Symantec™

THE
YELLOW
BOOK

EMEA FY17 PLANNING

WHY SYMANTEC?

Symantec is a global leader in cyber security, helping customers secure and manage their IT-driven worlds against more risks, at more points, more completely and more efficiently than any other company.

EMEA FY17 **Executive summary**

» Continued cloud adoption is underpinning the growth of security as a managed service. Cloud is increasingly relied on to deliver agile, scalable and elastic solutions.

» 'Cyber risk' is prevalent, fuelling demand for advanced threat protection. Ransomware, malware and companies' vulnerabilities are all on the increase, while spear-phishing has become ever more targeted.

» The shift toward spending on outsourcing services will increase over the next four years, leading to a reshaping of global security budgeting.

» Symantec's strategy is built on our unique strengths in Threat Protection, Information Protection, Analytics/ Security Ops and Managing & Compliance Solutions.

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solution offerings**

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Glossary

FY17 MARKET TRENDS

EMEA TOP EUROPEAN SECURITY TRENDS

An at-a-glance guide to the three key security trends across the EMEA region,
and their implications for both buyers and providers:

DYNAMIC THREAT LANDSCAPE
TECHNOLOGY-LED

Requires automation, integration and visibility

✓ Positions security as **a (cloud) service**

DIGITAL TRANSFORMATION
BUSINESS-LED

Requires innovation to support new platforms

✓ Positions security as **an enabler**

REGULATORY UPHEAVAL
COMPLIANCE-LED

Requires forensic and continuous audit capability

✓ Positions security as **risk mitigation**

Source: IDC, European Next-Generation Security: Top Trends and Implications for Buyers and Providers, # EMEA40882416, December 2015

EMEA EXPECTED GROWTH

The EMEA region is expected to show 2.3% 5Yr CAGR growth 2015-2020, with the UK, Germany and France remaining the largest markets and accounting for 48% of IT spend in 2016.

Key Trends

EMEA IT spending is expected to show a -0.4% decline in 2016, yet is expected to show **2.3% 5Yr CAGR growth 2015-2020.**[1]

48%   **UK, Germany and France remain the largest markets for IT spending in 2016, accounting for 48% of EMEA IT spend.** In 2016, the UK is expected to show a -4.1% decline, with Germany and France growing at 1.5%. 5Yr CAGR (2015- 2020) Growth is expected to be 2.6% in Germany and 1.5% in the UK and France.[1]

The rest of Eastern Europe is expected to show the highest growth in 2016 at 10.1%, followed by Czech Republic at 6.9%. **Israel is expected to show the highest IT spending growth in terms of 5Yr CAGR at 6.1%**, followed by Saudi Arabia at 5.2%.[1]
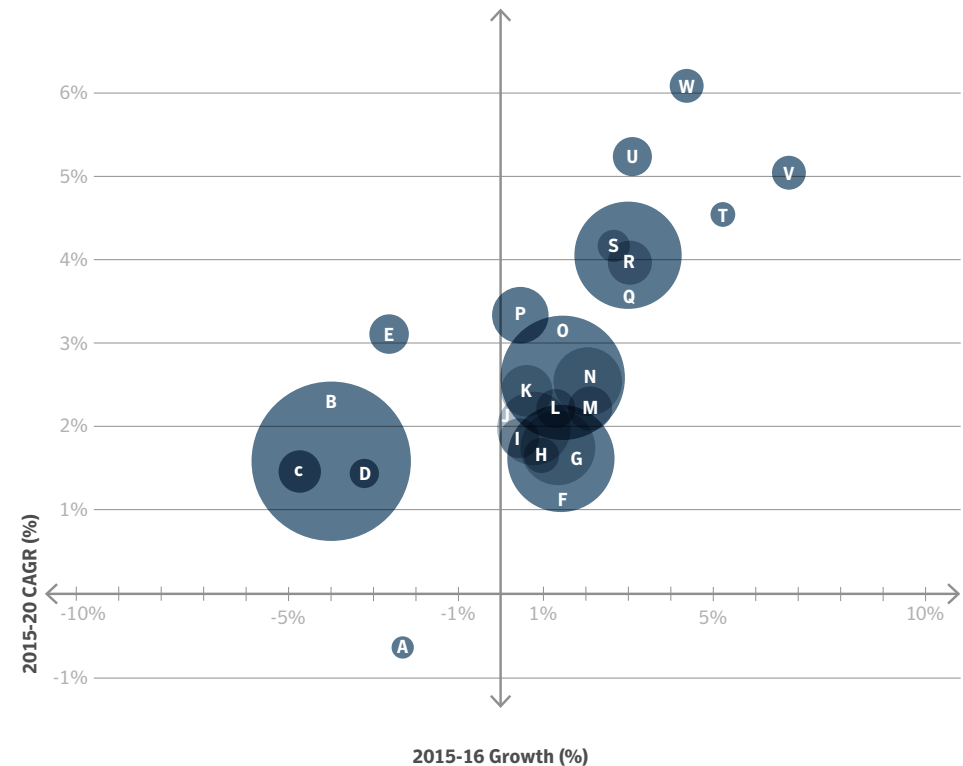
South Africa is expected to show significant decline in IT spend in 2015-2016 at 14.9%, yet 5Yr CAGR Growth is projected at 1.5%. **Russia is also expected to show a steep decline in IT spend in 2015-2016 at 14.6%**, and 5Yr CAGR is expected to be -0.6%.[1]

Growth in IT Spending 2015-2020

Key:

A Greece
B United Kingdom
C Norway
D Portugal
E Turkey
F France
G Italy
H Austria
I Finland
J Spain
K Sweden
L Belgium
M Denmark
N Netherlands
O Germany
P Switzerland
Q Rest of EMEA
R Poland
S Ireland
T Hungary
U Saudi Arabia
V Czech Republic
W Israel

The bubble size represents market size in $M

2015-20 CAGR (%)

2015-16 Growth (%)

IT SPEND

IT spend will likely be driven by growth in Software and IT Services. The majority of this spend will be by the UK, Germany and France – but Brexit will have an impact.

Key Trends

In EMEA, Software spending is expected to show the highest growth in 2016 at 3.9%, followed IT Services and Data Center Systems at 1.0%.[1]

