



# Promise introduction

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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TECHNOLOGY, INC.

  PROMISE OFFICE

**PROMISE EMEA**  
*PROMISE Netherlands*



- ✓ Sales and Marketing
- ✓ Technology support
- ✓ Logistics
- ✓ After service

**PROMISE China**



**PROMISE Taiwan**



- ✓ Sales and Marketing
- ✓ R&D
- ✓ Technology support
- ✓ Logistics
- ✓ After service

**PROMISE USA**



- ✓ Sales and Marketing
- ✓ R&D
- ✓ Technology support
- ✓ Logistics
- ✓ After service

- ✓ Sales and Marketing
- ✓ R&D
- ✓ Technology support
- ✓ Manufacturing & Logistics
- ✓ After service

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

# Snapshot of Promise

- IDC 2013 Q1-Q3 ECB: \$ 17.5B. (Growth rate : - 1.68%)
- Gain share (13.26% > -1.68%)
- Characteristics :
  - High Margin: 42.1% (entry barrier), RD/Rev. 15~17% > 6%~8%
  - Promise brand v.s. ODM: 45% v.s. 55%
  - 80%+ rev. from US & EMEA, WW brand, S&M, channel & service

Vendor	2013 Q1-Q3 Rev.	2012 Q1-Q3 Rev.	2013 Q1-Q3 M/S	2013 Q1-Q3 YOY
EMC	5,385	5,314.44	30.71%	1.33%
NetApp	2,405	2,266.02	13.72%	6.13%
IBM	2,036	2,134.16	11.61%	-4.61%
Hitachi	1,417	1,813.52	8.08%	-21.86%
HP	1,634	1,539.04	9.32%	6.14%
Promise	89	78.96	0.51%	13.26%
Total	17,535	17,835.12	100.00%	-1.68%

# 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
<b>9</b>	<b>Promise</b>	<b>12,717</b>	<b>3.6</b>
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
<b>4</b>	<b>Promise</b>	<b>10,007</b>	<b>4.9</b>
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
<b>10</b>	<b>Promise</b>	<b>40.6</b>	<b>2.1</b>

