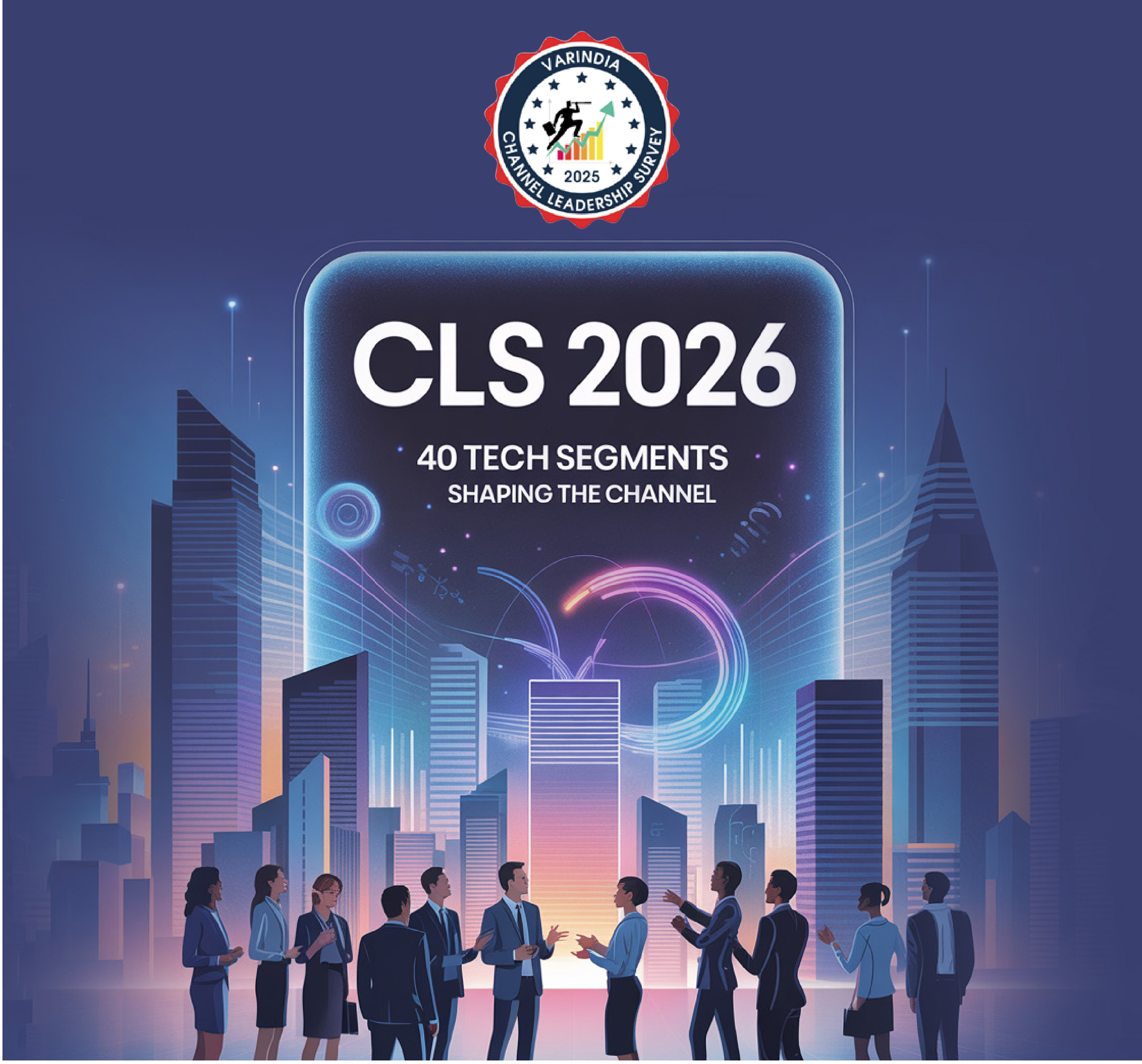


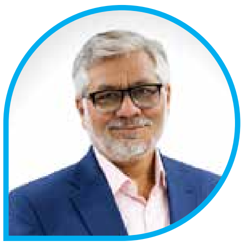
Digital transformation, when aligned with people, processes, and operations, enables businesses to adapt, meet evolving customer needs, and drive growth and innovation. As technology continues to evolve, it will play an increasingly important role in shaping the future of last-mile delivery in India. Partners are continued to play a critical role in ensuring that this technology reaches the "last mile"—the end users or consumers.

Indeed, technology has the power to streamline processes, automate routine tasks, and enhance efficiency, enabling organizations to accomplish more with fewer resources. The Annual Channel Leadership Survey (CLS 2026) represents an integrated and landmark report for the technology industry, featured in the 26th Anniversary Special Issue this September. Now in its 18th year, the survey continues its legacy of delivering in-depth insights into key trends, emerging technologies, and the evolution of products—spanning hardware, software, and services—shaped by leading technology vendors.

The Annual Channel Leadership Survey (CLS 2026) continues to be a testament to how the technology landscape is shifting fast, with AI, cloud, and integrated cybersecurity driving a move from traditional IT sales to recurring, high-value service models favored by VARs and partners. The CLS 2026 survey outlines, VARs and system integrators now prioritize vendors that deliver predictable recurring revenue models and robust training in high-value services such as managed security and data engineering. They seek partners who combine technological excellence with ease of engagement and strong professional services enablement

The landmark issue, spotlighting 200 leading Channel Partners whose visionary strategies and flawless execution are redefining the technology channel ecosystem. The edition also identifies true industry leaders based on sales performance, service excellence, product availability, channel initiatives, and partner incentives. Insights from the survey uncover pressing challenges within the channel ecosystem, offering vendors a roadmap to strengthen partnerships and drive sustainable growth. The survey uncovers, "Channel partners hesitate to share customer data due to trust issues and fear of losing business. Vendors must address this by enforcing transparent channel policies and deploying secure, leakproof systems to protect partner information—building trust and enabling stronger collaboration for growth."

The Channel Leadership Survey (CLS 2026) highlights who are the OEMs leading in this space while offering the industry vital insights on optimizing channel partnerships.



Acer localizing its product portfolio to cater to Indian consumers

SANJEEV MEHTANI, CHIEF SALES OFFICER, ACER INDIA

"At Acer, we believe our channel partners are the backbone of our growth in India, and strengthening this ecosystem has always been a top priority for us. Over the past year, we have introduced multiple initiatives to enhance partner engagement, profitability, and long-term sustainability. We have expanded our partner programs with structured incentives, joint marketing opportunities, and training modules to help them build expertise around our latest AI PCs, gaming systems, and enterprise solutions. To further enable growth, we have strengthened our regional distributor network, optimized supply chain efficiencies, and invested in digital platforms that provide real-time visibility on inventory, pricing, and support. Beyond transactions, we are also focused on building stronger relationships through regular partner meets, feedback sessions, and certification programs, ensuring our ecosystem is equipped to deliver the best value to customers across India."

Streamlining distribution and investments to help partners grow sustainably

PARAG KHURANA, COUNTRY MANAGER FOR INDIA, BARRACUDA

"Our priority is to help partners build their business and better serve their customers. To achieve this, we've doubled down on partner support through our Partner Success Program, with a clear focus on enablement, lifecycle engagement and incentives. We're further evolving our partner strategy by extending routes to market. This includes greater automation, improved accessibility, and more ways to transact, which will open up new opportunities for partners and their customers. We are a partner-first company, and our partners need solutions that meet customer demands for robust, adaptive and integrated security. Our award-winning customer support and AI-powered solutions simplify delivery, automate response, and improve visibility. In India, we are streamlining distribution and investing in programs that help partners operate smarter and grow sustainably."

Check Point aims to scale its partner ecosystem beyond metros, to Tier 2 and Tier 3 cities

MANISH ALSHI, SENIOR DIRECTOR, CHANNELS & ALLIANCES, CHECK POINT SOFTWARE TECHNOLOGIES, INDIA & SOUTH ASIA

"At Check Point Software, we operate on a 100% channel-driven go-to-market model in India. To strengthen this ecosystem, we launched the New Generation Partner Program (NGPP), which simplifies engagement, enhances profitability, and supports specialization across key solution areas like cloud, endpoint, and network security. We have reduced tier complexity (from six to four), rolled out specializations, and introduced India-specific incentive structures like deal registration benefits, rebates, and the incumbent partner program. We also doubled the channel team size to provide more comprehensive regional support, especially a growing India which is recognising the need for more prevention – first cyber security. These efforts collectively aim to scale the ecosystem beyond metros, reaching Tier 2 and Tier 3 cities, MSMEs, and regional partners. Our partner policy is built on four key pillars - Simplicity & Transparency; Enablement & Tools'; Incentivization and Joint growth initiatives."

Extensive guidance and access to resources included as part of CommScope PartnerPRO program

MYLARAIAH JN, VICE PRESIDENT OF BUILDING & CAMPUS BUSINESS, INDIA & SAARC, COMMSCOPE

"CommScope's PartnerPRO Network features an exclusive global network of experts designed to help customers and partners discover new revenue opportunities. CommScope has built programs around our four partner types - namely Distributors, Solutions providers, Ecosystem, and Alliance to support our market solutions. Our partners are trained to provide local insights, which puts our high-performance solutions to work. This will provide our customers access to the right provider based on their needs. For our partners, this measure allows them to select the right relationship with CommScope based on their business model and expertise. Extensive guidance and access to resources for partners are also included as part of the PartnerPRO program, to elevate their marketing and technical expertise. Our competitiveness lies in this globally consistent network of the best solutions and the expertise available."

Building an ecosystem of Indian Talent, Technology, and Trust

ADITYA KHEMKA, MANAGING DIRECTOR, CP PLUS

"Our commitment to promoting growth and prioritizing our partners is evident in the design of our partnership model. We understand that transparency and fairness are essential for building trust and fostering long-term relationships. Therefore, we ensure that our partnership model is built on principles of fairness and transparency. When designing our partnership model, we undertake several key steps to create a thriving and connected ecosystem. Firstly, we conduct thorough market research to understand the needs and challenges of our partners and VARs. This enables us to tailor our programs and initiatives to address their specific requirements effectively. Secondly, we engage in open communication with our partners to gather feedback and insights continuously. Thirdly, with the help of our Mission Tech programme, we provide comprehensive training and support to our partners to empower them with the knowledge and skills needed to succeed in today's competitive market."

