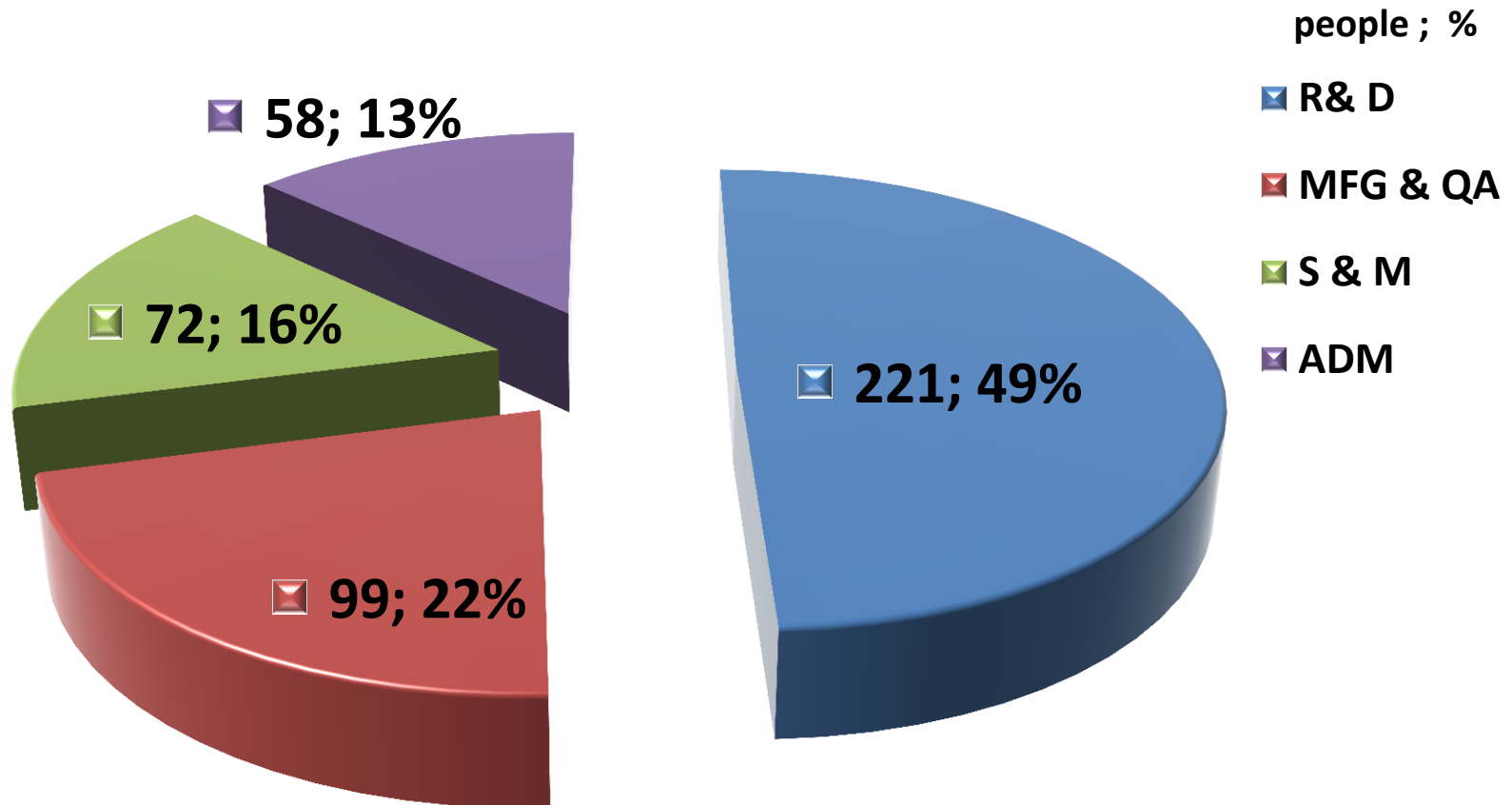


Adobe Road Show

Thank You!

