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THE FUTURE OF SOFTWARE SUPPLY CHAINS

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Leading Cloud-Native + Best-in-Breed **Software Supply Chain Service**

REDACTED
Net Promoter Score
Avg Rating **REDACTED**

REDACTED#
Customers

$ 50 Billion+
Total Addressable Market

$ REDACTED
ARR*
Upto End of May 2021

3X
ARR Growth in 2020
10% MoM

REDACTED%
Net Revenue Retention

½ Billion
Service Requests
Past 3 Months

* $REDACTED ARR in April, and
~$REDACTED+ in June.

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Modern software is exploding in complexity, and almost all of it is not controlled by you.

Developers need to deliver value, faster and further. The only way to achieve this is to depend on developers, software and services outside of your control.

Distributing software at-scale compounds the complexity, and difficulty, and the push to focus on speed of delivery is often at the sacrifice of quality and safety.

Speed

Quality   Safety

The average number of indirect dependencies per project is 500+; at 5+ contributors per dependency, that is 2,500+ outsider developers you don't know.

91% of projects have exploitable, out-of-date or unmaintained dependencies; also, 7 out of 10 lines of source code comes from external sources.

By 2023, 40% of orgs will ship code daily, vs. 3% in 2019. Orgs are shifting to Cloud and DevOps, turning this into a large-scale distribution problem.

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Delivering software at-speed without safety, is like racing in the dark with no seat belt.

Software delivered without controls is likely to be exploitable, opening it to supply-chain attacks on you or others.

Without traceability or visibility, you may not even know it has happened. The impact may be a total loss of assets or trust.

Ultimately, the software supply chain is completely broken.

A supply-chain attack on SolarWinds resulted in companies like FireEye being critically compromised by the SUNBURST trojan horse.

Monday.com disclosed that their intellectual property was stolen via a CodeCov supply-chain attack that has affected countless companies.

Everything is distributed: your infrastructure, teams, access & security. Software distribution bottlenecks create software delivery bottlenecks.

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Logistics for a Cloud-enabled world requires a Cloud-Native Software Supply Chain.

CI/CD and DevOps are part of modern software supply chains, but a truly holistic view from source to delivery is required.

A solution that powers global infrastructure at-scale, and provides criticality of performance, observability and isolation.

A logistics-based smart CDN that offers controls and insights; a software-aware Package Distribution Network (PDN).

President Biden's administration issued an executive order to strengthen and protect supply chains; a "certified hub" could lead the way.

GitHub acknowledges the supply chain is far more than source code, and is anything that touches your software, including other supply chains.

The 5 Traits of a Trusted Distribution Mechanisms include: being fast, secure, global, scalable and simple. The future of distribution is at the edge.

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Cloudsmith is solving the future of logistics by evolving the Package Management of today.

Today, we are mission critical; securely delivering from software supply-chains at-scale and at-speed. The last line of defense.

Tomorrow, we're building a deep understanding of the fabric of all software and dependencies, known as The Mesh.

Offering insights and control into all interconnected supply chains beyond yours; a worldview of the global Software Bill of Materials.