Spending on **Software and IT Services is expected to accelerate during 2015-2020**. Software spend is expected to grow at 6.2% 5Yr CAGR and IT Services at 3.8% 5Yr CAGR.[1]
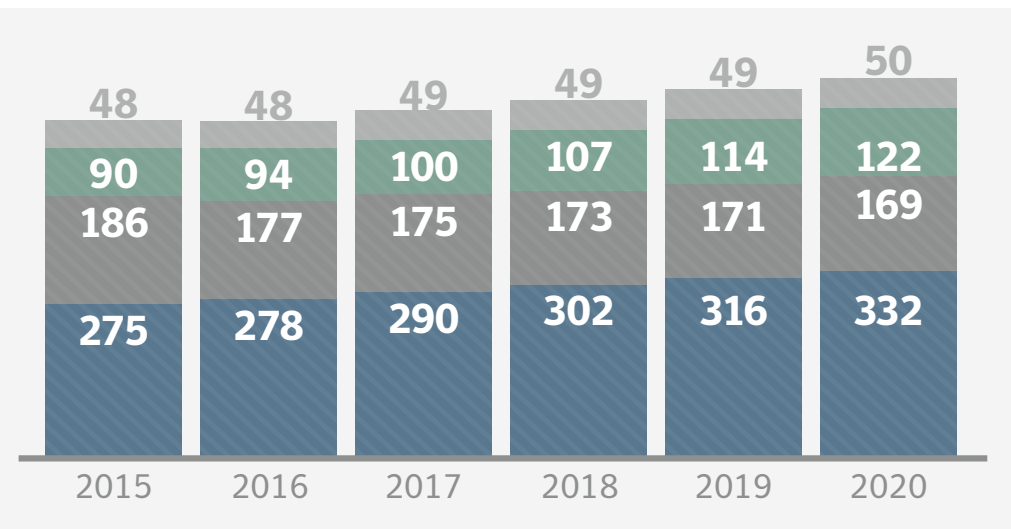
56% **UK, Germany and France account for 56% of IT Services spend and 51% of Software spend in 2016.**[1]

With the UK's exit from the EU, and a tremendous amount of political volatility, business confidence erosion and price increases, there will be an **impact on the UK, Western Europe and worldwide IT spending. UK IT spending growth will certainly be negative in 2016.**[2]

EMEA IT Spending ($B)

	2015	2016	2017	2018	2019	2020
Data Center Systems	48	48	49	49	49	50
Software	90	94	100	107	114	122
Devices	186	177	175	173	171	169
IT Services	275	278	290	302	316	332

Key:

Data Center Systems: **0.9%** EMEA CAGR (2015-20)   Devices: **-1.9%** EMEA CAGR (2015-20)

Software: **6.2%** EMEA CAGR (2015-20)   IT Services: **3.8%** EMEA CAGR (2015-20)

Sources: 1 Gartner, Inc. Market Databook, 2Q16 Update, #296772, Analysts: Kenneth Newbury, Steve Cramoysan (Telecom), Kathryn Hale (IT Services), Adrian O'Connell (Data Center), Colleen Graham (Software), George Shiffler III (Economics) and Ranjit Atwal (Client Devices), June 2016. **2** Smarter with Gartner Inc. Understand the Brexit Impact on IT, Contributor: Heather Pemberton Levy, 24 June 2016, http://www.gartner.com/smarterwithgartner/understand-the-brexit-impact-on-it/

Charts/graphics created by Symantec based on Gartner research. Source: Gartner, Inc. Market Databook, 2Q16 Update, #296772, Analysts: Kenneth Newbury, Steve Cramoysan (Telecom), Kathryn Hale (IT Services), Adrian O'Connell (Data Center), Colleen Graham (Software), George Shiffler III (Economics) and Ranjit Atwal (Client Devices), June 2016

SOFTWARE SPENDING

Software spending will be driven by investments to improve overall business processes.
Most enterprise software buyers today are looking to gain enhanced intelligence as well as greater speed.

Key Trends

7.9% **In EMEA, Enterprise Application Software spending is expected to grow by 7.9%** respectively through 2015-2020, significantly faster than Infrastructure Software spend at 4.5% over the same period, according to Gartner.[1]
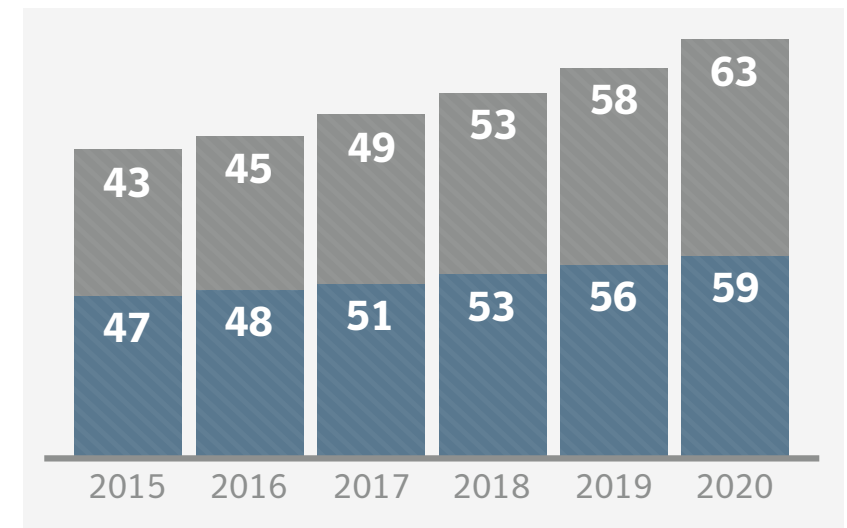
Greater intelligence and more speed are high on the priority list of enterprise software buyers today. Of the many dynamics driving cloud computing and enterprise software predictions today, the need for gaining greater insights into corporate-wide performance and the challenges organizations face in keeping pace with customer-driven change in core markets, dominate.[2]

Cloud platforms are an accelerating catalyst of new app development and are proving their value daily by scaling securely to meet enterprises' complex information and intelligence needs.[2]

EMEA Software IT Spending ($B)

Year	2015	2016	2017	2018	2019	2020
Enterprise Application Software	43	45	49	53	58	63
Infrastructure Software	47	48	51	53	56	59

Key:

■ Enterprise Application Software: **7.9%** EMEA CAGR (2015-20)

■ Infrastructure Software: **4.5%** EMEA CAGR (2015-20)

Sources: 1 Gartner, Inc. Market Databook, 2Q16 Update, #296772, Analysts: Kenneth Newbury, Steve Cramoysan (Telecom), Kathryn Hale (IT Services), Adrian O'Connell (Data Center), Colleen Graham (Software), George Shiffler III (Economics) and Ranjit Atwal (Client Devices), June 2016 **2** Forbes

Charts/graphics created by Symantec based on Gartner research. Source: Gartner, Inc. Market Databook, 2Q16 Update, #296772, Analysts: Kenneth Newbury, Steve Cramoysan (Telecom), Kathryn Hale (IT Services), Adrian O'Connell (Data Center), Colleen Graham (Software), George Shiffler III (Economics) and Ranjit Atwal (Client Devices), June 2016

BUSINESS IT SERVICES SPENDING

Business IT Services spending growth is being influenced by increasing demand for consulting Services, with 'cyber risk' driving proactive management of security.