Channel and partner ecosystem engagement continue to be vital for CrowdStrike

JON FOX, VICE PRESIDENT CHANNELS AND ALLIANCES, CROWDSTRIKE ASIA PACIFIC AND JAPAN

"CrowdStrike has introduced and expanded multiple initiatives to help our channel ecosystem accelerate their business growth and deliver superior customer outcomes by consolidating on the AI-native CrowdStrike Falcon platform.

Most recently, we announced a new strategic distribution agreement with Redington. We continue to run regional, local, and virtual enablement initiatives, such as our CrowdConnect events and Falcon Champions program, to upskill our partners' sales teams and technical experts on how best to position CrowdStrike to new and existing customers. As a channel-first company, in providing customers with industry-leading cybersecurity solutions and services — and the force multiplier behind our continued growth. At CrowdStrike, we want our partners to be focused on driving growth of the Falcon platform."

Aiming to build a sustainable, growth-driven channel ecosystem

DHRUV KHANNA, CEO & CO-FOUNDER, DATA RESOLVE TECHNOLOGIES

"At Data Resolve, we view our channel ecosystem as the backbone of our growth strategy. Over the past year, we have introduced a series of structured initiatives to strengthen partner capabilities and drive market reach. These include:

- Comprehensive sales and technical enablement programs to enhance product knowledge and solution positioning.
- Joint webinars and co-branded campaigns to generate demand and create customer awareness.
- City-level partner engagement events to build stronger regional presence and foster collaboration.

We ensure our partners are equipped not only with a deep understanding of inDefend's endpoint DLP and insider threat management capabilities, but also with the resources and support required to address evolving customer challenges."

Elastic working to create a better experience for its Indian partners

KARTHIK RAJARAM, AREA VICE PRESIDENT & GENERAL MANAGER, INDIA - ELASTIC

"Over the past year, we have sharpened our focus on enabling partners in India to compete and grow in an environment that is being reshaped by AI. We are currently working to create a better experience for our channel partners in India with an increased headcount, including partner managers, solutions architects, and sales teams. For India and the rest of the world, we are scaling our partner ecosystem using distributors, who in turn make our Search AI solutions for search, observability, and security, readily accessible to customers and other partners in a market. The Elastic AI Ecosystem was announced in November 2024 to provide enterprise developers with a curated, comprehensive set of partner AI technologies and tools integrated with the Elasticsearch vector database, designed to accelerate innovation."

Equipping partners to address evolving customer demands

MANOJ GUPTA, MANAGING DIRECTOR, FORTUNE MARKETING

"At Fortune Marketing, we believe our channel partners are the backbone of our growth. We are continuously expanding our distribution network to tier II and III cities to ensure deeper market penetration. Alongside, we are investing in training programs, regular partner meets, and digital enablement tools so that our partners are equipped to address evolving customer demands. Our initiatives also include transparent incentive schemes, faster credit support, and joint marketing campaigns to create long-term value for our ecosystem. We were also among the early movers to align with the Make in India initiative. In 2022, we established a Manufacturing Unit in Noida, where we are producing pen drives, surveillance products, networking devices, and telecom equipment under our in-house brands. Tenda and Secureye's products are proudly manufactured in India, which not only reduces import dependency but also generates local employment and contributes to India's self-reliance."

Making inroads into the India market through Innovation and Investment

PETER JAYASEELAN, VP SOUTH ASIA & CHANNELS (APAC), JABRA

"Jabra has been in India and the rest of the South Asian market for the last 25 years; essentially the company initially catered to the needs of the contact center, when it was a booming industry in India. What this industry required was essentially very good audio devices which could provide crystal clear voice to their customers and also comfort to their agents. During this time, there was a big move towards Unified Communication as a lot of industries, especially the IT industry started embracing it. So that's when we started working with a lot of these partners who provide IT equipment and supporting services to these multinational and software companies, besides the non IT sector and small and medium businesses. Globally, Jabra has always been 100% indirect and would always work along with its partners."

NetApp aims to build a trusted, long-term partner ecosystem in India

HITESH JOSHI, DIRECTOR - CHANNELS AND ALLIANCE, INDIA & SAARC, NETAPP

"NetApp sees its partners as an extension of its business, and strengthening the channel ecosystem in India continues to be a top priority. Over the past few months, we have rolled out initiatives to help partners capitalise on the growing demand for cloud, AI, and hybrid multicloud solutions. We have expanded our Partner Sphere program to provide deeper training, enablement, and rewards, making it easier for partners to differentiate themselves and deliver greater value to customers. Our focus is on co-innovation — giving partners access to NetApp's latest cloud-native, data management, and AI-ready infrastructure solutions. We are also investing in regional partner support and co-marketing initiatives in India to build stronger go-to-market motions. By simplifying engagement models, increasing agility in deal support, and creating more opportunities for joint growth, we're ensuring that our partners are well-equipped to address the evolving needs of Indian enterprises in today's AI-driven, digital-first economy."

India set to become the second-largest region for Nutanix globally

HARSH VAISHNAV, DIRECTOR AND HEAD OF CHANNELS, SOUTHERN ASIA, NUTANIX

"Nutanix is a partner-first company. Our channel strategy is built on simplicity, flexibility, and ease of engagement, ensuring that customer and partner success remain central to everything we do. Over the past year, we have introduced several initiatives under our partner program, Elevate, from enhanced deal-registration benefits and stackable rebates to the Surge incentive for net-new accounts, particularly following VMware migrations to our platform. We have also advanced channel autonomy, enabling partners to manage deals with reduced friction, supported by competencies, Sizer accreditations, and simplified SKUs. In India, this approach has been strengthened through deeper collaboration with leading distributors, OEMs and Premier partners, along with enablement around AI, Kubernetes, and migration toolchains such as Nutanix Move, equipping partners to build sustainable, service-led practices enabled by the Nutanix Cloud Platform."

Channel acts as Optoma's extended arms to reach out to diverse customer segments

VIJAY SHARMA, MANAGING DIRECTOR, OPTOMA TECHNOLOGY

"With the aim of building stronger relationships with local dealers, after operating in India for more than a decade, we opened our head office in New Delhi last year. This strategic expansion is helping us to build a robust channel ecosystem, enabling seamless operations across the country and providing more flexible, comprehensive global services to our partners.

Over the past few years, Optoma has also strengthened its relationships with partners in the country by following fair and transparent policies that ensure healthy margins while maintaining attractive pricing across our entire product range. These partners are the backbone of our operations and have contributed significantly to our growth trajectory. Our Channel partner's local presence and strong relationships enable us to access markets that would otherwise be difficult to reach directly."

Pure Storage strengthens its partner ecosystem by investing in their long-term success

JITHESH CHEMBIL, HEAD OF CHANNELS, PURE STORAGE INDIA

"At Pure Storage, our commitment to strengthening the channel ecosystem in India begins with investing in the long-term success of our partners. Over the last year, we have introduced targeted programs to expand partner capabilities, enhance profitability, and accelerate go-to-market execution. Our Pure WaveMakers partner program has been adapted for India to include specialized training modules, co-marketing support, and market development funds to help partners reach new customers in high-growth segments such as BFSI, manufacturing, and healthcare. We have also launched advanced digital tools that provide partners with real-time deal insights, asset management capabilities, and predictive renewal analytics, empowering them to identify opportunities faster and serve customers more effectively. Pure Storage solutions are designed to help Indian enterprises and SMEs stay ahead in a rapidly evolving digital economy."

Securonix commits to innovating locally and investing in people & partnerships

DIPESH KAURA, COUNTRY DIRECTOR – INDIA & SAARC, SECURONIX

"The channel partner program is the core of our growth strategy. Currently, approximately 64% of our global revenue comes from channel partnerships. We at Securonix continue to strengthen our channel ecosystem through certification and training programs for our various channel partners. Our channel program, "Securonix Elevate Program," is a strategic initiative designed to foster collaborative relationships that drive mutual growth and profitability. This enables solutions and service providers, including Managed Security Service Providers (MSSPs), Value Added Resellers (VARs), Technology Partners, System Integrators, and Technology Services Distributors (TSDs), to leverage the new SecOps capabilities from Securonix Agentic AI. For Securonix, India is not just another market but also our strategic innovation hub. 70% of our global workforce is based in India, where our R&D centers in Pune and Bangalore are delivering our core product innovation."

Equipping partners to deliver trusted IoT solutions across industries

MANISH KOTHARI, SENIOR VICE PRESIDENT, SILICON LABS

"At Silicon Labs, we view our channel ecosystem as a true extension of our team. Over the past year, we've worked closely with our partners in India to provide not only access to our latest secure wireless technologies, but also training, design support, and joint go-to-market programs. Our focus has been on equipping partners with the knowledge and resources to deliver trusted IoT solutions across industries like smart cities, healthcare, and manufacturing. We have also expanded collaboration with distributors and solution providers to ensure our Secure Vault-enabled products are widely accessible. Make in India is a significant driver of digital growth, and we fully support its vision. Our Hyderabad R&D center is a testament to this — it plays a central role in developing and validating secure semiconductor solutions locally."

Snowflake's success closely linked to the growth and success of partners

DHIRAJ NARANG, DIRECTOR AND HEAD OF PARTNERSHIPS- INDIA, SNOWFLAKE

Dhiraj Narang, Director and Head of Partnerships- India, Snowflake

"Snowflake's growth is deeply rooted in the synergies that our partners drive with us. Snowflake's partner ecosystem plays a pivotal role in helping businesses unlock the power of data. To power our growth, we have made significant investments in developing a robust Snowflake Partner Network (SPN), consisting of a broad array of cloud, services, technology, data providers, advisory firms, system integrators (SIs), and specialized resellers to scale customer outcomes. Our partners are strategically aligned with Snowflake's core goals: creating new routes to market, acquiring new customers, helping our joint customers extract value out of their Snowflake investments, and meeting industry-specific needs. Our partners play a critical role in helping organizations build robust data foundations—tackling challenges around governance, security, scalability, and collaboration— and helping unlock the full power of AI."