Source: Gartner

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

Publish Date: 2011/04

# Worldwide customers and Partners

**PROMISE**  
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**Microsoft**



**acer**

**AMD**

**ASUS**



**PMC**  
PMC-SIERRA

**SONY**

**TOSHIBA**  
Leading Innovation >>>

**HITACHI**  
Inspire the Next



**Western Digital**

**FUJITSU**

**SUPERMICRO**

**NEC**

**Kodak**



**wistron**



**TYAN**



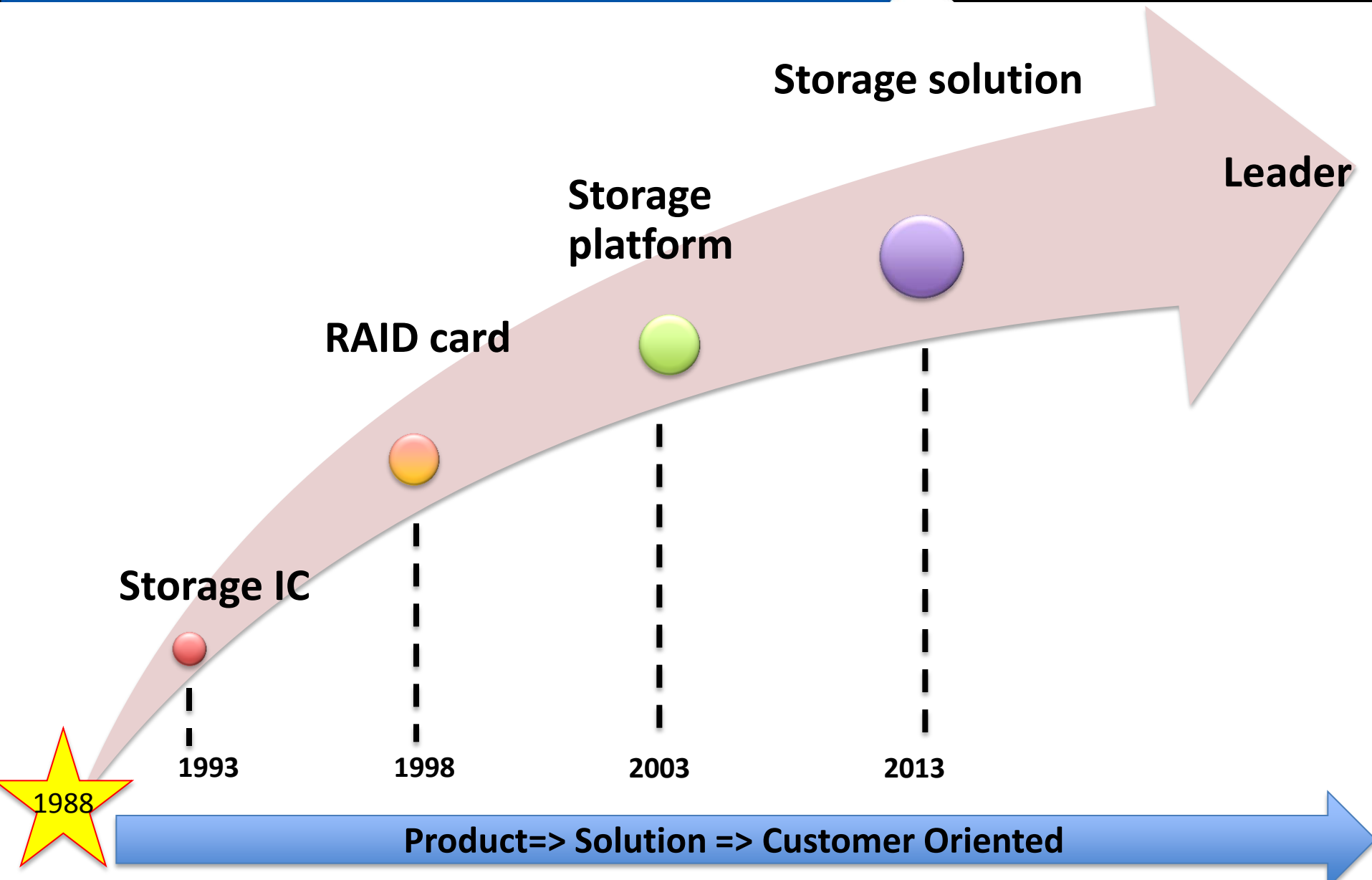
**lenovo** 联想

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



# Positioning

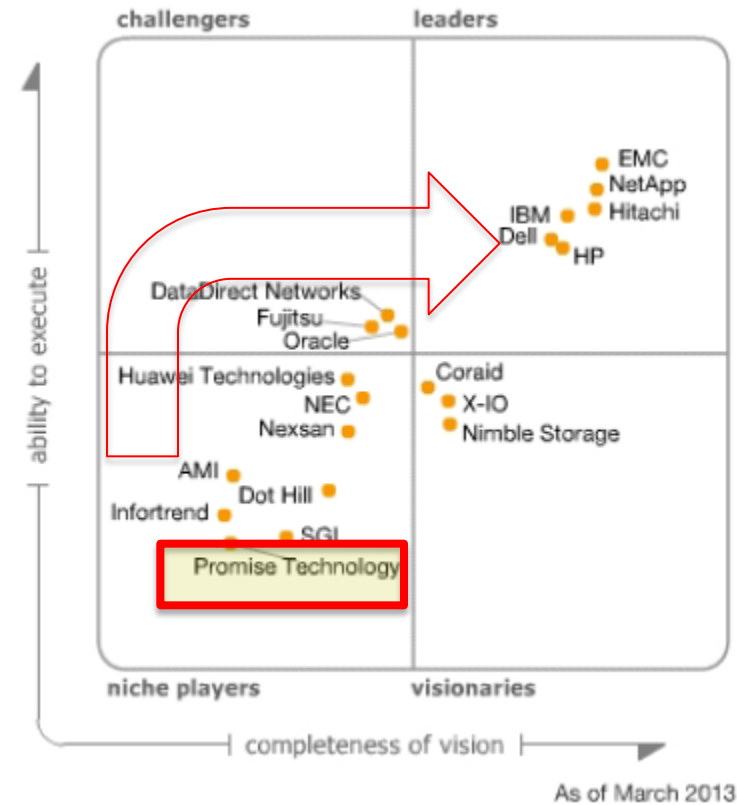
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TECHNOLOGY, INC.