Key Trends

Worldwide, spending in the IT Services market is expected to return to growth in 2016, following a decline of 4.5% in 2015. IT Services spending is projected to reach $940 billion in 2016, up 3.1% from 2015. This is due to **accelerating momentum in cloud infrastructure adoption and buyer acceptance of the cloud model.**[1]

In EMEA, the IT Services market is also expected to show flat growth in 2016. Business IT Services spending is projected to reach $252million, accounting for 91% of IT Services spending in 2016; returning to growth at 1.5% in 2016 and expected to show 4.3% CAGR 2015-2020.[2]
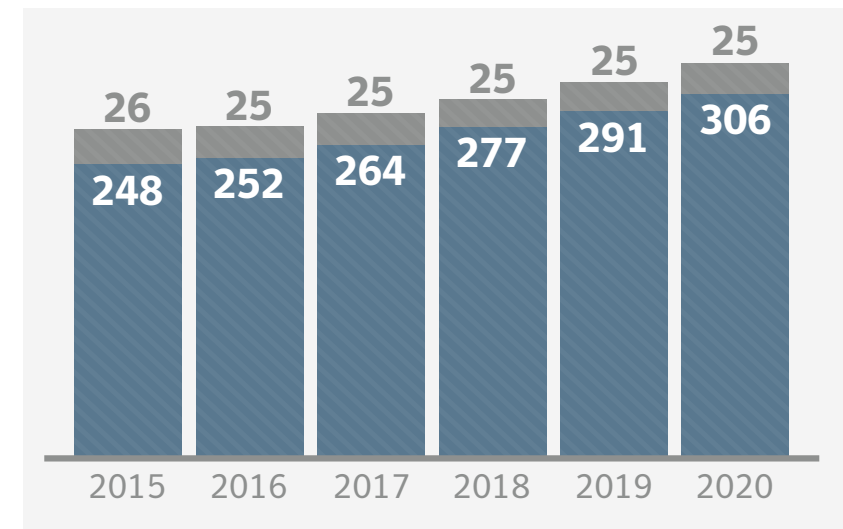
New offerings will spin out quickly especially from the new middle space, which the market calls 'cyber risk'. Cyber risk morphs enterprise risk management and security consulting services, driven by the need to view security more as a risk to be proactively managed rather than an isolated activity driven by compliance needs or the resolution of previous security incidents.[3]

The shift toward spending on outsourcing services will increase over the next four years, which will characterize a reshaping of global security budgeting.[4]

EMEA Services IT Spending ($B)

Year	IT Product Support	Business IT Services
2015	26	248
2016	25	252
2017	25	264
2018	25	277
2019	25	291
2020	25	306

Key:

IT Product Support: **-0.8%** EMEA CAGR (2015-20)

Business IT Services: **4.3%** EMEA CAGR (2015-20)

Sources: 1 Gartner Press Reelase, Gartner Says Worldwide IT Spending is Forecast to Grow 0.6 Percent in 2016, January 18, 2016, http://www.gartner.com/newsroom/id/3186517; **2**Gartner, Inc. Market Databook, 2Q16 Update, #296772, Analysts: Kenneth Newbury, Steve Cramoysan (Telecom), Kathryn Hale (IT Services), Adrian O'Connell (Data Center), Colleen Graham (Software), George Shiffler III (Economics) and Ranjit Atwal (Client Devices), June 2016 **3**Gartner, Inc. Gartner Market Guide for Security Consulting Services, Worldwide , G00271917, Analysts: Jacqueline Heng | Julie Short, 24 August 2015 **4**Gartner, Inc. Predicts 2016: Security Solutions, G00272748, Analysts: Ruggero Contu, Deborah Kish, Perry Carpenter, Sid Deshpande , Lawrence Pingree

Charts/graphics created by Symantec based on Gartner research. Source: Gartner, Inc. Market Databook, 2Q16 Update, #296772, Analysts: Kenneth Newbury, Steve Cramoysan (Telecom), Kathryn Hale (IT Services), Adrian O'Connell (Data Center), Colleen Graham (Software), George Shiffler III (Economics) and Ranjit Atwal (Client Devices), June 2016

CLOUD SPENDING

Cloud adoption accelerates as IT departments embrace cloud to cut cost, scale resources, remain competitive and stay ahead of the dynamic threat landscape.

Key Trends

As its technologies and processes mature, **the cloud is being increasingly relied on as a vehicle for agile, scalable and elastic solutions. To build competitive advantage and cut costs**, CIOs and other IT leaders need to constantly adapt their strategies to leverage cloud capabilities.[1]

30% Gartner predicts by 2019, over **30% of the 100 largest vendors' new software investments will have shifted from cloud-first to cloud-only.**[1]

By 2018, 50% of the applications running in public cloud environments will be considered mission-critical by the organizations that use them.[1]

More leading-edge IT capabilities will be available only in the cloud, forcing reluctant organizations closer to cloud adoption. While some applications and data will remain locked on-premises in older technologies, more new solutions will be cloud-based, thus further increasing demand for integration infrastructure.[1]

EMEA Cloud IT Spending ($B)
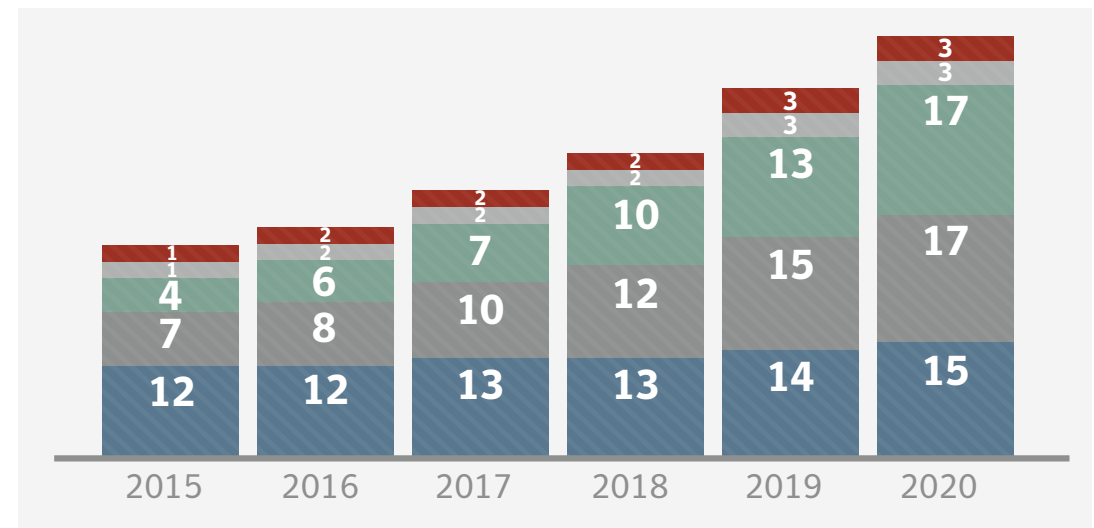
Key:

Cloud Application Infrastructure Services: **16.3%** EMEA CAGR (2015-20)

Cloud Management & Security Services: **17.9%** EMEA CAGR (2015-20)

Cloud System Infrastructure Services: **32%** EMEA CAGR (2015-20)

Cloud Application Services: **19.5%** EMEA CAGR (2015-20)

Cloud Business Process Services: **4.2%** EMEA CAGR (2015-20)

Sources: 1Gartner, Inc. Predicts 2016: Gartner Cloud Computing to Drive Digital Business, G00292047, Analysts: David Mitchell Smith, Ed Anderson, Yefim V. Natis Jay Heiser, Thomas J. Bittman, Douglas Toombs, David W. Cearley, Jeffrey Mann, Neville Cannon, Gregor Petri – December 2015

Charts/graphics created by Symantec based on Gartner research. Source: Gartner, Inc. Forecast: Public Cloud Services End-Worldwide, 2014-2020, 2Q16 Update, Analysts: By Sid Nag, Lai-Ling Lam, Yanna Dharmasthira, Chad Eschinger, Cathy Tornbohm, Bianca Francesca Granetto, Gianluca Tramacere, Dean Blackmore, Joanne M. Correia, Laurie F. Wurster, Tom Eid, Ruggero Contu, Fabrizio Biscotti, Chris Pang, TJ Singh, Hai Hong Swinehart, Gregor Petri, Jim Hare, Bhavish Sood, Robert Anderson, Nigel Montgomery, Mike Dominy, Alys Woodward, JP Corriveau, Rajesh Kandaswamy, Fred Ng, June 2016

IOT ADOPTION

IoT adoption is growing significantly across EMEA, but the use cases across the region will differ – understanding industry-specific business drivers and barriers will be key.