Socomec's vision is to serve as a trusted partner in India's energy transition

MEENU SINGHAL, REGIONAL MANAGING DIRECTOR, SOCOMEC, GREATER INDIA

"At Socomec, we follow a holistic approach to building a future-ready channel ecosystem in India. The Power+ Partner Program is at the heart of this strategy, offering structured onboarding and access to our complete portfolio of power management solutions. To drive digital empowerment, our MySocomec Partner Relationship Management (PRM) platform provides real-time access to sales tools, marketing resources, deal registration, and lead generation.

India's energy landscape is transforming rapidly with digitization, renewable adoption, and the rising demand for reliable power. Over the next five years, Socomec aims to empower Indian enterprises, SMEs, and critical infrastructure providers with solutions that ensure uninterrupted availability, higher energy efficiency, and lower carbon footprint. We are expanding our local manufacturing footprint in alignment with the Make in India vision while maintaining world-class quality and innovation."

SolarWinds committed to its partners through collaboration, shared growth and a unified vision

ROHIT KUMAR SHUKLA, SENIOR SALES DIRECTOR, INDIA & SAARC, SOLARWINDS

"At SolarWinds India, significant investment has been directed toward building a resilient channel ecosystem. The recent appointment of Sukhdeep Singh as the head of channel sales for Asia-Pacific and Japan underscores this focus, aiming to strengthen partner alliances, expand regional reach, and accelerate growth in the observability and IT management software business. Across regions, SolarWinds actively invests in the partner ecosystem through SolarWinds Partner Summits. The APJ summit in Phuket, for example, brought together partners to gain exclusive insights into the company's strategic vision, learn about the latest advancements, and explore effective sales strategies. In India we are a channel-first company helping partners to go beyond product sales and provide strategic consulting, industry insights, and expertise in implementation and support for their customers."

Enabling partners to deliver integrated cybersecurity outcomes

DEBASISH MUKHERJEE, VICE PRESIDENT OF SALES, APJ, SONICWALL

"Cyberattacks continue to increase in volume, velocity and sophistication, with ransomware, phishing, credential theft and zero-day threats targeting organizations of every size. The New SonicWall is secure, smart and scalable. It has evolved from a firewall vendor into a unified cybersecurity platform that protects across cloud, network and endpoint while supporting modern service delivery. Unified platform management — a single control layer that lets partners simplify operations, gain complete visibility and manage security outcomes for multiple customers. For partners, this means fewer silos, streamlined service delivery and a portfolio designed for recurring revenue.

SonicWall also builds service readiness into the platform. Partners can extend their offerings with SonicSentry and the Managed Protection Security Suite (MPSS)."

Sophos’ channel engagement policy comprises of Transparency, Fairness, and Growth

RAJEEV GUPTA, DIRECTOR OF CHANNEL SALES, INDIA & SAARC, SOPHOS

“At Sophos, our partners are at the heart of our go-to-market strategy. Over the past year, we have enhanced the Partner Program to make it more rewarding, flexible, and transparent. The introduction of Sophos Partner Care has created a 24x7 single point of contact for partners, reducing operational delays and helping them close deals faster. The launch of our local data center in Mumbai further strengthens the ecosystem by giving partners the ability to offer customers low-latency services that meet India’s data sovereignty requirements. Sophos solutions are designed to simplify security while ensuring resilience. Sophos Central provides unified cloud management, making it easier for businesses to secure hybrid environments. Flexible subscription and MSP models make enterprise-grade security affordable for SMEs, while continuous updates from SophosLabs keep organizations ahead of emerging threats.”

Helping partners successfully drive growth within India’s cybersecurity market

RAJNISH GUPTA, MANAGING DIRECTOR AND COUNTRY MANAGER, TENABLE INDIA

“Tenable, through its channel partnership, is committed to building a symbiotic growth relationship with our partners. In India, we continue to invest in training, certifications, and ongoing support to help partners enhance profitability and accelerate business outcomes.

We provide a wide range of resources, including sales and technical training, sales enablement tools, market development funds, purchase discounts, and pre-sales support. In addition, our programs enable partners to cross-sell validated Tenable integrations with other leading security vendors and leverage Tenable solutions to expand their own managed services offerings. Through these initiatives, we ensure our partners have both the resources and the incentives to successfully drive growth within India’s fast-evolving cybersecurity market. Tenable’s AI-driven exposure management platform helps Indian enterprises stay ahead of these evolving threats.”

Trend Micro works with partners who commit to transitioning from Resellers to Strategic Advisors

HIMANSHU KUMAR GUPTA, SR DIRECTOR - GOVERNMENT BUSINESS & CHANNELS, INDIA & SAARC, TREND MICRO

“Our success in India is linked to our partners; hence, we invest heavily in their success and, indirectly, our success as well. Over the past few years, we have shifted from a transactional to an ecosystem model where partners can develop into trusted advisors to their customers. A significant part of this shift is our enablement framework. Through the Trend Campus platform, partners get the capability to pick up role-based training and certifications, either in sales, presales, or services, thus gaining hands-on experience in areas like AI-powered threat intelligence, advanced detection, and automated risk response. Our Partner Competency Programme helps to certify a partner's maturity in high-growth areas like Managed Services and Incident Response. In addition, the engagement models have been streamlined, robust technical support has been introduced, and co-selling programs have been initiated.”

For Vehere, channel engagement is all about true partnerships

SANJAY BHARDWAJ, MD, INDIA AND ASEAN -- VEHERE

“At Vehere, we recognize that our partners are central to our growth and customer success. Over the last year, we’ve taken deliberate steps to strengthen the channel ecosystem in India. This includes introducing structured partner enablement programs with deeper technical training, sales certifications, and joint go-to-market initiatives. We have also enhanced deal registration and margin protection policies to ensure transparency and profitability for our partners. Beyond this, we are investing in co-marketing campaigns, demand generation activities, and localized support to help partners expand their reach. Our goal is simple: to build a channel ecosystem where partners see Vehere not just as a vendor, but as a trusted growth ally in cybersecurity and intelligence. We don’t just hand over a product brochure and walk away, we work hand-in-hand with our partners on every account, right from opportunity identification to closing deals and supporting deployments.”

Zebra Technologies focuses on building localized partnerships in high-growth markets

SUBRAMANIAM THIRUPPATHI, DIRECTOR ISC, ZEBRA TECHNOLOGIES

Zebra Technologies strengthens its channel ecosystem in India through the PartnerFirst program, part of the global PartnerConnect framework, which equips partners with AI-driven tools, specialized solutions, and comprehensive training for sectors like manufacturing, logistics, and retail. We regularly engage partners through events like the India Partner Summit, where we introduced AI-powered solutions to enhance asset visibility and operational efficiency, and TechDays, which provide hands-on training in advanced technologies like IoT and automation.

To expand reach, we focus on building localized partnerships in high-growth markets, ensuring access to advanced technologies and addressing regional challenges. By collaborating with distributors and technology integrators, we empower partners to deliver real-time visibility, scalable solutions, and customer success, driving productivity and cost efficiency across industries.”

ANTIVIRUS

An effective tool to combat Digital Threats

MARKET TRENDS

- The Antivirus Market in India is expected to grow at a **CAGR of 9.6%** from **2024 to 2029**, growing **$124.1 million** during this period, according to Technavio.
- Cloud-based antivirus software solutions have gained significant traction due to their ability to secure data in various applications such as authentication systems, video management systems, and biometric information storage.

FOCUS INDUSTRIES

- An increasing number of banks and hospitals store large volumes of confidential data in the cloud, owing to which anti-virus solutions are becoming crucial to ensure the security of this information from unauthorized access.
- Small and Medium Enterprises (SMEs) are particularly adopting cloud-based anti-virus services due to their cost-effectiveness and lack of requirement for infrastructure support.
- The rise in remote work have resulted in organizations implementing cloud-based services for critical business functions like CRM, payroll, and enterprise communication, enabling secure access to data from anywhere.

GROWTH FACTORS

- Increase in IT security budget
- Rise in the number of mobile devices and BYOD trend in offices
- Emergence of sophisticated cyberattacks and breaches

KEY VENDORS

kaspersky | Bitdefender | Quick Heal Security Simplified | Microsoft Defender | eset | norton | TREND MICRO

CLOUD SECURITY

Driving the demand for cloud security market

MARKET TRENDS

- The India cloud security market that generated a revenue of **$1,929.6 million** in **2024** is expected to reach **$4,959.7 million** by **2030,** according to Grand View Horizon research. It is forecasted to grow at a CAGR of **17.2%** from **2025** to **2030.**
- India is the fastest growing regional market in Asia Pacific when it comes to cloud security. As organizations prioritize data protection and security, the demand for cloud security solutions is expected to rise.
- Enterprises managing multiple incoherent security tools face operational inefficiencies and vulnerabilities. This complexity is steering demand toward integrated cloud security services and simplified architectures.
- Local/cloud sovereignty, partly triggered by geopolitical activities, is pushing demand for homegrown cloud and security platforms, reducing reliance on international service providers.

GROWTH FACTORS

- Tasked with the responsibility to protect sensitive data and meet regulatory requirements, India's growing tech sector is driving increased demand for cloud security solutions.
- Rapid digital transformation across sectors such as banking, telecommunications, e-commerce, and government initiatives are driving demand for secure cloud environments.
- Growing demand for massive storage applications to store and secure data on the cloud with advanced security models is driving this market.

KEY VENDORS

CISCO | Microsoft | IBM Security | FORTINET | CHECK POINT | paloalto | TREND MICRO

CYBER SECURITY

India's cybersecurity landscape evolving in a notable way

MARKET TRENDS

- Mordor Intelligence estimates the market currently at **$5.56 billion** in **2025**, while projecting it to reach **$12.90 billion** by **2030**, growing at a **CAGR** of **18.33%**.
- As one of the world's largest markets for internet usage, India is poised for significant improvements in cybersecurity.
- Along with the hardware segment (network security appliances, firewalls), software, cloud, security as a service segments generating equal amount of revenue.
- With small businesses lacking the necessary funds and IT security expertise to deploy advanced cybersecurity solutions to safeguard their networks and IT infrastructures, they are becoming increasingly vulnerable to various cyber threats.
- Lack of skill talent still persists

FOCUS INDUSTRIES

- Financial services (BFSI), e commerce, healthcare, telecoms are some of the big spenders.
- Government initiatives (Digital India, digital payments, critical infrastructure protection) contributing significantly. Critical infrastructure segment will continue to be major contributors.