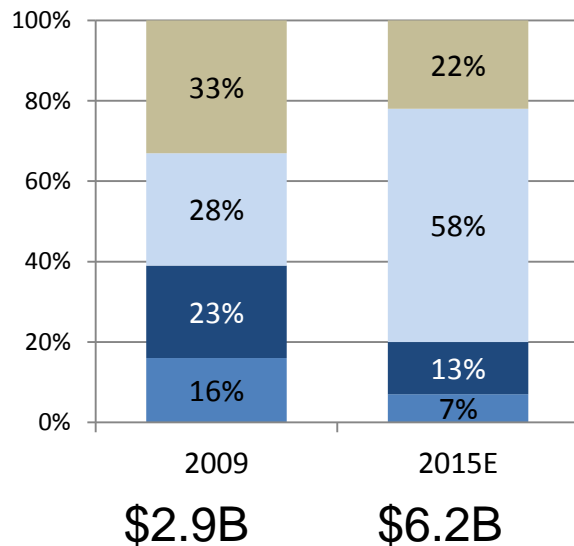
Our People - Technology Focused Team

Global total 450+

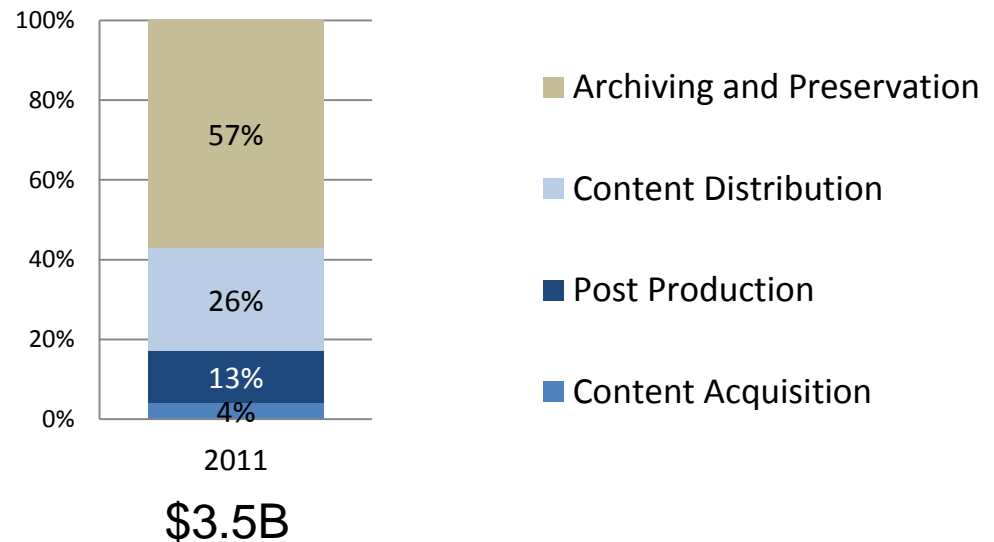


New growth engine in Rich Media

2010 Forecast - M&E Storage Rev Share



2012 Forecast - M&E Storage Rev Share



Key Drivers:

- *Increasing usage of higher resolution formats such as 4K and stereoscopic (3D) imaging*
- *Conversion from existing analog tape/reels to digital*

Global Technical Support

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Europe

Support 0800-0227-484
Escalations: Promise EMEA FAE
RMA replacements : EMEA Hub
Promise ServicePlus available

China

10-88578085 x 815
Escalations: Promise Beijing FAE
RMA replacements : Beijing Hub
Escalations: Promise Japan FAE
RMA replacements : Taiwan Hub
Promise ServicePlus CQ309

Japan

4143-2836

Escalations: Promise Japan FAE
RMA replacements : Taiwan Hub
Promise ServicePlus CQ309

USA/ Canada

18008880245 x8 24x7x365
14082281400 x8 24x7x365
Escalations: Promise USA FAE
RMA replacements: USA Hub
Promise ServicePlus available

APAC

India

Taiwan+886 3578-0300
Escalations: India FAE
RMA replacements : India Hub
Escalations: Promise Taiwan FAE
RMA replacements : Taiwan Hub
Promise ServicePlus CQ309
Promise ServicePlus CQ209

Australia/NZ

+14082281400
Escalations: Promise Taiwan FAE
Australia FAE in CQ109
RMA replacements : Taiwan Hub
Australia Hub CQ209
Promise ServicePlus CQ209

All others

+14082281400
Escalations: Promise Taiwan FAE
RMA replacements: closest regional Hub
Promise ServicePlus TBD

Technical support is available in local languages in certain countries only and only in English for USA 24x7 line
All regional support lines will default to USA 24x7x365 toll line if received after local hours 9am-5pm weekdays