Key Trends

Over 23% IDC has estimated global IoT revenue from hardware, software, connectivity, and support for IoT to expand from $699 billion in 2015 to $1.3 trillion by 2019. **In 2016, EMEA IoT revenue is expected to reach $162billion, growing at 23.9% CAGR 2014-2019**.[1]

Germany is leading the global IoT trend, especially in its manufacturing and automotive industry. **France aims to become a leader in IoT**. Cité de l'Objet Connecté, a center dedicated to IoT technology, funded by private and state money, was inaugurated in Angers by President Francois Hollande in June 2015.[1]

MEA IoT adoption is expected to increase rapidly. The region is focused on sustainable economies and safety and security issues. The IoT is making its presence felt in South Africa by addressing a host of issues around security, water control, energy, health monitoring and medication, mining and traffic congestion, etc.[1]

In Western, Central and Eastern Europe, government mandates are visibly going hand in hand with a more openly eco-consciousness culture supported by regulations.[1]

EMEA IoT Top 3 Use Cases by Spend and Growth[1]

EMEA Top 3 IoT Use Cases Spending in 2015 ($B)

Use Case	Value
Manufacturing Operations	14
Freight Monitoring	13
Smart Grid (Electricity)	10
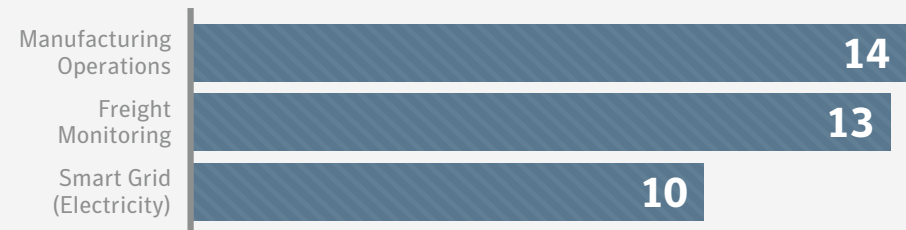
EMEA Top 3 IoT Use Cases by Growth (2015-2016)

Use Case	Value
Smart Appliances	54.3%
Connected Vehicles	51.4%
NFC Payment/Shopping	47.8%
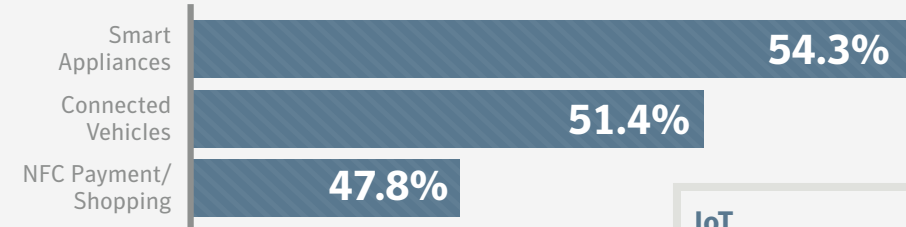
IoT
$162B 2016 revenue
23.9% EMEA CAGR (2014-19)

CYBER SECURITY

With advanced threats increasing, detection and response capabilities are critical to limiting companies' exposure to cyber risk.

Key Trends

Spear-phishing campaigns have become stealthier, targeting fewer individuals within a smaller number of select organizations.[1]

Although Android users remain the main target, 2015 saw effective attacks on Apple devices as well, including those that were not jail-broken.[1]

85% **Companies choosing not to report the number of records lost in a data breach increased by 85%**, shielding the true impact on exposed identities.[1]

x2 **Web attacks doubled in 2015,** fed by the ease of use and wide availability of web attack toolkits.[1]

In 2015, Worldwide Symantec Observed:

Malware is exploding

430million new malware variants created

16% of malware detects virtual environments

Vulnerabilities are increasing

54 zero-day vulnerabilities discovered

19 days total exposure time to top 5 zero-days

Breaches are larger than ever

9 breaches with 10million+ identities exposed

429million total identities exposed

Spear-phishing is more targeted

46 emails per day

43% target small businesses

Significant changes in 2015

+36% Malware variants

+35% Ransomware

+125% Zero-day vulnerabilities

+77% Android malware variants

+117% Web attacks blocked per day

+55% Spear-phishing targeting employees

SECURITY-AS-A-SERVICE SOLUTIONS

Worldwide, Security-as-a-Service solutions are predicted to account for 33%
of all security spend by 2018, with cost and skilled resources driving adoption.

Key Trends

Key market drivers include the **transition to the Public Cloud, the reduction of Capex, and operational improvement.**[1]

Additionally, cost considerations and complexity; the difficulty of attracting, hiring and retaining security professionals; the dynamic threat landscape; and the evolving role of the CISO are **increasing the adoption of SaaS security services.**[1]

15% IDC predicts that enterprises will use cloud-hosted enterprise security services solutions for **15% of their security spend by the end of 2015 and 33% will be delivered via SaaS by 2018.**[1]

IDC predicts that over time, many existing on-premises security solutions will transition to a cloud-based delivery model and be extended to provide protection across an organizations entire global footprint.[1]