GROWTH FACTORS

- Regulations and compliance pressure, CERT In guidelines, new data laws pushing organisations to adopt stronger cybersecurity controls.
- More frequent cyberattacks, data breaches, ransomware, topped up with threats targeting supply chains and connected devices demand the need for better tools.
- With AI/GenAI becoming widespread, investments are being made in securing applications.

KEY VENDORS

Cisco | paloalto | SONICWALL | FORTINET | CROWDSTRIKE | SOPHOS | kaspersky

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DATA CENTRE

Powered by Tech, Shaped by Policy

MARKET TRENDS

- India's data centre capacity will grow from **1,150 MW (Dec 2024)** to **2,100 MW (Mar 2027)**, needing **₹40,000–45,000 crore** in **2025–27** and up to **₹2.3 lakh crore** over the next decade. Data centers are the new oil fields of the AI economy..
- The robust growth was driven by increasing demand from Cloud service providers.
- India also enjoys the advantage of one of the lowest data usage costs and the world's second-largest mobile user market, resulting in strong digital growth.
- Large businesses in India are increasingly focus on tier 3 and tier 4 datacenters due to their lower downtime, disaster recovery, and onsite assistance facility, thus resulting in growth of tier 3 and tier 4 data centres in the region.
- AI ready data centres with high rack power are the next big thing taking place. Cooling technologies are also evolving.
- According to an S&P Global study, data centre capacity in South and Southeast Asia is expected to grow at a CAGR of 10% to 25% over the coming years, creating new investment and funding opportunities.

FOCUS INDUSTRIES

- With rise in land & real estate costs, new hubs & cloud regions are coming up in Tier 2/3 cities and moving beyond Mumbai, Delhi NCR, Chennai, Bangalore.
- AI / ML workloads, rising internet penetration, 5G rollout, streaming, e commerce driving the growth for data centres.
- While data centres consume a lot of power, securing reliable, affordable, green power is becoming crucial.

KEY VENDORS

NTT | sify | CtrlS | YOTTA | esds | nxtra by airtel | EQUINIX | IRON MOUNTAIN | TECHNO DIGITAL

DATA BACK-UP / RECOVERY

Data Safe, Business Strong

MARKET TRENDS

- The India Data Back-up/ Recovery market is expected to grow from **8.12($ Million)** in **2024** to **50 ($ Million)** by **2035**.
- Driven by concerns over data breaches amid the growing adoption of cloud data backup, and the accelerating trend of digitalization, the data backup market in India is set to experience substantial growth in the coming years.
- Regulations such as the Information Technology (IT) Act and the impending Digital Personal Data Protection Act create further impetus for businesses to enhance their data protection strategies.
- Companies increasingly invest in the development and storage of critical data and information, as loss of this data can lead to customer dissatisfaction, revenue loss, and even potential business insolvency.

GROWTH FACTORS

- The need for robust backup and recovery is on rise for BFSI, e commerce, healthcare, telecom, govt., as they continue to generate more data, and adopt cloud and hybrid infrastructures.
- In India, government initiatives like the 'Digital India' program are generating new opportunities for data backup companies nationwide.
- Small and medium enterprises in India increasingly adopting managed services / backup as a service rather than investing heavily in own infrastructure.

KEY VENDORS

veeam | COMMVAULT | DELL Technologies | VERITAS | Hewlett Packard Enterprise | IBM | Acronis | rubrik | COHESITY

DATA SECURITY & PRIVACY

Rising Breaches, Falling Trust

MARKET TRENDS

- With more organizations shifting data and workloads to the cloud or adopting hybrid architectures, there is an increased need for securing data in transit, enforcing encryption, managing access, detecting misconfigurations etc.
- India's swiftly growing digital landscape has resulted in several high-profile companies facing scrutiny and fines due to alleged data breaches or privacy violations. This highlights the difficulties of managing data responsibly.
- With the evolution of threats (state sponsored, AI enabled attacks) keeping up is becoming hard.

GROWTH FACTORS

- Importance of database Security tools are growing as organizations want to secure their databases without inviting penalties.
- As more organisations continue to digitize processes, make online transactions, increase mobile usage, etc. large volumes of sensitive data generate risk; hence data security becomes foundational.
- New and evolving data privacy and protection laws, data localization, etc., are pushing up demand for data security solutions.
- With Ransomware, data breaches, insider threats, supply chain attacks becoming more sophisticated, enterprises are investing in stronger data protection.

KEY VENDORS

IBM Security | Symantec by Broadcom | paloalto | FORTINET | CHECK POINT | VARONIS | datasafeguard | zscaler

ELECTRONIC SECURITY
Smarter Security with AI

MARKET TRENDS

- The India electronic security market generated a revenue of **$1,370.1 million** in **2024** and is expected to reach **$2,566.1 million** by **2030**, according to Grand View Research. It will grow at a **CAGR** of **11.3%** from **2025** to **2030**.
- In terms of technological advancements, the segment is witnessing use of AI/ML for anomaly detection, video analytics, and facial recognition. Shift from analog to IP based surveillance, use of cloud and integration of IoT sensors are other advancements happening.
- A large number of vendors offering video surveillance backed by AI-driven video analytics systems, which require less manual intervention, is a key trend dominating the electronic security market.

GROWTH FACTORS

- The electronic security market is moving toward AI-driven analytics, enabling real-time detection, predictive monitoring, and automated response. With improved accuracy and fewer false alarms, AI will dominate future deployments, delivering smarter surveillance, stronger safety, and greater efficiency across industries and critical infrastructure.
- In spite of challenges like high installation costs and limited awareness of advanced security benefits, substantial investments from both private and government sectors are supporting market growth.
- In light of crime, terrorism, vandalism, theft, threats to critical infrastructure, various State governments are enhancing public safety, particularly in urban areas, by incorporating advanced video surveillance systems.
- Enterprises, government bodies, and commercial establishments are increasing adoption of security tech.

KEY VENDORS

CP PLUS | HIKVISION | BOSCH | AXIS COMMUNICATIONS | sparsh cctv | MATRIX TELECOM | SECURITY | Secureye

ENDPOINT SECURITY
Endpoints Matter in Cybersecurity

MARKET TRENDS

- The India endpoint protection market generated a revenue of **$146.7 million** in **2023** and is expected to reach **$342.0 million** by **2030**, according to Grand View Research. It is expected to grow at a **CAGR of 12.8%** from **2024** to **2030**.
- Emerging technologies, such as cloud, Artificial Intelligence (AI), the Internet of Things (IoT), are immensely integrated with the endpoint security solutions.
- Many organizations having a mix of legacy systems, more number of endpoints, various Operating Systems, is making protection harder.

GROWTH FACTORS

- As cyber adversaries constantly adapt newer tactics and with more sophisticated attacks, organizations are seen investing in advanced technologies to protect their endpoints effectively.
- Endpoint security is becoming critical as more devices (laptops, mobile, tablets) are being used outside secure perimeters, increasing the attack surface.
- The regulatory landscape plays a pivotal role in driving the endpoint security market forward. Stricter data protection regulations and compliance requirements mandate organizations to implement comprehensive endpoint security measures.
- The CrowdStrike outage in 2024 essentially highlighted critical internal vulnerabilities, emphasizing the need for organizations to prioritize their spending on endpoint security.

KEY VENDORS

CROWDSTRIKE | SentinelOne | SOPHOS | kaspersky | Symantec by Broadcom | CHECK POINT | CISCO | paloalto CORTEX XDR | eset

ENTERPRISE MOBILITY
Mobility at the Core of Remote Work

MARKET TRENDS

- The India enterprise mobility management market size reached **$813.9 Million** in **2024**. IMARC Group expects the market to reach **$3,109.8 Million** by **2033**, exhibiting a growth rate of **16.06%** during **2025-2033**.
- Companies are addressing security concerns by implementing advanced techniques to mitigate these issues.
- Rapid digital transformation of Indian enterprises has elevated the need for robust security frameworks within enterprise mobility management.

GROWTH FACTORS

- With many companies maintaining hybrid models post-pandemic, enterprises are rapidly adopting enterprise mobility to boost productivity and enhance operational efficiencies.
- Bring Your Own Device (BYOD) increases complexity and risk around security, compliance, device/app management and has significantly contributed to the growth of the enterprise mobility market.
- Better mobile networks (4G/5G), increased smartphone penetration, improved broadband/mobile data availability helping in enabling enterprise mobility.
- Data breaches, regulatory requirements, internal policies forcing organizations to invest in better enterprise mobility solutions.

KEY VENDORS

vmware, SAP, Microsoft, IBM, BlackBerry UEM, citrix, cisco, SOTI, ZOHO

ERP
SMEs Powering the Next Wave of ERP Growth

MARKET TRENDS

- According to Grand View Research, the ERP software market in India in **2023** was **$2,799.7 million**, and is expected to grow to **$7,805.7 million** by **2030**, with a **CAGR** of **15.8%** from **2024-2030**.
- ERP systems are increasingly embedding AI/ML, predictive analytics, IoT (especially in manufacturing/distribution) for things like predictive maintenance, demand forecasting, real time monitoring.
- ERP systems are coming with in-built regulatory & compliance features as new GST reforms, accounting standards, etc., require ERP vendors to be up to date.
- ERP solutions have also expanded their reach to support many business functions, from back-end processes like accounting, HR, procurement and manufacturing to front-office functions such as sales force automation, marketing automation and ecommerce.