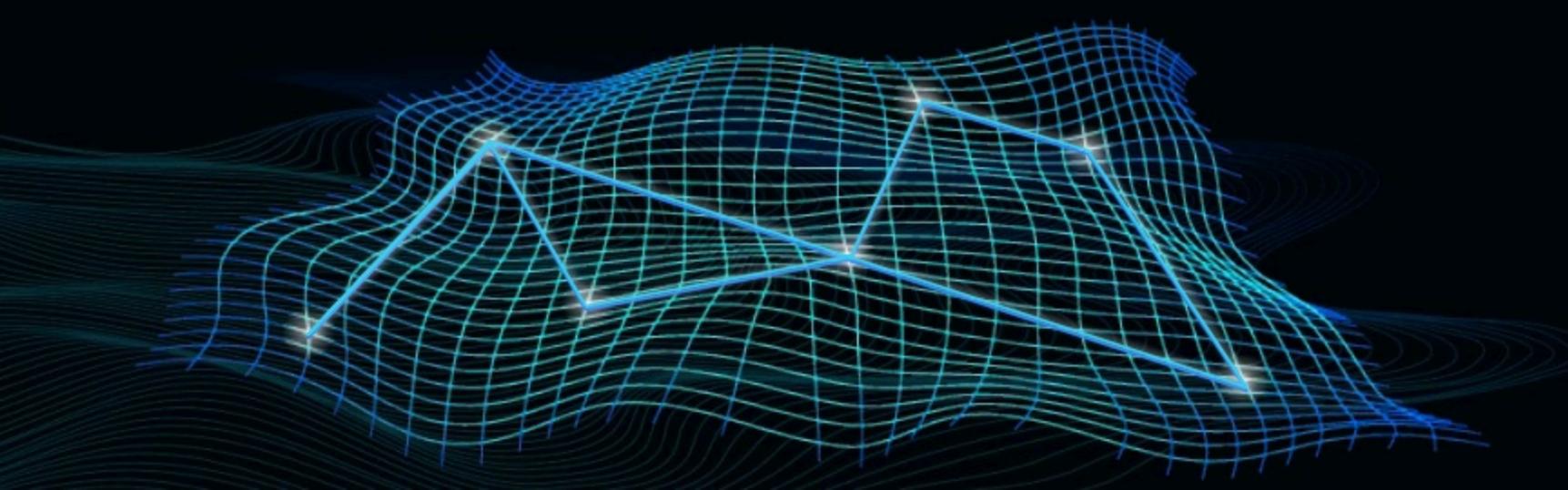**OBSERVABILITY**

A tight feedback loop of supply-chain knowing.

CONTROL

Delivering at-speed with maximum safety/quality.

PERFORMANCE

Highly available, performant, secured & compliant.

CORE ATTRIBUTES OF PACKAGE MANAGEMENT

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shopify

" The on-prem infrastructure we ran was brittle and we spent too much time maintaining it. Cloudsmith was the only vendor that covered all the bases and are exceptionally responsive to the challenges we face, solving the complexity of our software supply chain."

Darren Worrall
Staff Production Engineer

Killer Use-Case: Centralising all dev teams/technologies (e.g. Ruby, Java, Docker) into one controlled + managed place, in the Cloud, accessible anywhere in the world.

| **SCALE**	**COLLABORATION**	**TCO REALLOCATION**		
Aligns with goals of securing the supply chain at-scale, plus global infrastructure.	Much more collaborative, allowing expansion to all developer teams.	Massive reduction of burden on staff, allowing a lift and shift of TCO elsewhere.	**$REDACTED**	**$REDACTED**
KEY BENEFITS			**INITIAL DEAL SIZE (ACV)**	**EXPECTED GROWTH YEAR 1**