WW Security-as-a-Service 2014-2019 CAGR

Category	CAGR
Security & Vulnerability Management	17.2%
Identity & Access Management	14.3%
Endpoint Security	11.3%
Web Security	10.7%
Network Security	9.2%
Other Security Software	3.2%
Messaging Security	2.4%
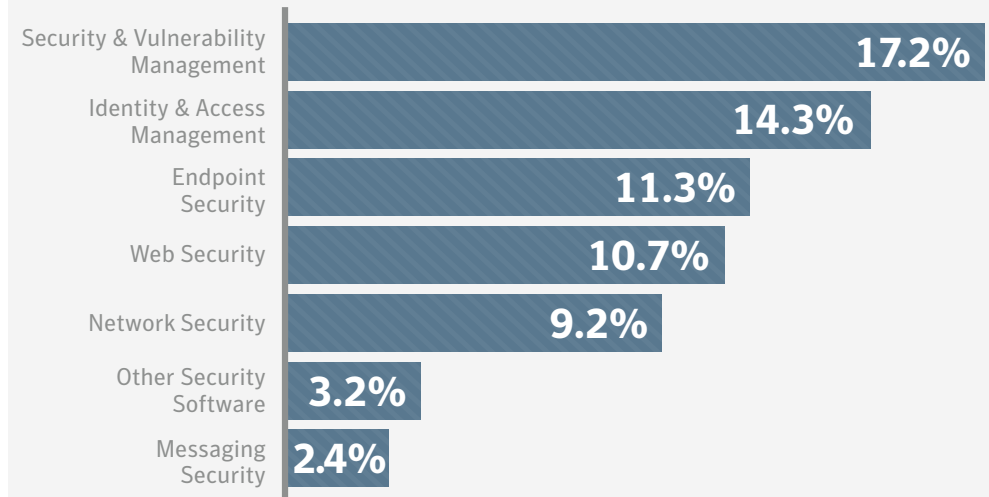
WHAT OUR CUSTOMERS ARE FACED WITH TODAY
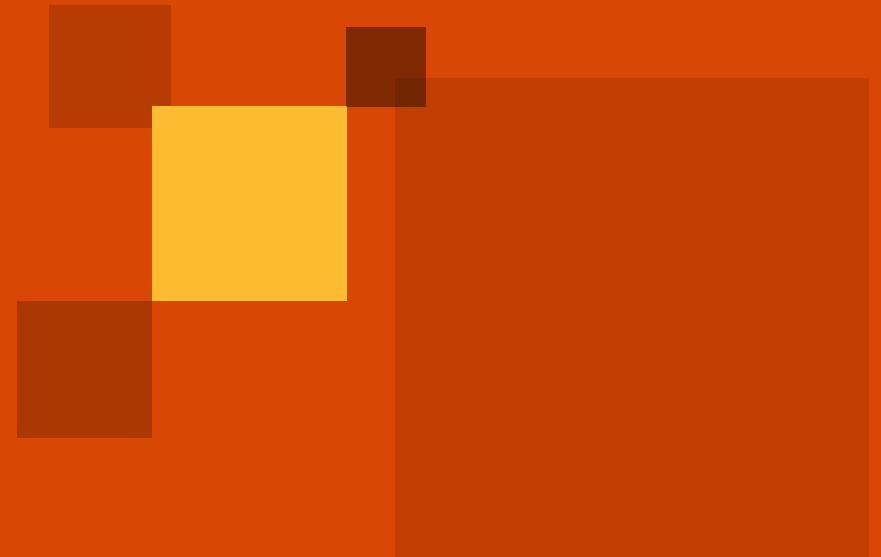
HOW CAN WE HELP?

Cyber attacks are increasingly sophisticated and companies are increasingly at risk. With mobile workloads and limited resources, we can offer the expertise required to achieve a higher level of security.

CUSTOMER CHALLENGES:

I'm not ready for tomorrow's threats

» Advanced attacks are lost in a mass of less important alerts

» Average attack goes undetected for 170 days

» Just 31% of breaches are found by the victim organization – the rest are found by a third party, law enforcement, etc.

My data is mobile and moving to the cloud

» With 65% of workloads in the cloud (Amazon Web Services, Salesforce, Box, Office 365), more of your data is at risk

» Data is increasingly accessed from outside your firewall

I need to reassure my online customers

» My customers don't know if they can trust my website

» I don't have visibility into attacks on my brand

I never have enough time or resources

» Organizations don't know how they are doing or where to focus – 96% of alerts are never reviewed

» It's hard to hire the right security talent

It's hard to achieve a higher level of security.

HOW WE CAN HELP:

STAY AHEAD OF TOMORROW'S THREATS

THREAT PROTECTION

Block, detect and quickly respond to the most advanced threats.

PROTECT YOUR CRITICAL DATA WHEREVER IT LIES

INFORMATION PROTECTION

Keep your information protected while keeping your employees productive.

TAKE ONLINE TRUST TO A WHOLE NEW LEVEL

WEBSITE SECURITY

Deploy comprehensive website security for your ecommerce properties.

RELY ON EXPERTS TO WATCH OVER YOUR SECURITY

CYBER SECURITY SERVICES

Stay ahead of emerging threats by extending your team with our team, around the clock, around the world.

Achieve a higher level of security from endpoint to the cloud.

SYMANTEC STRATEGY AND SOLUTION OFFERINGS

GLOBAL LEADER **IN SECURITY**

From endpoint to the cloud, Symantec offers industry-leading security solutions to meet every requirement and provide optimum protection against every threat.

Symantec has:

Strong security franchises...   **...and unique threat visibility**
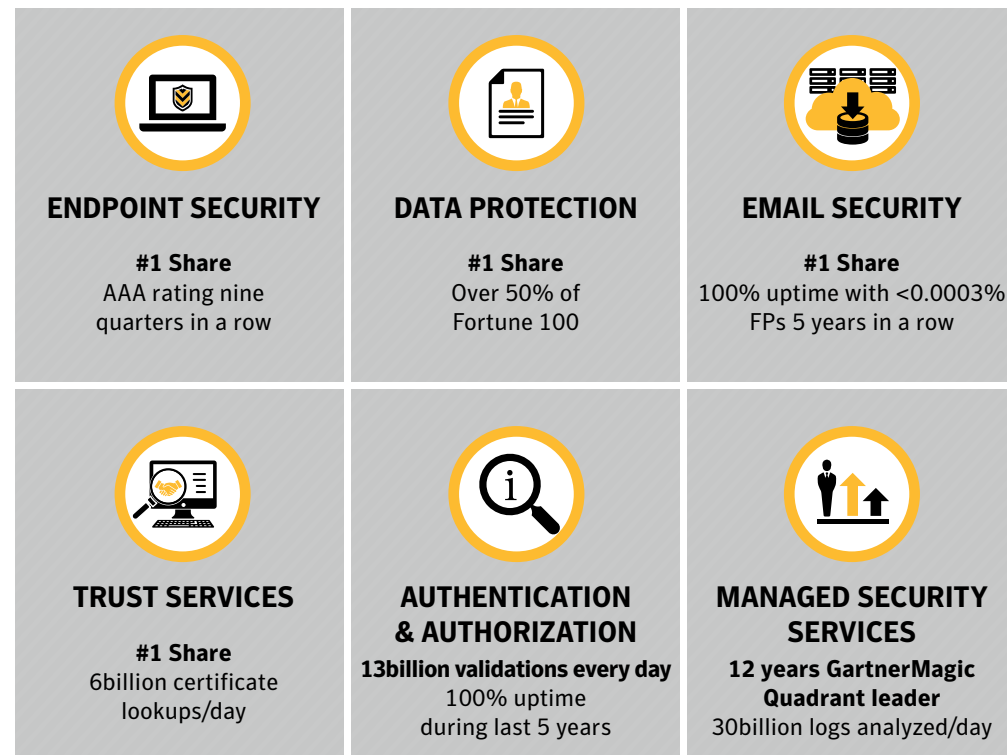
ENDPOINT SECURITY

#1 Share
AAA rating nine
quarters in a row

DATA PROTECTION

#1 Share
Over 50% of
Fortune 100

EMAIL SECURITY

#1 Share
100% uptime with <0.0003%
FPs 5 years in a row

**175 MILLION
ENDPOINTS**

57 MILLION
attack sensors
IN 157
countries

182 MILLION
web attacks
blocked last year

TRUST SERVICES

#1 Share
6billion certificate
lookups/day

AUTHENTICATION & AUTHORIZATION

13billion validations every day
100% uptime
during last 5 years

MANAGED SECURITY SERVICES

**12 years GartnerMagic
Quadrant leader**
30billion logs analyzed/day

3.7 TRILLION
rows of telemetry
100 BILLION
more per month

30% of world's enterprise
email traffic scanned/day
1.8 BILLION
web requests/day

9 threat
response centers
500+
rapid security response team

STRATEGY BUILT ON OUR STRENGTHS

From analytics through integration to orchestration, we share insights and actions across best-in-class products to provide the optimum security and protection for organizations in today's information-driven world.