GROWTH FACTORS

- Many Indian businesses (large + medium + SMEs) are increasingly adopting ERP systems to streamline operations, reduce redundancy, and improve efficiencies.
- Government programs (Digital India, Make in India), regulatory compliance, and supply chain improvements are impetus for this growth.
- Cloud based ERP is gaining popularity over traditional on premise systems due to lower upfront costs, scalability, flexibility, and easier access to updates & integrations.

KEY VENDORS

SAP, ORACLE, Microsoft, Tally POWER OF SIMPLICITY, infor, ZOHO, ramco

ETHERNET SWITCHES

Ethernet Switches Powering Ahead with Innovation

MARKET TRENDS

- The ethernet switches market will grow from **$5.44 billion** in **2024** to **$7.62 billion** in **2025** at a compound annual growth rate **(CAGR)** of **7.8%**, according to Research And Markets.
- According to IDC, the worldwide Ethernet switch market recorded $11.7 billion in revenue in the first quarter of 2025 (1Q25), fueled by strong growth in the datacenter market.
- Ethernet switches hold the largest share in India's enterprise networking equipment market.
- The need for multi-gigabit speeds is increasing, particularly in data centers, to support new, business-critical applications.

GROWTH FACTORS

- The growth of this market is led by the demand for bandwidth and high data speed continuously increasing along with growing numbers of internet users across the globe.
- India's growing demand for cloud services, hyperscalers, and more local data center capacity are driving demand for higher performance, higher port density switches.
- Ongoing upgrades of enterprise campus and data center networks are a primary growth driver.
- The demand for PoE (Power over Ethernet) switch is growing, largely due to applications like IP cameras, access points, smart building sensors.
- The adoption of switches with advanced features will likely continue to grow.

KEY VENDORS

Cisco | Hewlett Packard Enterprise | Arista | Dell Technologies | Extreme Networks | Broadcom | Alcatel-Lucent Enterprise | D-Link | tp-link | Tejas Networks

FIREWALL

Next-Gen Firewalls Powering Strong Growth

MARKET TRENDS

- The Next Generation Firewall (NGFW) market in India is forecasted to grow at a **CAGR of 14.4%** from **2023** to **2030**, reaching about **$811.9 million** by **2030**, according to Grand View Research.
- The rise in security breaches and sophisticated cyberattacks, including zero-day exploits, persistent threats, malware, and ransomware are driving the growth of this market.
- Technological innovation and advancement will further optimize the performance of the firewall market.
- Firewalls are increasingly seen as part of a larger security ecosystem - zero trust, SASE (Secure Access Service Edge), intrusion detection / prevention, identity & access management, etc.
- In coming times, there will likely be more emphasis on integrated security frameworks (firewalls + SASE + zero trust + identity).

FOCUS INDUSTRIES

BFSI, E-commerce & Retail, Information Technology, Telecommunication, Manufacturing, Healthcare, Media & Entertainment, Education, Travel and Logistics. Smaller companies are catching up slowly.

GROWTH FACTORS

- Traditional firewalls are being supplemented or replaced by NGFWs and cloud/virtual firewalls that can handle modern threats, inspect deep packets, integrate with cloud services, IoT, etc.
- Since there is a shortage of specialized cybersecurity skills, there is a growing demand for managed firewall services in many organizations, where vendors manage policy, monitoring, updates, etc.

KEY VENDORS

paloalto | Fortinet | Check Point | Cisco | Juniper Networks | Sophos | SonicWall | Forcepoint | Seqrite

GRAPHIC CARD

Gaming & Content Creation Powering GPU Growth

MARKET TRENDS

- The global graphics card market size was valued at **$20.22 billion** in **2024** and is projected to grow from **$23.57 billion** in **2025** to **$75.95 billion** by **2032**, exhibiting a **CAGR** of **18.2%**, according to Fortune Business Insights.
- Graphics Processing Units (GPUs) are now essential far beyond gaming—powering AI and machine learning through parallel data processing, enabling realistic content creation, supporting scientific simulations, and driving cloud computing to handle data-heavy services across industries.
- Increasing investments and advancements in game development leading to a higher demand for high-graphics capabilities.
- The expansion of cloud gaming is helping the graphics card manufacturers to create an opportunity in this market. Popularity of Cloud Gaming Services, such as Google Stadia, Microsoft Xbox Cloud Gaming, and Amazon Luna, is expected to create graphics card market growth opportunities in the coming years.

GROWTH FACTORS

- The demand for graphics cards is rising due to advancements in gaming and content creation technology. The market is driven by increasing interest in immersive video games alongside Virtual Reality (VR) and Augmented Reality (AR) applications.
- The rise in demand for advanced computing power required by AI applications is also driving the market.
- Despite AI chips surpassing GPUs in performance and energy efficiency, GPUs will remain integral to high-performance computing due to their solid general-purpose computing capability.
- Graphic cards are essential in the processing power required for cryptocurrencies, facilitating smooth gaming experiences.

KEY VENDORS

NVIDIA | AMD | intel | ASUS | msi

HARD DISK DRIVE (HDD)

HDD Innovation Sparks Market Excitement in India

MARKET TRENDS

- While the Indian hard disk drive (HDD) market size was estimated at **5.88 ($Billion)** in **2023**, it is expected to grow from **6.5($ Billion)** in **2024** to **10.5 ($ Billion)** by **2035**.
- Although many PCs, laptops now use SSDs as primary storage, many systems (desktops, external storage, secondary backups) still use HDDs.
- Issues around illegal/refurbished drives being imported raise concerns about data security, product quality, and regulatory enforcement.
- Besides smartphones and PCs, HDD applications are fast expanding across other consumer electronic devices, such as surveillance camera systems, gaming consoles, and standalone portable storage devices.

GROWTH FACTORS

- Expansion in cloud computing, data centers, and the digital content industry are some of the major drivers of the market.
- As more data is generated (from AI/ML, video content, surveillance, cloud services, etc.), there is increased demand for large-capacity storage.
- HDDs are still cost-effective per TB compared with many SSDs for archival storage, and hence it is fueling the market growth. Indian market being price sensitive, HDDs often win where high capacity at low cost is needed vs premium performance SSDs.
- The growth of the HDD market is expected to be further enhanced by the increasing investments in the development of the semiconductor industry.

KEY VENDORS

SEAGATE | WD | TOSHIBA

HYPER-CONVERGED INFRASTRUCTURE (HCI)

HCI Powers the Future of IT Management

MARKET TRENDS

- The Hyper-Converged Infrastructure Market (HCI) size is estimated at **$13.37 billion** in **2024**, and is expected to reach **$40.97 billion** by **2029**, according to a survey by Mordor Intelligence.
- Industries that handle high data, strict uptime, or regulatory/compliance requirements (banks, financial institutions, insurance, healthcare, public sector) are more likely to adopt HCI systems.
- Key drivers include rising digital transformation, demand for simplified IT operations, scalability, reduced operational and capital expenses, and increased usage across sectors like healthcare, retail, and data centers.

GROWTH FACTORS

- Growth in cloud usage, expansion of data centers (both hyperscale, enterprise, and edge) pushes demand for scalable infrastructure, and thereby HCI.
- With most enterprises going for hybrid solutions or on premises control with cloud like features, HCI systems are often the answer.
- As enterprises seek ways to reduce IT expenditure (both operational and capital), HCI offers a more efficient alternative by integrating hardware and software.
- Enterprises sought ways to reduce IT expenditure (both operational and capital), and HCI offers a more efficient alternative by integrating hardware and software.
- With the technology advances – IoT, AI/ML workloads, virtualization, and the push for remote work/VDI will require flexible, integrated infrastructure platforms.

KEY VENDORS

NUTANIX | vmware | Hewlett Packard Enterprise | DELL Technologies | CISCO | NetApp | Microsoft

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INKJET/INK TANK PRINTER

Boost in Premium Printing Fuels Market Growth

MARKET TRENDS

- The Indian Ink Tank/Inkjet printer market showed robust growth in 2024, driven by demand from e-commerce and SMEs, high-quality printing needs, and technological advancements.
- The India inkjet printer market size stands at **$47.59 billion** in **2025** and is expected to reach **$59.34 billion** by **2030**, registering a **4.51% CAGR** over the period, according to Mordor Intelligence.
- Market trends however, indicated increasing adoption of ink tank technology for lower running costs, and reduced need for frequent ink replacement. Expansion of large format inkjet printers seen into sectors like packaging and textiles; especially the surge in online businesses fueled the demand for inkjet printers for packaging, shipping labels, and promotional materials.
- Demand from the non-commercial segment is projected to remain low, whereas commercial demand is likely to remain high.

GROWTH FACTORS

- Hybrid work/remote learning have pushed demand from home users, students, and small businesses for home printers.
- Consumers increasingly making printer purchases online as they find better variety and pricing, with access to more models, easier comparisons, and periodic online discounts (especially during festivals).
- Continuous innovations both in ink tank and inkjet technology led to faster print speeds and improved color accuracy.
- Production-linked incentives (PLI) and import-duty offsets drive printer vendors like Canon and HP to ramp up their output by manufacturing more in India.

KEY VENDORS

hp | Canon | EPSON | brother at your side | RICOH imagine. change. | PANTUM

IOT /OT SECURITY

Advanced IoT & OT Security: A Must in the Cyber Era

MARKET TRENDS

- The global Operational Technology (OT) Security Market is projected to reach **$84.2 billion** by **2032**, growing at a **CAGR** of **19%** from **2023 to 2032**, according to Allied Market Research.
- The India IoT security market size is projected to grow at a CAGR of 24.00% between 2025 and 2034 to reach nearly USD 6.30 billion by 2034.
- What still limits growth in this space is the dearth of trained security staff to analyze OT security systems and the high installation cost of OT security solutions.

GROWTH FACTORS

- Increasing frequency of intrusions that impact both IoT and OT systems driving the market for these security solutions. More attack vectors like phishing, compromised email, mobile device breaches, web compromise, remote access have also been exploited.
- As India embraces digital transformation, IoT technologies are becoming essential in sectors like healthcare, manufacturing, smart cities, and agriculture, creating a need for enhanced security measures to combat evolving cyber threats.
- Industry 4.0, smart manufacturing, automation, robotics, remote monitoring is increasing the number of OT/IoT devices in industrial environments, resulting in more attack surface.
- As OT security incidents often lead to physical disruptions, production stoppages, safety risks, this is pushing for more spending in OT security.

