

Data Center Disruption

Breaking the Boundaries in a
Hybrid & Multi-Cloud World

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81%

of enterprises
have a strategy
to use
multiple clouds

51%

of enterprises
have a strategy
to use
hybrid cloud

5%

of enterprises
have no plans
to use cloud

Industry
Trends

Investment
Approach

Industry
Trends

Investment
Approach

2019 Industry Trends

Data Center

Fragmentation of
IT infrastructure

Transition towards
SW-defined DC

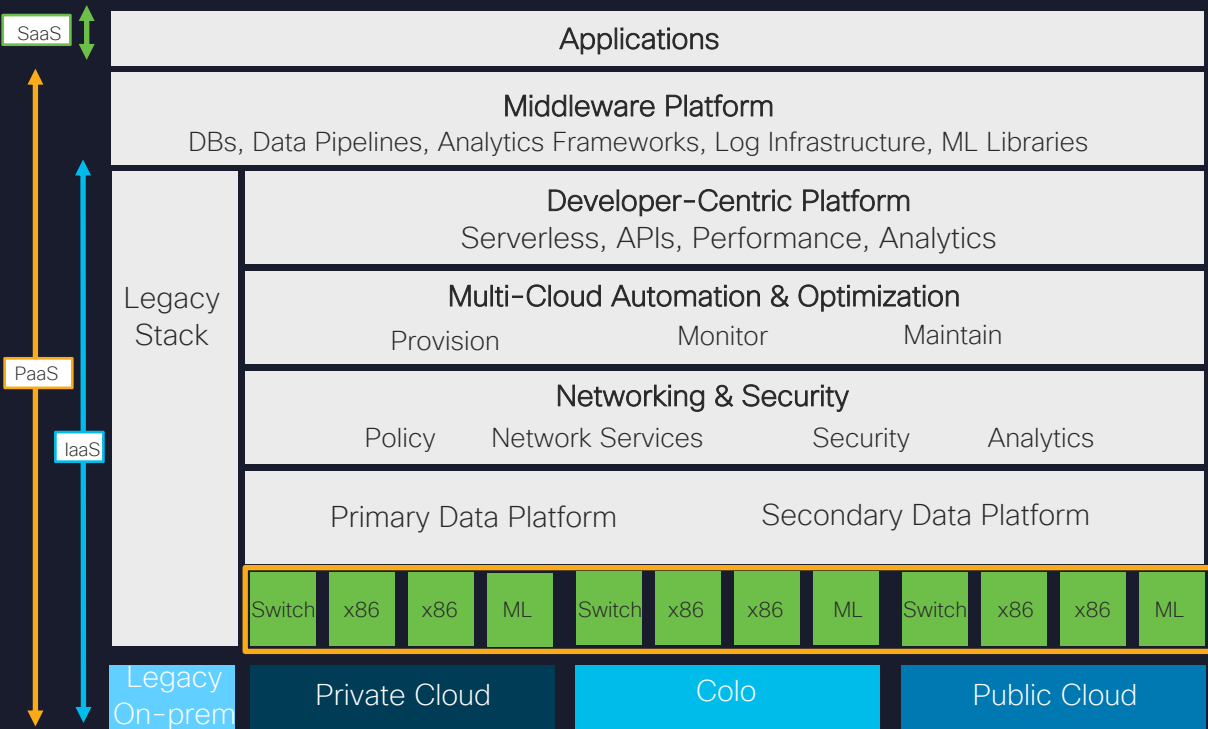
Value in breadth

IT spend shift towards
OpEx/subscription-based

Developers are the
new Kingmakers

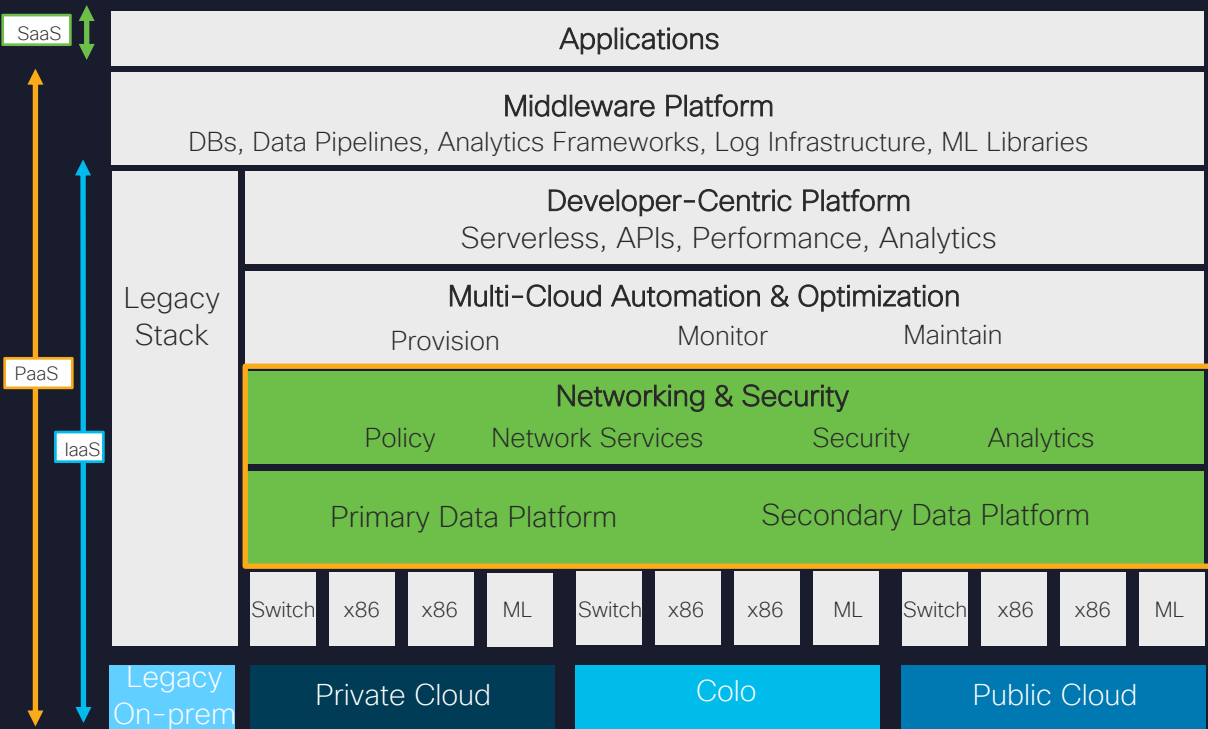
Rise of Open Source
Software (OSS)

Data Center of the Future



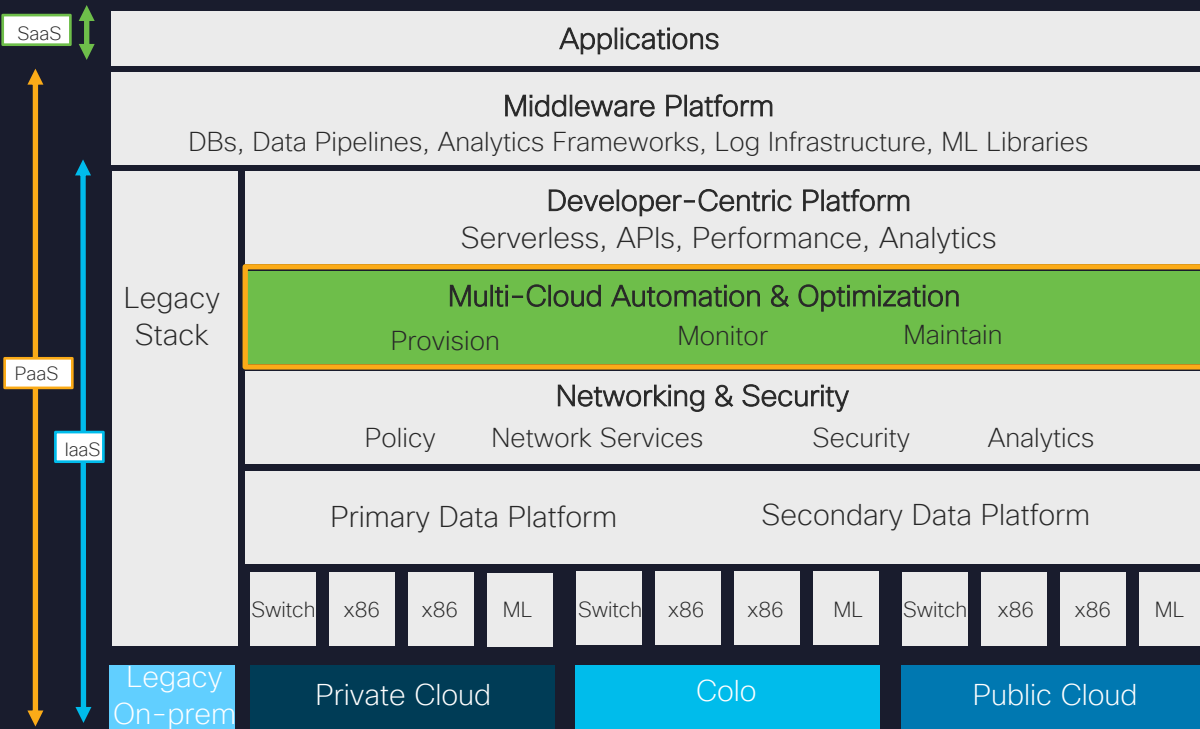
- 1 Developer-centric mentality continues to drive abstraction of the HW stack and shift towards SW-defined Data Center
- 2 Tale of Two Cities with HW: Differentiated HW vs. Undifferentiated HW