THREAT PROTECTION SOLUTIONS

INFORMATION PROTECTION SOLUTIONS

ANALYTICS/ SECURITY OPS SOLUTIONS

MANAGEMENT & COMPLIANCE SOLUTIONS

CYBER EXPERTS
PARTNER ECO-SYSTEM

Analytics

Integration

Orchestration

SHARED INSIGHT AND ACTIONS ACROSS PRODUCTS

MULTI-TENANT CLOUD

SIMPLIFIED SALES PLAYS

Leverage our core strengths to simplify sales plays into five key customer conversations:

THREAT PROTECTION SOLUTIONS

INFORMATION PROTECTION SOLUTIONS

ANALYTICS/ SECURITY OPS SOLUTIONS

MANAGEMENT & COMPLIANCE SOLUTIONS

" Stay ahead of **advanced threats** "

" Take control of your **cloud infrastructure** "

" Achieve effective **management and compliance** "

" Protect your information **everywhere** "

" Extend your team with **integrated services** "
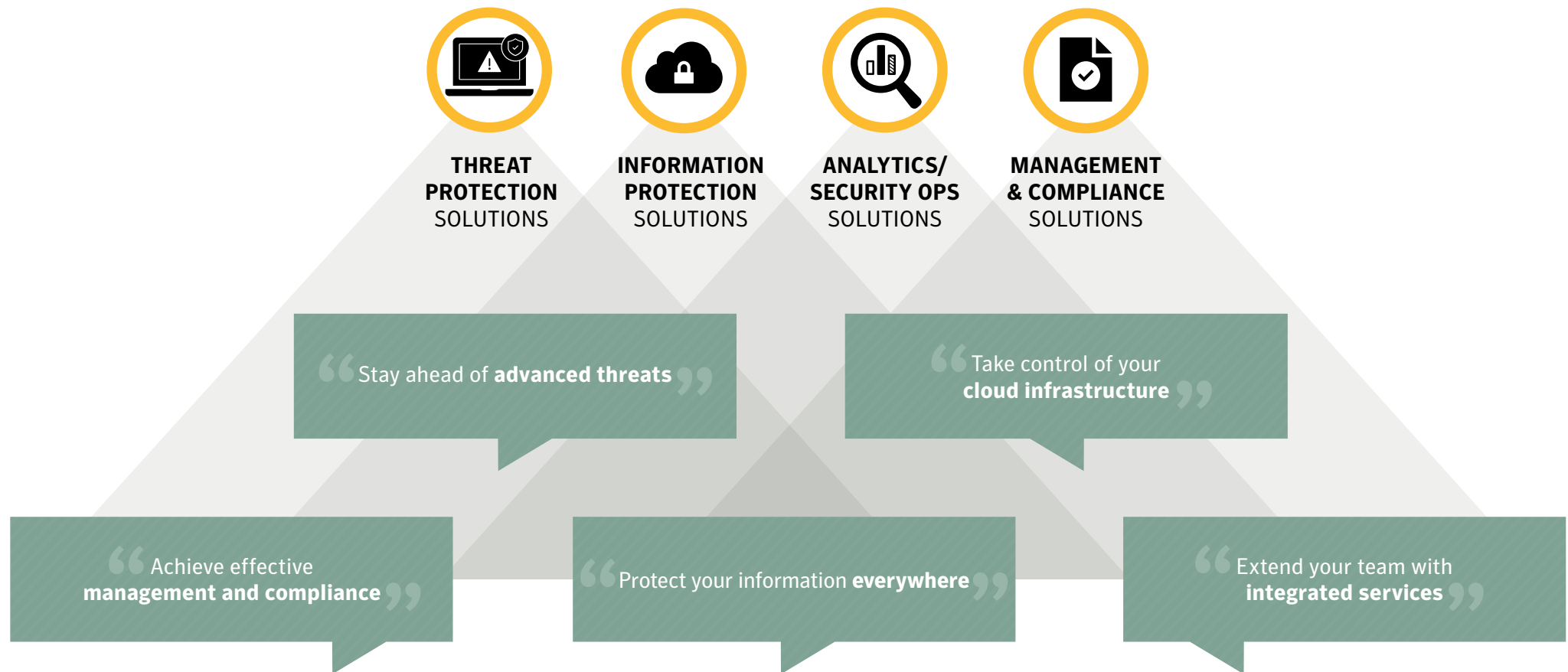
ENTERPRISE UNIFIED SECURITY STRATEGY

Our strategy centers around four key pillars: Advanced Threat Protection, Information Protection for On Premise and Cloud and Security as a Service - all anchored by a Unified Security Analytics Platform.

Users

Data

Apps

Cloud

Endpoints

Data center

Gateways

CYBER SECURITY SERVICES
Monitoring, Incident Response, Simulation, Adversary Threat Intelligence

THREAT PROTECTION

ENDPOINTS **DATA CENTER** **GATEWAYS**

» Advanced threat protection across all control points
» Built-in forensics and remediation within each control point
» Integrated protection of server workloads: on-premise, virtual, and cloud
» Cloud-based management for endpoints, data center and gateways

INFORMATION PROTECTION

DATA **IDENTITIES**

» Integrated data and identity protection
» Cloud security broker for cloud and mobile apps
» User and behavioral analytics
» Cloud-based encryption and key management

UNIFIED SECURITY ANALYTICS PLATFORM

Log and telemetry collection

Integrated threat and behavioral analysis

Unified incident management and customer hub

Inline integrations for closed-loop actionable intelligence

Regional and industry benchmarking

FY17 MARKET OPPORTUNITY

FY17 EMEA OPPORTUNITY **BY SUB-REGION**

FY17
TAM $M – FY17-FY20 CAGR
Growth Country/Territory
Existing markets only

1.566M – 9.6%
UNITED KINGDOM & IRELAND

951M – 9.9%
GERMANY

586M – 8.5%
FRANCE

6.739M – 10.7%
EMEA

1.951M – 8.5%
WESTERN EUROPE
(Belgium, Netherlands
Luxembourg, Austria, Switzerland,
Denmark, Finland, Norway,
Sweden,Italy, Spain, Portugal)