KEY VENDORS

LASER PRINTER

MFPs: Powering the Laser Printer Market

MARKET TRENDS

- The India laser printer market generated a revenue of **USD 489.6 million** in **2024** and is expected to reach **$722.6 million** by **2030**, according to Grand View Research.
- The growing popularity of multi-function printers (MFPs) is driving the demand for the global laser printer market, with MFPs), with the segment being the largest revenue generating in 2024.
- Single function laser printers are also used, especially for basic text printing needs.
- Laser printers are seen as more rugged, especially for high volume text printing.
- Printer companies are investing in R&D and strategic partnerships to maintain market competitiveness.

GROWTH FACTORS

- Fast printing, long life, speed, machine stability, high efficiency, lower paper quality requirements, user-friendly handling, and noiseless machines are factors resulting in the growth of the laser printers.
- Rapid economic development and the increasing adoption of digital technologies across India are fueling demand for reliable laser printing solutions.
- Laser printers with WiFi, duplex printing, network features, mobile printing support, integration of cloud data storage etc. are raising the bar, with such features helping in adoption in small businesses and hybrid home office setups.

FOCUS INDUSTRIES

Manufacturing, Retail, Healthcare, Banking, Insurance, Government, and Education

KEY VENDORS

MANAGED PRINT SERVICES (MPS)

Cut Print Costs with Managed Services

MARKET TRENDS

- Managed Print Services (MPS) are becoming essential for organisations of all sizes, offering a streamlined approach to optimise and manage printing infrastructure. Now integral to modern business operations, the MPS market is projected to grow at a **CAGR of 8.52%** from **2024 to 2029**.
- The MPS market is anticipated to cross a value of **$319.5 billion** by **2033**, while gradually evolving over time, according to Future Market Insights.
- The MPS deployment model has bifurcated the print services market into cloud and on premise. The cloud segment continues to dominate the market and is projected to be the faster-growing segment.
- MPS also offers enhanced security features which helps protect the valuable information from network branches.

GROWTH FACTORS

- Since organizations want to reduce total cost of ownership of printing – devices, supplies, maintenance, energy, paper, MPS helps by consolidating devices, optimizing usage, and reducing waste.
- IT teams have fewer device-related issues, with remote management, monitoring, and companies reducing downtime.
- More small/medium businesses are realizing the benefit of outsourcing print management rather than managing themselves.
- Major printer/ imaging vendors and system integrators are pushing MPS, offering services across devices, supplies, and support. Channel partners see MPS as a recurring revenue stream.
- Lower paper usage, less wastage, energy-efficient devices, recycled supplies etc. are gaining importance.

KEY VENDORS

xerox | RICOH imagine. change. | hp | Canon | KONICA MINOLTA | wepsol

OPEN SOURCE

Indian Enterprises Turn to Open Source for AI Edge

MARKET TRENDS

- The India Open Source services market in **2023** was about **$1,209.9 million**, according to Grand View Research. It is forecast to grow at a CAGR of **18.2%** from **2024 to 2030**, reaching about **$3,901.1 million** by **2030**.
- The rapid expansion of open source in India has significantly heightened investment interest in Indian startups, making them more appealing to venture capitalists globally.
- Contributions to open source from Indian developers are increasing with new repositories, more public contributions, and more first-time open source contributors.
- The increasing adoption of open AI models is reshaping intelligence analysis, cybersecurity, and governance.

GROWTH FACTORS

- Open source offers a flexible and cost-effective platform for developing and deploying AI and ML solutions, without the need for organizations for significant investment in proprietary software.
- The increasing adoption of open AI models is reshaping intelligence analysis, cybersecurity, and governance.
- Startups, SaaS companies, and cloud migrations are preferring open source for speed, modularity, and cost effectiveness.

FOCUS INDUSTRIES

Large enterprises, SMEs across several verticals, including IT and ITeS, Transportation & Logistics, Telecommunications, BFSI, Manufacturing, Healthcare & Life Sciences, consumer goods and Retail.

KEY VENDORS

Red Hat | SUSE | Canonical | ORACLE Linux | elastic | HashiCorp

PC MARKET

Make in India to Shape PC Market

MARKET TRENDS

- The Indian PC market (excluding tablets) remained relatively flat with vendors focusing on clearing excess inventory and normalizing stock levels.
- The commercial segment was bolstered by government tenders that were expedited ahead of the elections, while the SMB sector saw growth due to a few deals closing at the end of the quarter, according to a report by Canalys.
- As per IDC, PC shipments in India touched 14.4 million units in 2024, up 3.8 percent YoY. This includes 4.5 percent YoY growth in shipments of notebooks and 1.8 percent YoY in shipments of desktops.
- HP grabbed the lion's share of domestic PC shipment, while Lenovo secured the second spot followed by Dell.
- Desktops, like earlier years, are declining or showing low growth with notebooks (portable PCs) dominating the current growth.

GROWTH FACTORS

- India's PC market is set for robust growth, fueled by enterprise refresh cycles, expanding AI adoption, and rising demand from smaller cities, with shipments projected to rise 7% to 15 million units in 2025.
- PC buyers in India increasingly want higher specs (GPUs, better CPUs, more memory) for gaming, content creation, and AI workloads, and hence the demand for premium notebooks.
- End-of-year (festive) sales, online discounts, etc., boosting consumer segment shipments.
- Manufacturing & "Make in India" incentives may begin to play more of a role, with local assembly/manufacturing increase, which could affect pricing and brand strategy.

KEY VENDORS

hp | DELL Technologies | Lenovo | acer | Apple | ASUS

POINT OF SALE (POS)

POS Boom Driven by Payment Innovation

MARKET TRENDS

- The India POS Terminals market size stood at **$37.08 billion** in **2025** and is projected to reach **$63.88 billion** by **2030**, translating into an **11.49% CAGR**, according to Mordor Intelligence.
- The market is witnessing significant demand with banks procuring a large number of POS terminals.
- The market saw a significant shift towards mobile POS (mPOS) devices and portable units, making up a large portion of the total market share.
- There is a clear trend toward contactless payment solutions, along with contact-based systems which is a significant growth driver for the future.
- High installation and maintenance costs, along with security concerns related to theft, are hindering steady market growth.

GROWTH FACTORS

- As AI, cloud, and contactless payments advance, POS systems are set to play a central role—helping businesses optimize operations, elevate customer experience, and stay competitive.
- Government programs (Digital India etc.), emphasis on financial inclusion, demonetization after-effects, and RBI regulations pushing for digital acceptance, especially in underbanked or cash-heavy sectors driving the POS market.
- Small and medium businesses increasingly adopt POS / mobile POS for ease, efficiency, and better customer experience.
- Growth of organized retail chains, supermarkets, e-commerce/omni-commerce are demanding unified POS solutions.
- Industries driving the POS market are retail, healthcare, hospitality, warehousing, and distribution.

KEY VENDORS

EPSON | verifone | TVS Electronics | pine labs | wepsol | VISIONTEK

PROJECTOR

Classrooms, SMBs & Homes Fuel Projector Boom

MARKET TRENDS

- The global portable projector market is expected to reach a value of **$21.72 billion** by **2028**, at a **CAGR** of **4.8%,** according to GlobeNewswire.
- The demand for 3D projectors is expected to increase at a global level owing to the significant rise in the use of the 3D technology in areas such as cinema, education, home theater, business presentations, and event management.
- Challenges such as high installation costs and a lack of awareness continue to be concerns for projector vendors.
- The market in India remains highly fragmented, with numerous brands competing across different categories.

GROWTH FACTORS

- Schools, colleges are investing in projectors more aggressively to enable digital learning, and interactive & immersive education. Government initiatives like Digital India further pushing this.
- Demand from offices, meetings, training, conferences for higher resolution, portable & wireless projectors and hybrid working increasing the need for better visual communication tools.
- Increased interest in projectors among home users wanting home theaters, large screen displays, especially in non-urban areas with enough space and ambient lighting improvements.

FOCUS INDUSTRIES

IT, corporate, media & entertainment, rental, BPO and education sectors.

KEY VENDORS

EPSON, BenQ, acer, InFocus, Optoma, Panasonic, E GATE, ViewSonic, GLOBUS

ROBOTIC PROCESS AUTOMATION (RPA)

Automation Driving Cost & Error Reduction

MARKET TRENDS

- The Indian RPA market showed significant growth in 2024, with a Grand View Research report estimating it at **$73.4 million** in **2024**; it is projected to reach **$729.1 million** by **2030.**
- The Banking, Financial Services, and Insurance (BFSI) sector is a major adopter, using RPA for tasks like customer onboarding, loan processing, and regulatory compliance.
- Businesses are increasingly leveraging RPA to automate repetitive, rule-based tasks to enhance productivity, reduce operational costs, and improve accuracy.
- SMEs are adopting cloud-based RPA solutions for affordability and ease of deployment to remain competitive and optimize resources.
- The move beyond just RPA bots to combining RPA + AI/ML + process mining etc, will automate more end-to-end and intelligent workflows.
- There will be more adoption of cloud-hosted RPA tools because of scalability, lower entry cost, faster deployment.

GROWTH FACTORS

- Low-code / No-code platform tools will allow non-technical staff to build simple automations themselves, reducing dependency on IT teams.
- Repetitive processes like reporting & administration, payroll, data extraction / migration, customer support, compliance etc., are among the earliest and biggest use-cases of RPA.
- Instead of automating just for tech's sake, companies are prioritizing automations that reduce cost, error, manual workload, speed up processes, compliance etc.

KEY VENDORS

UiPath, Automation Anywhere, SAP, IBM, Microsoft

ROUTER

India's Router Market Rides the Digital Wave

MARKET TRENDS

- The India router market size reached **$873.8 Million** in **2024**, according to IMARC Group and it expects the market to reach **$1,733.4 Million** by **2033**, exhibiting a growth rate **(CAGR)** of **7.32%**.
- Telecom Service providers are seen investing heavily in routers as part of upgrading to offer 5G network supported services.
- Other key verticals for routing include finance, government, and services.
- In urban areas, while demand is for higher-end routers, in rural & semi-urban areas, the demand is for reliable, affordable models.
- Wireless routers are emerging as the go-to option for Indian homes and enterprises in place of traditional cabled configurations.