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Over REDACTED# customers distributing to millions.
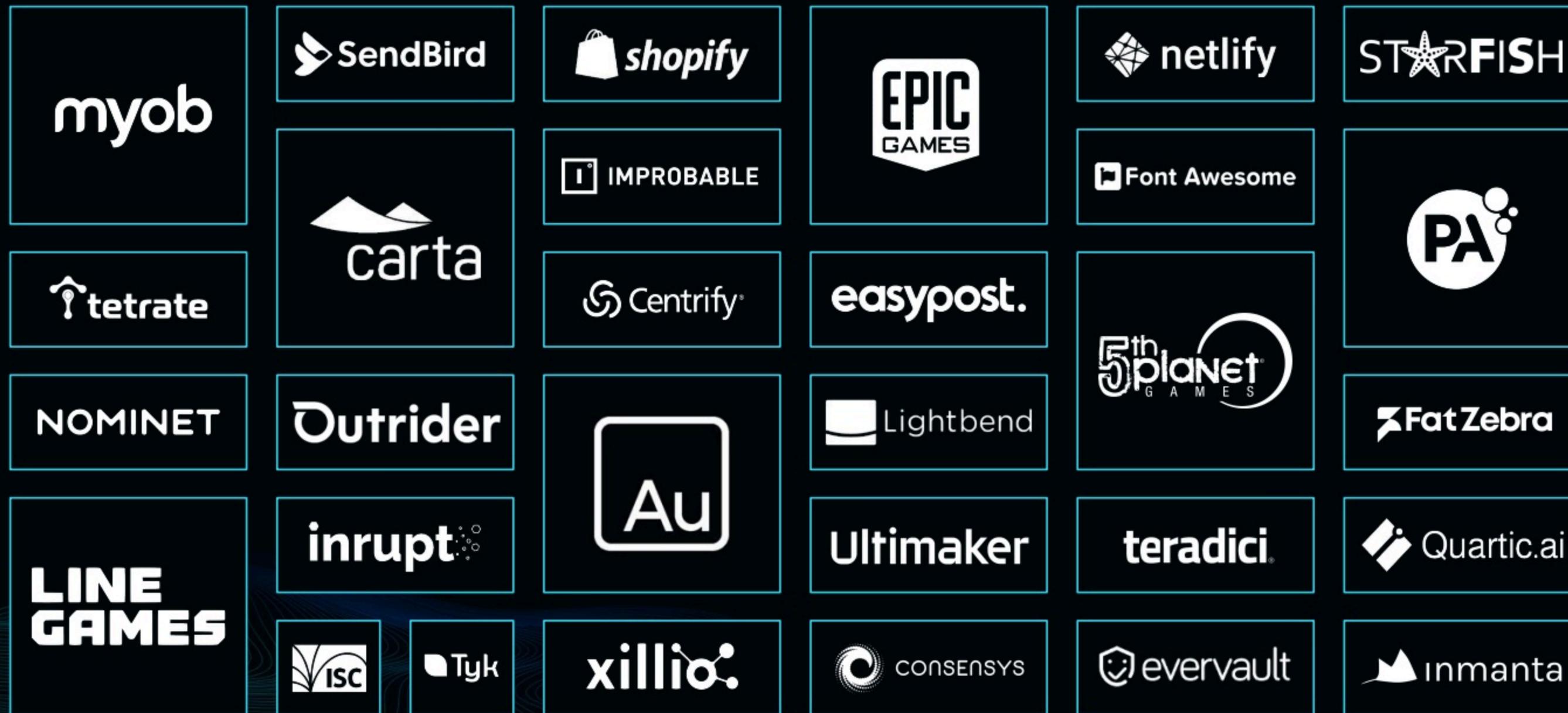