1.677M – 12%
EMERGING REGIONS
(Gulf, Saudi Arabia, South Africa,
Russia, CIS, Israel, Turkey,
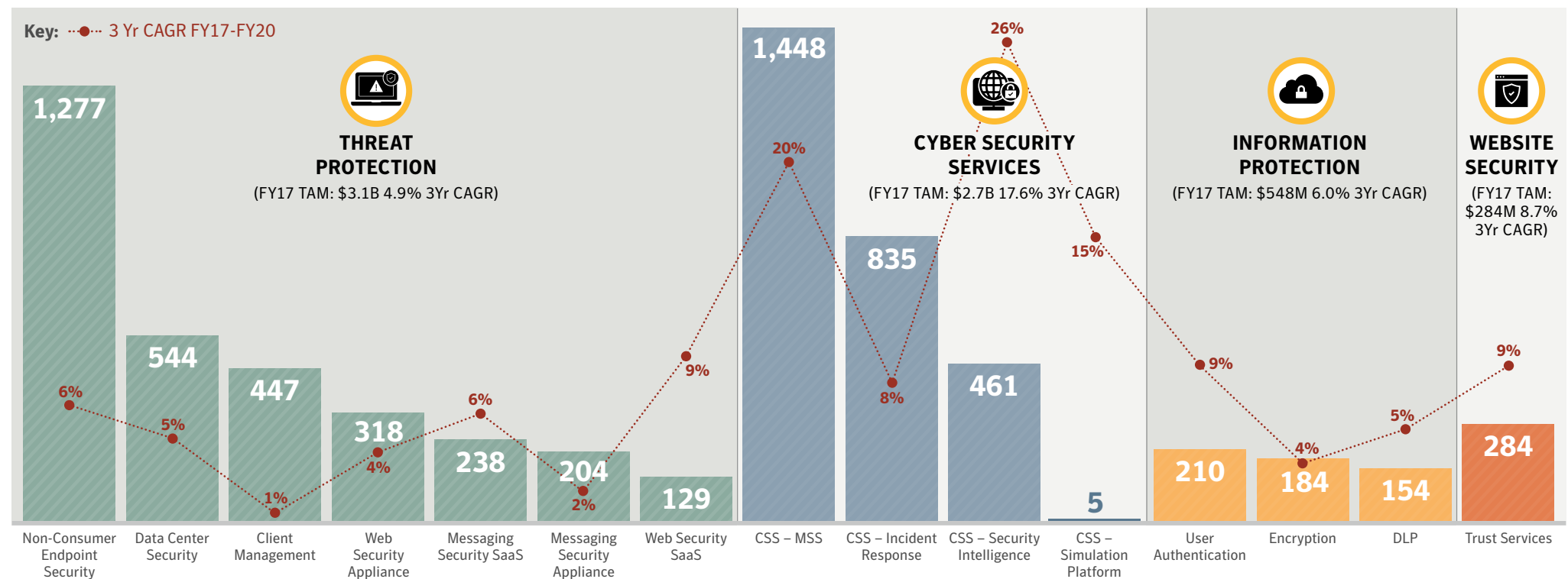Eastern Europe, Rest of Middle
East and Africa)

Source: Symantec FY17 Market Opportunity Data, CSI Business Insights & Analytics

KEY MARKET OPPORTUNITIES

Threat Protection presents the largest market opportunity in FY17 at $3.1billion, while Cyber Security Services is forecast to be the fastest growing market with 17.6% 3Yr CAGR.

Symantec Market Groups by Product Categories – TAM ($M) and 3Yr CAGR (FY17-FY20) – Existing Markets

Key: ....●.... 3 Yr CAGR FY17-FY20

THREAT PROTECTION
(FY17 TAM: $3.1B 4.9% 3Yr CAGR)

CYBER SECURITY SERVICES
(FY17 TAM: $2.7B 17.6% 3Yr CAGR)

INFORMATION PROTECTION
(FY17 TAM: $548M 6.0% 3Yr CAGR)

WEBSITE SECURITY
(FY17 TAM: $284M 8.7% 3Yr CAGR)

Category	TAM ($M)	3Yr CAGR
Non-Consumer Endpoint Security	1,277	6%
Data Center Security	544	5%
Client Management	447	1%
Web Security Appliance	318	4%
Messaging Security SaaS	238	6%
Messaging Security Appliance	204	2%
Web Security SaaS	129	9%
CSS – MSS	1,448	20%
CSS – Incident Response	835	8%
CSS – Security Intelligence	461	26%
CSS – Simulation Platform	5	15%
User Authentication	210	9%
Encryption	184	4%
DLP	154	5%
Trust Services	284	9%

Source: Symantec FY17 Market Opportunity Data, CSI Business Insights & Analytics

FY17 FORECAST SNAPSHOT

An at-a-glance guide to expected opportunities, addressable markets and predicted year-on-year growth for FY17.

18% — Cyber Security Services YoY Market Growth ($2.7billion TAM)

$1billion
IoT Security TAM
(19.5% YoY Market Growth)

$1.2billion
Non-Consumer Endpoint Security TAM
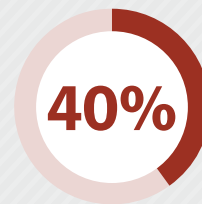(6.2% YoY Market Growth)

$1.6billion
Consumer Endpoint Security TAM
(2.3% YoY Growth)

$3.1billion
Threat Protection TAM
(4.5% YoY Growth)

$548million
Information Protection TAM
(6.1% YoY Market Growth)

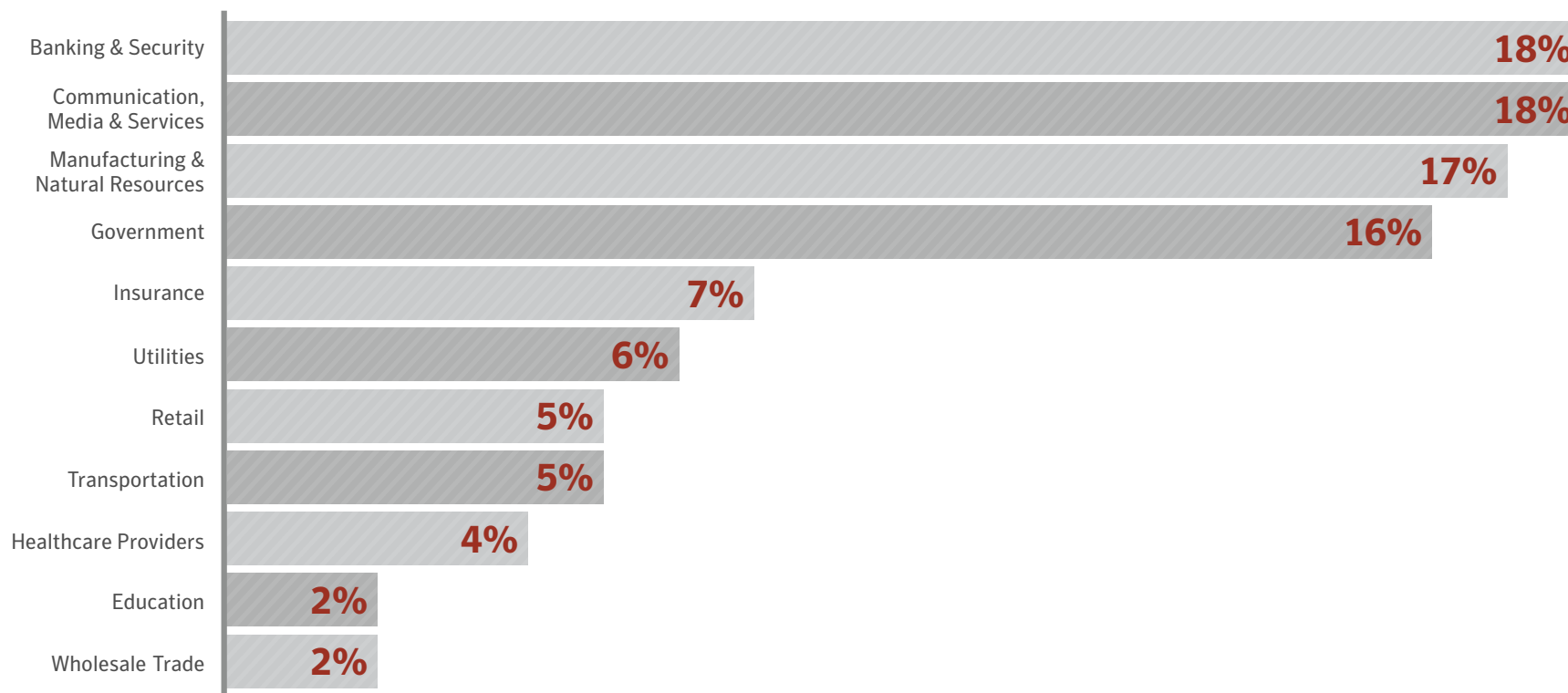**40%** — Endpoint Detection and Response YoY Market Growth