Data Center of the Future



1 SW-defined Infrastructure (SDS and SDN) will create a horizontal SW-based Data Platforms and Network & Security stack across the entire IT infrastructure regardless of location

Data Center of the Future



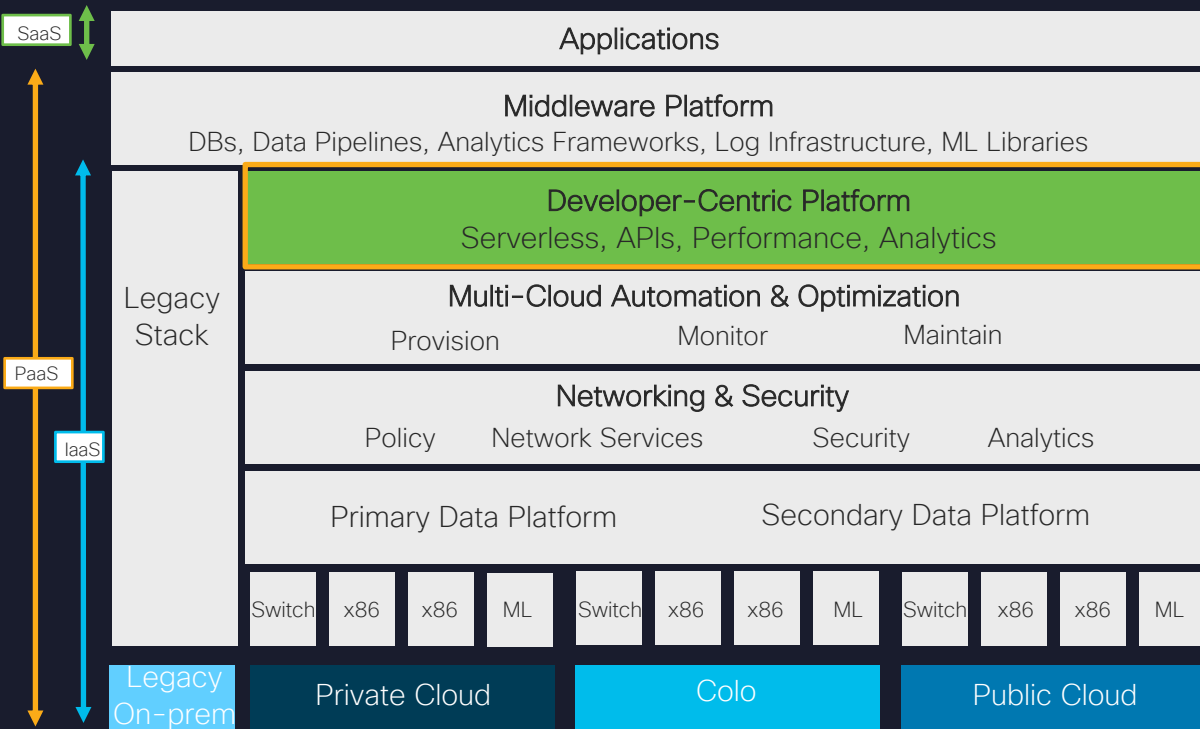
1

Transition to SW in the infrastructure stack drives the need for a multi-cloud automation

2

Automation focus shifting post day-0 to maintenance, diagnostics and remediation to provide lifecycle management

Data Center of the Future



1

Developer-centric platform continues to gain importance given the transition of power to developers

Industry
Trends

Investment
Approach

Data Center Key Themes

Short Term

Core & Adjacencies

Software-driven x86-based solutions

Evolution of a networking stack around 4 A's

Containers and microservices creates
exponential complexity

Subscription and consumption models

Medium & Long Term

Adjacencies & New Markets

Machine/Deep Learning stack

Quantum Computing

Investments

Data Center Networking

Investment Strategies

- Build networking **software stack** for **availability and assurance** by extending NAE into availability oriented functions and non-ACI environments
- Build networking **software stack** for **analytics and security** by leveraging the Tetration platform
- **Microservices** creates **exponential complexity** in **networking**, security & management; gain visibility into microservices networking

Relevant Portfolio Companies



Investments

Compute & Storage

Investment Strategies

- Invest in software based disruptions to Storage & Data Management
- Track & gain visibility to innovations in Machine Learning
- Help our customers transition to Hybrid and Multi-Cloud environments
- Drive differentiation against our competitors in compute & hyperconverged

Relevant Portfolio Companies

COHESITY  elastifile

DataRobot

turbonomic

 STRATOSCALE

COHESITY



 CISCO
investments