# 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



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**



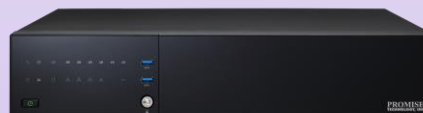
**Markets for Private Cloud**

- 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



SANLink



Pegasus R4/R6



Pegasus J4 & Pegasus J2



# Marketing Presence

**PROMISE<sup>®</sup>**  
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2013 CeBIT in Hannover Germany



Computex 2013 in Taipei Taiwan

# Marketing Presence

**PROMISE**<sup>®</sup>  
TECHNOLOGY, INC.



2013 NAB Show in Las Vegas



IFSEC 2013 in Birmingham, UK

# Marketing Presence

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ISC West/ USA



IFSEC/UK



NAB/ USA



Taiwan Solution Day



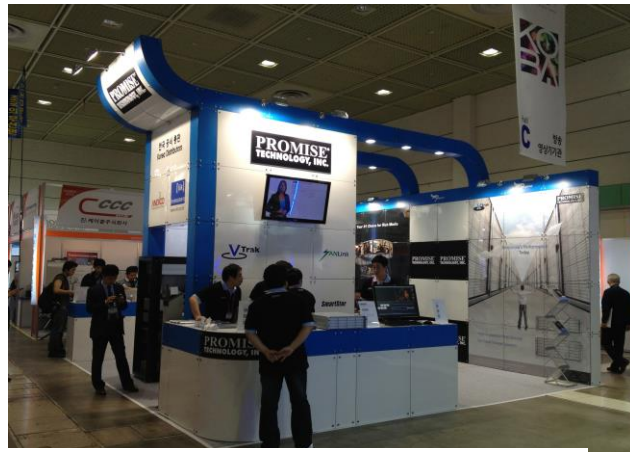
Korea Solution Day



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

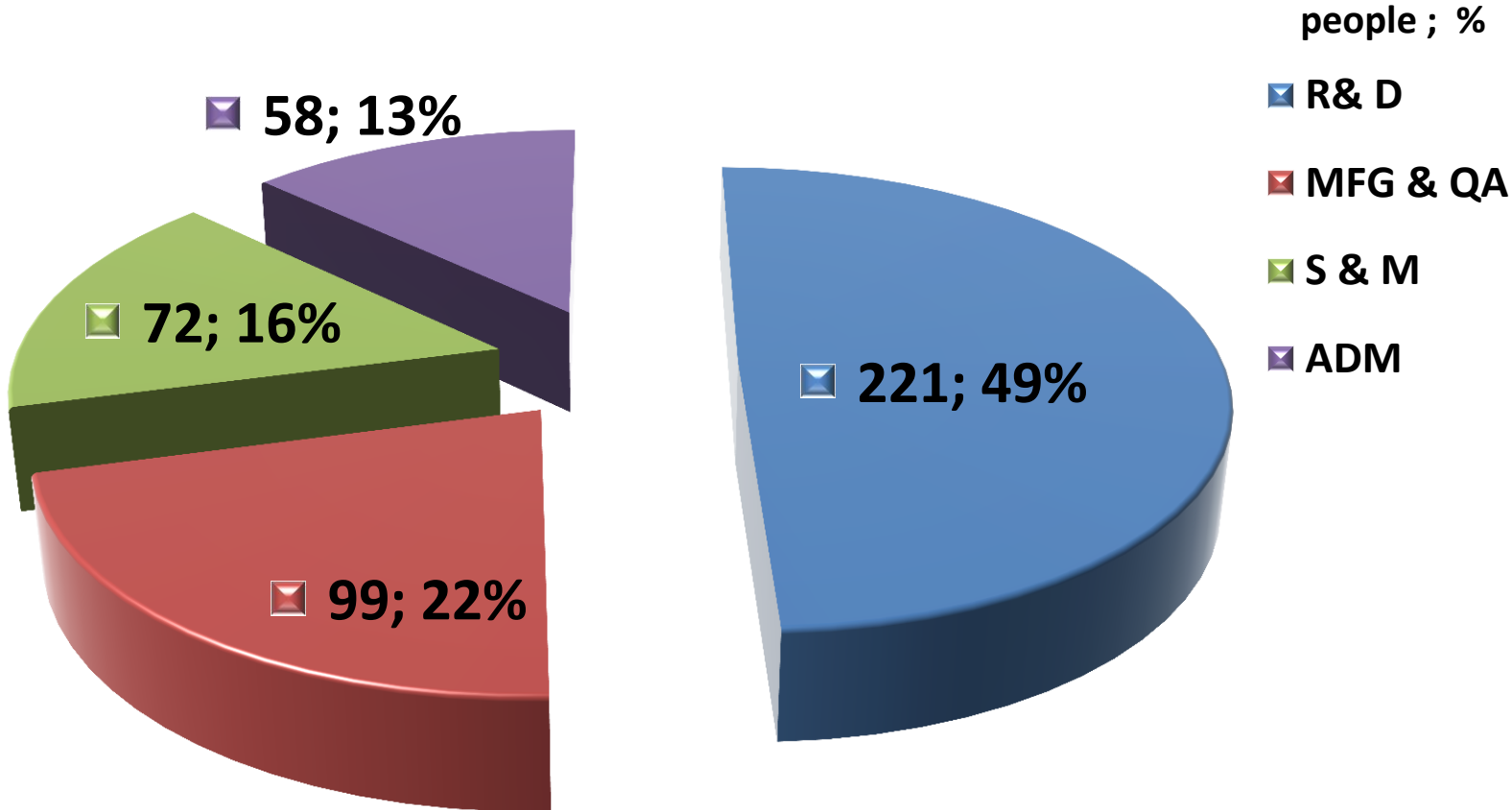


Thank You!

# Our People - Technology Focused Team

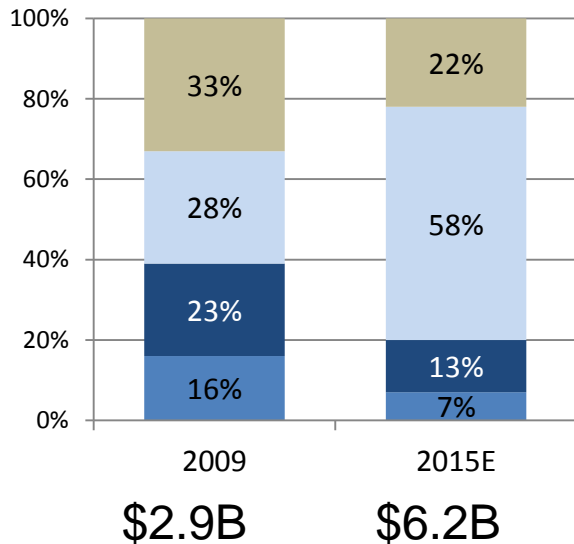


Global total 450+

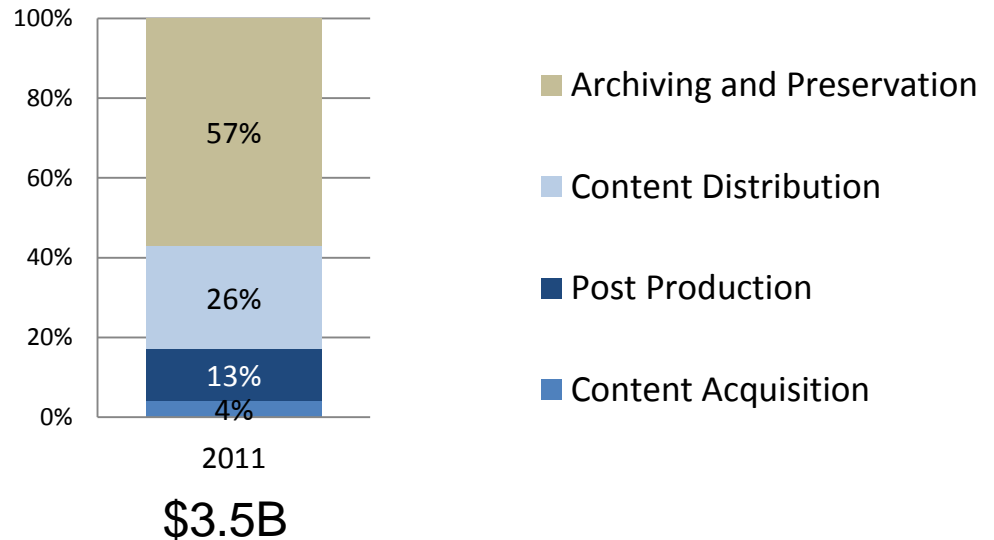


# New growth engine in Rich Media

## 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

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

## 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