10% — Symantec's TAM Growth for FY17

Source: Symantec FY17 Market Opportunity Data, CSI Business Insights & Analytics

ENTERPRISE IT SPENDING

Across the EMEA region, four key verticals are expected to represent 69% of all IT spend in 2016 – Banking & Securities; Communications, Media & Services; Manufacturing & Natural Resources; and Government.
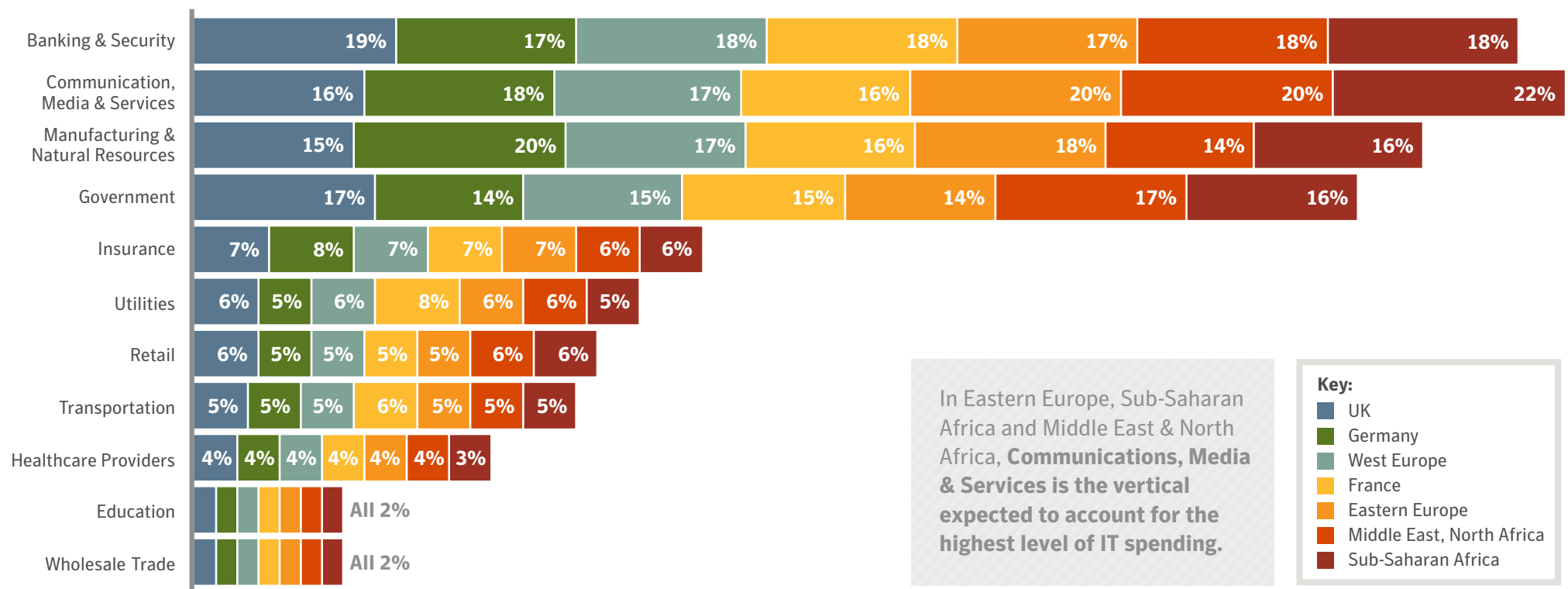
EMEA Enterprise IT Spending by Vertical – Overview

Vertical	Percentage
Banking & Security	18%
Communication, Media & Services	18%
Manufacturing & Natural Resources	17%
Government	16%
Insurance	7%
Utilities	6%
Retail	5%
Transportation	5%
Healthcare Providers	4%
Education	2%
Wholesale Trade	2%

REGIONAL DIFFERENCES

The four key verticals – Communication, Media & Services; Banking & Security; Manufacturing & Natural Resources; Government – are expected to dominate market activity in the UK, France, Germany and Western Europe.

EMEA Enterprise IT Spending by Vertical – In Detail

Vertical	UK	Germany	West Europe	France	Eastern Europe	Middle East, North Africa	Sub-Saharan Africa
Banking & Security	19%	17%	18%	18%	17%	18%	18%
Communication, Media & Services	16%	18%	17%	16%	20%	20%	22%
Manufacturing & Natural Resources	15%	20%	17%	16%	18%	14%	16%
Government	17%	14%	15%	15%	14%	17%	16%
Insurance	7%	8%	7%	7%	7%	6%	6%
Utilities	6%	5%	6%	8%	6%	6%	5%
Retail	6%	5%	5%	5%	5%	6%	6%
Transportation	5%	5%	5%	6%	5%	5%	5%
Healthcare Providers	4%	4%	4%	4%	4%	4%	3%
Education				All 2%			
Wholesale Trade				All 2%			

In Eastern Europe, Sub-Saharan Africa and Middle East & North Africa, **Communications, Media & Services is the vertical expected to account for the highest level of IT spending.**

Key:
- UK
- Germany
- West Europe
- France
- Eastern Europe
- Middle East, North Africa
- Sub-Saharan Africa

GLOSSARY

CIO – Chief Information Officer

CISO – Chief Information Security Officer

SaaS – Software-as-a-Service

DLP – Data Loss Prevention

IoT – Internet of Things

CSS – Cyber Security Services

MSS – Managed Security Services

CAGR – Compound Annual Growth Rate

TAM – Total Addressable Market

Symantec.