Written by Alice Marshall
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EMEA purpose-built backup appliance (PBBA) revenues are up by 1.6% Y-o-Y in Q1 2019, IDC reports, reaching $249.6 million. PBBA open systems revenues are down by -2% Y-o-Y to $232.5m, while mainframe system sales are up by 102.2% Y-o-Y.

IDC defines a PBBA as a standalone disk-based solution utlising software, disk arrays, server engines or nodes for backup data-- specifically data coming from a backup application (such as NetWorker, NetBackup, TSM and Backup Exec) or can be tightly integrated with the backup software to catalog, index, schedule and perform data movement.

EMEA PBBA Vendor Revenue by Product, 1Q19 (Revenues in $M)

Vendor Revenues ($M)	1Q18 Revenue	1Q18 Market Share	1Q19 Revenue	1Q19 Market Share	1Q19/1Q18 Growth
Mainframe systems	$8.5	3.5%	$17.2	6.9%	102.2%
Open systems	$237.1	96.5%	$232.5	93.1%	-2.0%
Total	**$245.6**	**100.0%**	**$249.6**	**100.0%**	**1.6%**

EMEA PBBA Open Systems, 1Q19

Vendor Revenues ($M)	1Q18 Revenue	1Q18 Market Share	1Q19 Revenue	1Q19 Market Share	1Q19/1Q18 Growth
Integrated System	$83.2	35.1%	$79.8	34.3%	**-4.0%**
Target System	$154.0	64.9%	$152.7	65.7%	**-0.9%**
Total	**$237.1**	**100.0%**	**$232.5**	**100.0%**	**-2.0%**

"Despite the accelerated growth of on-demand cloud infrastructures for backup and DR activities, some EMEA organisations still perceive Backup aaS and DRaaS as risky over data loss due to malware or cyberattacks, which has resulted in sustained investment in PBBA systems, not just for backup, but also as repositories for their critical data," the analyst remarks.

PBBA revenues post "moderate" 2.5% Y-o-Y growth in W. Europe to reach $194.1m in Q1 2019. Benelux and Italy see "robust" spending, with respective growth reaching 127% and

24.8% Y-o-Y. IDC says organisations need to find a way to deal with growing data effectively and cost efficiently, and thus prefer invest in technologies able to evolve with evolving data requirements, such as capturing, protecting, recovering and safely sharing it among different environments, all with a low RTO/RPO.

CEMA sees a flat Q1 2019 with a -1.1% Y-o-Y drop on revenues worth $55.56m. The MEA market records a single digit decline while demand for backup appliances drives growth in CEE. Open systems dominate the market despite a slight drop (the result of "skyrocketing" Q1 2018 results), while mainframe systems generate growth and keep a niche position. IDC remarks the CEMA PBBA market shows "strong potential" for development, as supported by the seamless integration of products and support across both cloud and non-cloud environments.

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