GROWTH FACTORS

- The router market in India is growing owing to the increased use of the internet, more broadband subscriptions, expanding digital infrastructure, and the requirement for seamless and dependable connectivity across industrial, commercial, and residential segments.
- There is an increasing demand for high bandwidth usage at home (video calls, streaming, gaming, multiple connected devices), pushing people to upgrade from basic routers.
- As governments invest in fiber, broadband backbone, rural connectivity, there arises demand for router hardware both at the user end and for enterprise networks.

KEY VENDORS

Cisco | HPE Aruba Networking | Juniper Networks | Ciena | Huawei | Arista | Fortinet | tp-link | Sophos | Tejas Networks

SERVER (X86/NON X86)

Server Market Set to Scale New Heights

MARKET TRENDS

- A key trend shaping the India server market is the transition towards edge computing and decentralized server systems.
- In its Magic Quadrant for Enterprise Storage, Gartner stated that by 2028, more than 20% of enterprises will run AI workloads (training and/or inference) in on-premises data centers.
- By 2029, consumption-based storage as a service (STaaS) will replace 50% of on-premises enterprise storage and data services infrastructure capital expenditure (capex).
- By 2029, 100% of storage products will include cyber storage capabilities focused on active defense beyond recovery from cyber events, up from 20% in early 2025.
- While Dell maintains its stronghold, HPE and IBM are aggressively expanding their capabilities to challenge the market leader.

GROWTH FACTORS

- India's server market is growing due to digital transformation, increased cloud adoption, and government initiatives like Digital India.
- Key opportunities arise in sectors like healthcare and finance, with a shift towards edge computing and 5G enhancing server demand despite high initial costs.
- Programs like Digital India and Ayushman Bharat Digital Mission are promoting localized data handling, encouraging investment in domestic server setups.
- With startups and SMEs also digitizing, the demand for advanced servers continues to rise.

KEY VENDORS

Dell Technologies | Hewlett Packard Enterprise | Cisco | Lenovo | Fujitsu | Huawei | Supermicro

SOFTWARE-DEFINED WIDE REA NETWORK (SD-WAN)

SD-WAN to Redefine India's Network Future

MARKET TRENDS

- The global software-defined wide area network (SD-WAN) market is poised for significant growth, expanding from **$5,362.2 Million** in **2024** to **$80,910.1 Million** by **2034**, according to Future Market Insights.
- The India SD-WAN market is expected to see strong growth in the coming years, driven by digital transformation initiatives, cloud adoption, and the need for secure, efficient network connectivity.
- While challenges such as high implementation costs, integration with legacy systems, and a shortage of skilled workforce exist, advancements are making the technology more accessible for Small and Medium-sized Enterprises (SMEs).

GROWTH FACTORS

- India's rapidly expanding telecom sector requires SD-WAN to power emerging technologies and services such as 5G, cloud computing, and IoT.
- As industries increasingly adopt cloud technologies and remote work practices, the SD-WAN market is expected to experience robust growth, particularly in emerging markets.
- As enterprises migrate applications to the cloud, SD-WAN provides a robust solution to manage network traffic and ensure performance across diverse cloud environments.
- In the Asia-Pacific region, rapid urbanization and the expansion of digital economies are driving the demand for SD-WAN.
- Initiatives to improve digital infrastructure, broadband penetration, data localization, regulatory expectations of network security are helping this market growth.
- Security threats and data compliance & protection are pushing for integrated security in SD-WAN.

KEY VENDORS

Cisco | HPE aruba networking | vmware | Fortinet | paloalto | Juniper Networks | Arista | SonicWall

SMARTPHONE

Smartphone Market Boosted by AI and Premium Demand

MARKET TRENDS

- India's 2025 smartphone market showed mixed performance, with some reports indicating growth in value, driven by AI features and growth in the entry-premium segment. Oher reports showed modest unit growth influenced by factors like a strong entry-premium segment and high 5G adoption.
- The market has rebounded from a two-quarter slump; however subdued consumer demand is expected to limit the pace of annual recovery.
- According to IDC, Apple maintained its strong performance, with shipments growing 21.5% YoY to 5.9 million units in the first half of 2025, and the iPhone 16 being the highest-shipped model across India in 1H25.
- Consumers are prioritizing devices with strong AI capabilities, driving demand for performance and advanced features.

GROWTH FACTORS

- Smartphone production in India is accelerating in scale and speed, powered by government initiatives like Make in India and the PLI scheme.
- With chipset prices falling, phones with 5G are becoming more affordable.
- Promotions, financing options, both offline and eCommerce are helping consumers afford higher end smartphones.
- India's policies like Make in India, PLI etc. have made local assembly & production more attractive, which helps reduce costs and sometimes import duty.
- People buying higher value phones with better cameras, design, features are driving this market.

KEY VENDORS

Samsung | mi | iPhone | vivo | oppo | Lenovo motorola | OnePlus

SOFTWARE DEFINED NETWORKING (SDN)

SDN Players Eye India's Lucrative Market

MARKET TRENDS

- The Software Defined Networking (SDN) market is projected to reach a valuation of **$95 Billion** by **2032**, with the projected market growth of **17.2%** from **2022 to 2032**, according to Future Market Insights.
- 5G rollout is driving SDN adoption in India, as its ultra-low latency, high throughput, and massive device connectivity needs surpass the limits of traditional hardware-centric networks, demanding programmable, flexible solutions.
- Since SDN technology virtualizes all components of the network infrastructure, an SDN controller can serve as an attractive attack surface, giving hackers the potential to manipulate and gain complete control over the entire network.

GROWTH FACTORS

- SDN's use of Application Programming Interfaces (APIs) allows for dynamic control and troubleshooting, which is key to modern digital transformation efforts in the region.
- As 5G networks expand, telecom operators need more flexible, software-driven network architectures for network slicing, dynamic bandwidth allocation, low latency, etc.
- Enterprises want to reduce manual configuration, respond faster to changes, optimize resource usage, and improve visibility, and thus SDN helps with orchestration, virtualization, dynamic provisioning etc.
- As cyber threats evolve quickly and the need for real-time responses rises, organizations are turning to SDN solutions that provide centralized control and detailed security policies.
- SDN solutions provide more flexibility in terms of traffic management to the operator for improving the efficiency of the network that has become enormous in terms of both size and complexity.

KEY VENDORS

CISCO | vmware by Broadcom | ARISTA | HPE aruba networking | Alcatel-Lucent Enterprise | ciena | VERSA NETWORKS

SOFTWARE DEFINED SECURITY (SDS)

SDS Market Soars with Automation & Scalability

MARKET TRENDS

- The global Software Defined Security (SDS) market size is expected to grow at **33.5%**, reaching nearly **$68.02 Billion** by **2029**, according to Maximize Market Research.
- The shortage of technical expertise is likely to hinder the growth of this market, leading to more difficult and expensive initial installations, limited customization options, and complex network management.
- As there are lack of industry regulations, various companies are avoiding the use of SDS which is expected to restrain the growth of the market.
- Fueled by the increasing demand for agile, automated, and scalable security solutions, SDS finds adoption in BFSI and Telecom & IT.

GROWTH FACTORS

- The market is growing as businesses face more sophisticated cyber threats and need more flexible / adaptive solutions.
- As more workloads move to cloud/hybrid/multi-cloud environments, SDS enables virtualized security suitable for these environments.
- Data protection regulations, requirements for data localization, compliance with government cybersecurity norms push organizations toward stronger security controls and thereby adopt SDS.
- Organizations are concerned about the security of automated and virtualized infrastructure before using software defined networking, and this in return is boosting the growth of the SDS market opportunity.

KEY VENDORS

vmware | illumio | CISCO | FORTINET | zscaler | paloalto | CROWDSTRIKE | COLORTOKENS | CLOUDFLARE | AIRGAP

SOLID STATE DRIVE (SSD)

The market for SSDs look promising going forward

MARKET TRENDS

- Higher SSD demand is gradually starting to come from the enterprise market, with the future looking promising fueled by increasing demand for high performance computing.
- Declining prices and technological advancements are making SSDs more accessible.
- Many consumers don't fully understand the differences (e.g. SATA vs NVMe, DRAM vs DRAM-less) and so may buy mismatched products or under-performing ones.

GROWTH FACTORS

- The key factors driving this market include the increasing penetration of high-end computing, growing adoption of SSDs in data centres, and advantages SSDs enjoy over HDDs.
- Although the SATA sector remains the market leader, the high demand for SSDs with SATA interfaces is mainly due to their affordability.
- Businesses are moving workloads to cloud /hybrid/edge, increasing the need for fast, low latency storage, and hence the need for SSDs.
- More affordable NAND, higher density NAND, better interfaces (PCIe 4.0 / 5.0), and more efficient SSD controllers are made available.
- Data localization, sovereign cloud infrastructure, incentives for electronics/component manufacturing helping drive the demand.
- The increasing demand for SSDs is also driven by a rapidly growing digital economy and the widespread use of multimedia applications, which require faster and more reliable storage solutions.

KEY VENDORS

SanDisk | SAMSUNG | Micron | SEAGATE | Kingston | SK hynix

STORAGE

Storage Market Poised for Strong Growth

MARKET TRENDS

- As per IDC report, the external OEM enterprise storage systems (ESS) market reported annual growth of 3.6% in the fourth quarter of 2024, completing the year at 2.5% annual growth and $33.5 billion in spending.
- IDC expects that the recovery of the external ESS market will be pushed into 2025 as the strong growth in investments into computing infrastructure will start slowing down.
- Key trends included increased spending from government and manufacturing, a growing contribution from All-Flash Arrays (AFAs) and NVMe-based arrays, and a projected single-digit CAGR for the 2020-2025 period.
- As digitization advances and the number of active mobile users rises, the demand for data storage is anticipated to increase in the coming years, particularly in the Asia Pacific region.
- In India, revenue from storage systems is projected to grow at an annual rate of 8.27%, reaching a market volume of US$1.2 billion by 2028.