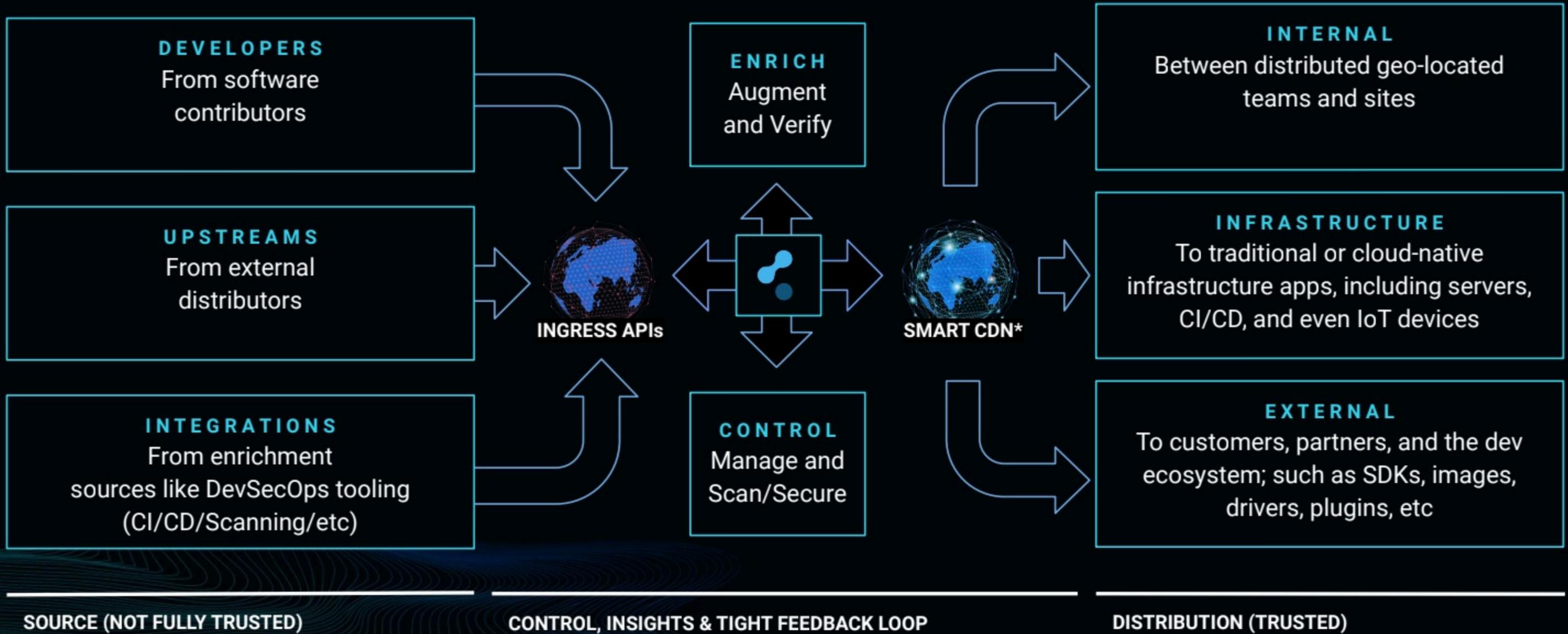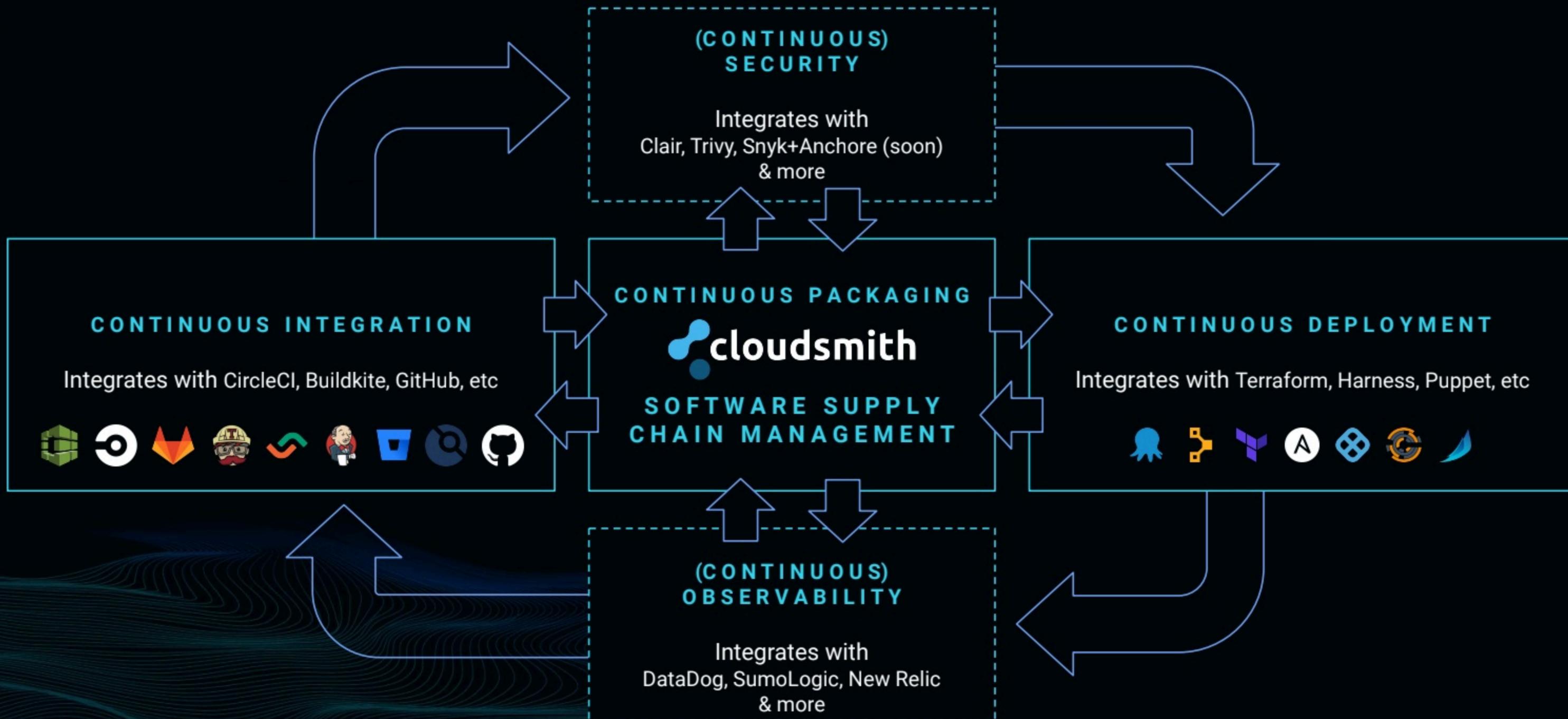
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Category-defining technology for the next decade.

CLOUDSMITH

JFROG, SONATYPE

GITHUB, PACKAGECLOUD

FUTURE

The Mesh - connecting the fabric between all software, globally

Software Intelligence - mining crucial software insights with deep learning

CLOUDSMITH NOW

Global Infrastructure - globally managed infrastructure for all distribution

Smart Edge Distribution - intelligently connecting producers and consumers

Security & Licence Compliance - securing the supply from source to delivery
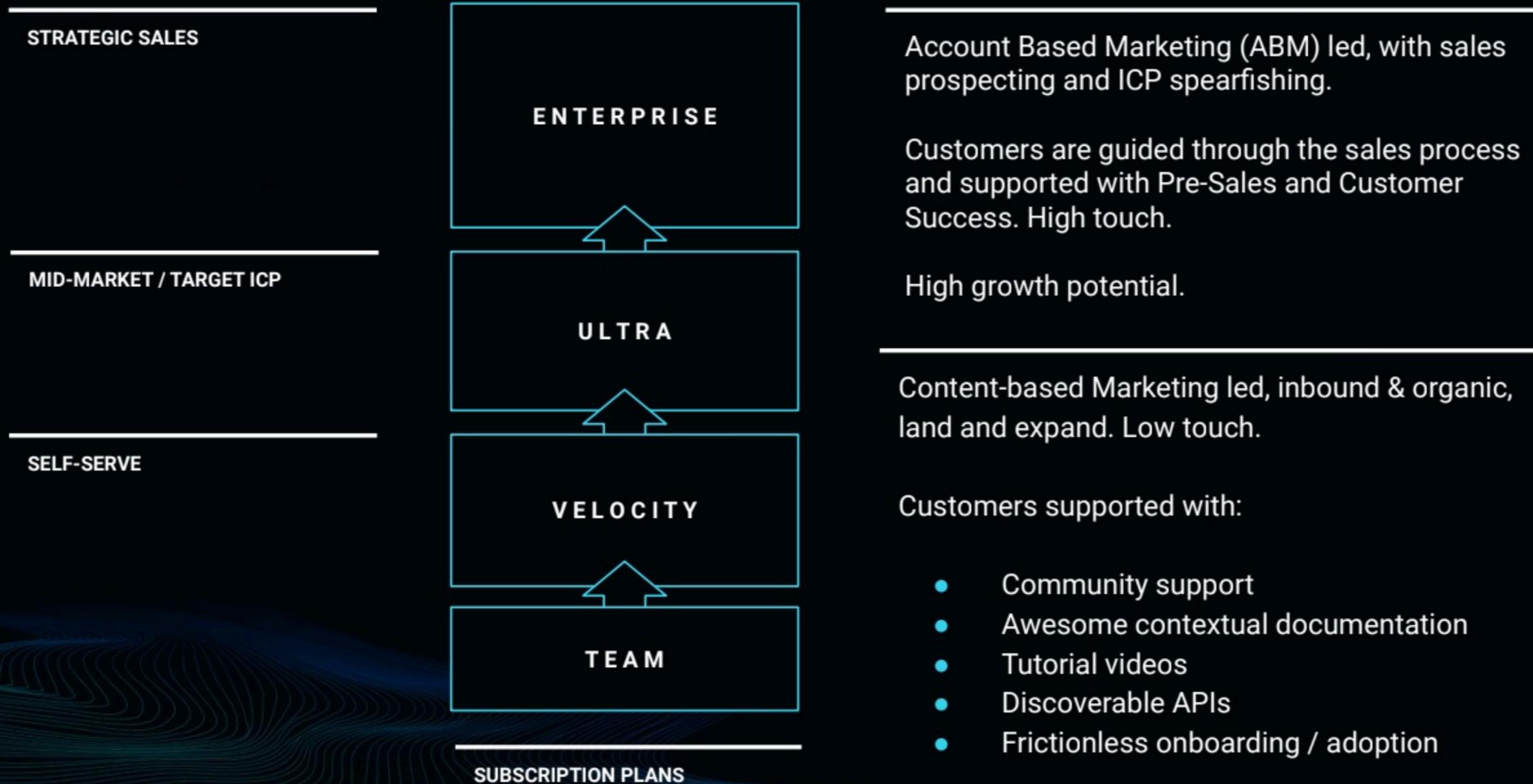
Upstreams & Caching - isolating and protecting from unstable environments

Storage & Retrieval - the most basic functionality of package management

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	CUSTOMERS	ACV	ARR		ARR = SUBSCRIPTION (LEFT) + ON-DEMAND(RIGHT)	
ULTRA	REDACTED#	$REDACTED	$REDACTED	59%	$REDACTED	$REDACTED
VELOCITY SELF-SERVE	REDACTED#	$REDACTED	$REDACTED	23%	$REDACTED	$REDACTED
TEAM SELF-SERVE	REDACTED#	$REDACTED	$REDACTED	18%	$REDACTED	$REDACTED
	REDACTED#	$REDACTED	$REDACTED		$REDACTED = $REDACTED + $REDACTED	

DATA CORRECT TO END APR 2021

GO TO MARKET

Building a sustainable growth engine, from mid-market today through to enterprise.

STRATEGIC SALES

MID-MARKET / TARGET ICP

SELF-SERVE

ENTERPRISE

ULTRA

VELOCITY

TEAM

SUBSCRIPTION PLANS

Account Based Marketing (ABM) led, with sales prospecting and ICP spearfishing.

Customers are guided through the sales process and supported with Pre-Sales and Customer Success. High touch.

High growth potential.

Content-based Marketing led, inbound & organic, land and expand. Low touch.

Customers supported with:

- Community support
- Awesome contextual documentation
- Tutorial videos
- Discoverable APIs
- Frictionless onboarding / adoption

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How we target customers and spearfish for developers.

TAM

All Software Companies
Significant greenfield opportunities

SOM

Scaling level of complexity
R&D size of 50 and more developers
Portfolio of products & technologies
Distributing at-scale locally or remotely
Multiple development teams
Multiple development centres
Heavy reliance on pipeline automation
Uses infrastructure-as-code tooling
Uses security or source control tooling

ICP

Dedicated DevOps function or teams
Dedicated Security function or teams
Key people "DevOps Lead" and "CISO"

SPEARFISHING

Competitor names in job listings
Competitor names in LinkedIn
CI/CD technologies in jobs and profiles

$ 500 Billion

TOTAL ADDRESSABLE MARKET

$ 100 Billion

SERVICE OBTAINABLE MARKET

$ 50 Billion*

IDEAL CUSTOMER PROFILE

* JFrog state a 1% capture of a (partial overlap) $22bn addressable market, and of that, only 23% is within the Cloud-based market.