GROWTH FACTORS

- Many businesses are also seen migrating to newer technologies such as non-volatile memory express (NVMe), which uses AI and ML to access and store data.
- Advanced technologies have enabled the development of connected appliances and autonomous vehicles, leading IT infrastructure companies to choose the latest, cutting-edge storage solutions.

KEY VENDORS

DELL Technologies | Hewlett Packard Enterprise | NetApp | IBM | Hitachi Vantara | PURESTORAGE | Lenovo

STRUCTURED CABLING

5G & Data Centres Power Structured Cabling Growth

MARKET TRENDS

- The India structured cabling market size reached **$704.1 Million** in **2023**, and as forecasted by IMARC Group, the market will reach **$1,626.1 Million** by **2032**, exhibiting a **growth rate** of **9.75%**.
- The demand for structured cabling is primarily driven by the rising need for copper cabling, which is necessary for higher bandwidth and faster transmission rates.
- However, copper and fiber components are sensitive to global commodity price swings, which increase costs and affect margins.
- Moreover, upgrading older buildings or older cabling systems is more complicated and costly than in green-field projects

GROWTH FACTORS

- The demand is bolstered by the introduction of Wi-Fi services on trains, the growth of the data center industry, the expansion of 5G networks by telecom companies, and the increasing interest in intelligent buildings across the country.
- Commercial and Residential sectors upgrading or building new infrastructure needing high-bandwidth, smart building wiring is driving this market.
- The continual technological advancements and the advent of fifth-generation (5G) network channels are providing a boost to the demand for structured cabling systems across India.

FOCUS INDUSTRIES

IT, healthcare, education and the telecommunications segment.

KEY VENDORS

COMMSCOPE | Schneider Electric | R&M | D-Link | POLYCAB | DIGISOL

CCTV/SURVEILLANCE

Advanced IP Solutions Drive Surveillance Evolution

MARKET TRENDS

- The Indian video surveillance market has grown swiftly and attracted major international CCTV & security systems brands.
- The India CCTV Market size is estimated at **$3.98 billion** in **2024**, and is expected to reach **$10.17 billion** by **2029**, growing at a CAGR of **20.60%**, according to Mordor Intelligence.
- The IP-based surveillance system is expected to soon outclass the conventional, analogue method due to its sophistication and improved applications.
- The CCTV market has witnessed higher penetration in Tier 1 and 2 cities, with Government and Transportation accounting for the largest market share among the verticals.
- There is a push toward localization of manufacturing of surveillance products so that dependency on imports is reduced.
- Relentless innovation in surveillance and security networks has decreased the cost of surveillance products and increased their efficiency.

GROWTH FACTORS

- Smart Cities Mission, Safe City Projects, municipal surveillance, public safety infrastructure investments continue to propel the growth of this market.
- Laws and policies pushing for surveillance in public areas, transport hubs etc. is seen as another growth driver.
- Rapid growth of urban populations, increasing concerns about crime, vandalism, safety in public & private spaces boosting this market.

KEY VENDORS

CP PLUS | PRAMA | BOSCH | Godrej | sparsh cctv | Secureye | MATRIX TELECOM | SECURITY

UPS (On-Line/Off-Line)

UPS Growth Powers Through Competitive Landscape

MARKET TRENDS

- The Indian UPS market was valued at **$8.79 billion** in **2024**, per Astute Analytica. According to forecasts, it will grow at a CAGR of **~8–8.6%** through **2025-2033**, reaching about **$18.28 billion** by **2033**.
- Given the competitive landscape, the industry is prioritizing research and development to introduce more advanced products, one of which is the online UPS.
- The UPS market in India is very competitive and still very fragmented.
- A major challenge that UPS manufacturers face are the low-cost imports from China and Taiwan, as well as increasing raw-material prices.

GROWTH FACTORS

- Technological advancements in UPS systems, including artificial intelligence, machine learning, and IoT, are anticipated to create significant opportunities in the market.
- Frequent power outages, voltage fluctuations, and uneven grid infrastructure in many parts of India are major reasons organizations (and individuals) adopt UPS systems.
- The booming data center buildout, expansion of cloud services and digital transformation gives strong demand for UPS solutions.
- For data centers and larger setups, modular UPS that can scale up/down are favored.
- Increased use of home electronics, remote work setups, more frequent power cuts drive demand for smaller, lower-capacity UPS.

KEY VENDORS

Schneider Electric | VERTIV | EATON | DELTA | NUMERIC A Group brand legrand | BPE Strategic Power Solutions | Uniline

UTM (UNIFIED THREAT MANAGEMENT)

UTM Demand Soars as Cyber Threats Rise

MARKET TRENDS

- Unified Threat Management (UTM) is seen as an evolution of the traditional firewall, serving as a comprehensive security solution that can perform various functions, including gateway anti-spam, network firewalling, data leak prevention, network intrusion prevention, gateway antivirus, load balancing, on-appliance reporting, and content filtering.
- Asia-Pacific is expected to be one of the fastest-growing regions in UTM adoption, due to increasing cyber threats, cloud migration, regulatory push, and growing digitalization of enterprises & government services in countries like India.

GROWTH FACTORS

- The UTM market has witnessed considerable growth owing to the increasing number of cyberattacks and growing importance of cybersecurity across the globe.
- Small and Medium Enterprises (SMEs) are a major part of the adoption base, because UTM offers cost-efficiency by integrating multiple security functions (firewall, antivirus, IPS, etc.) in one device or solution.
- According to a report by 6WResearch, the India UTM market is expanding, with organizations in India increasingly seeking all-in-one security solutions to simplify their cybersecurity infrastructure.
- Data protection laws, government requirements for secure networks, especially for finance, healthcare, telecom will continue to drive this market.

KEY VENDORS

FORTINET | SOPHOS | CHECK POINT | CISCO | paloalto | SONICWALL

VIRTUALIZATION

Virtualization Boom Reshaping Indian Market

MARKET TRENDS

- As organizations increasingly consider digitizing and virtualizing their operations, virtualization has become a standard practice within an enterprise IT architecture.
- The virtualization market has experienced rapid maturation over the past few years.
- The market, both in India and globally, is seeing an increasing adoption of various types of virtualization - data, server, storage, desktop and application virtualization.
- Many enterprises have legacy on-prem systems that are not easy to virtualize as it involves migration costs and other risks.

GROWTH FACTORS

- Digital transformation, especially in IT services, telecom, BFSI, is accelerating virtualization.
- As Virtualization helps reduce hardware costs, improves resource utilization, cuts maintenance overhead, these gains are significant for SMEs.
- Virtualization technologies offer significant efficiency improvements, enabling IT departments to deploy resources quickly and scale infrastructure as needed.
- Government policies for digital inclusion, cloud infrastructure, growth of data centres, data localization etc., are helping create a favorable environment for virtualization.
- Edge computing and data centre virtualization are also getting a boost.
- Virtual desktop, data virtualization, and virtual networking are among the biggest revenue segments in 2024.

KEY VENDORS

NUTANIX | Microsoft | vmware | Red Hat | ORACLE | IBM

WI-FI

Wi-Fi Market Set to Soar on Quality Network Demand

MARKET TRENDS

- According to Future Market Insights, with a projected CAGR of 20.2% for the next ten years, the Wi-Fi market is predicted to reach a valuation of nearly **$88.90 billion** by the end of **2033**.
- Next-generation wireless technologies such as 5G and Wi-Fi 6, the latest generation of wireless standards, are poised to become a crucial part of the networks that link machines and people.
- The Managed Wi-Fi solutions market is another sector which is going to be driven by the need for high speed internet connectivity.
- However, in rural/tier-2/3 areas, getting consistent broadband/backhaul, stable electricity, etc. can be difficult.

GROWTH FACTORS

- More smartphones, tablets, laptops, smart devices (IoT etc.) mean more need for good Wi-Fi coverage.
- Remote/hybrid working, online education, higher bandwidth expectations inside homes and offices as well as increase in smart homes also drives the need for better home Wi-Fi and range extenders.
- The increasing number of Wi-Fi-enabled devices such as mobile phones, laptops, computers, iPads, and tablets are expected to further propel the market through 2025.
- Launch of Government and municipal Wi-Fi, public hotspots are helping coverage in public spaces (stations, airports, etc.).

KEY VENDORS

CISCO | aruba | Ruckus | ARISTA | Allied Telesis | D-Link | tp-link | NETGEAR

WORKSTATION

Surge in Workstation Usage Across Multiple Sectors

MARKET TRENDS

- Workstations are often more expensive units, and hence they are sold in smaller volumes as compared with general desktop/notebook PCs.
- Manufacturers of workstations are seen integrating advanced technologies like Virtual Reality (VR) and Augmented Reality (AR) in their offerings to create significant business opportunities.
- Although workstations are not the same as gaming PCs, there is sometimes an overlap.

GROWTH FACTORS

- A surge in the deployment of workstations is seen among different applications like engineering work, Forensics, medical diagnostics, and financial modeling.
- There has been an increase in demand for workstations among companies, small engineering architects, graphic designers, organizations, departments, or individuals that require swifter microprocessors. As some users move to more demanding applications, standard desktops or notebooks may not suffice.
- The manufacturing industry in the country and the eventual adoption of CAD for 3D animation in manufacturing and construction industries will further fuel the workstation market.
- As high performance GPUs, CPUs, storage, etc. become more accessible, it becomes easier for users/businesses to invest in workstation machines..

KEY VENDORS

hp | DELL Technologies | Lenovo | acer | Apple

ZERO TRUST SECURITY

Zero Trust Emerges as the Future of Enterprise Security

MARKET TRENDS

- In **2024**, the India Zero Trust Security market was about **$1,615.8 million**, according to Grand View Research.
- In the context of rapid digital transformation, IT leaders view zero trust as the optimal framework for securing enterprise users in an increasingly distributed, cloud-based, and mobile-centric environment.

GROWTH FACTORS

- Enterprises are increasingly becoming aware of the importance of a zero-trust environment for protecting their critical data.
- Frequent data breaches, insider threats, ransomware etc. make perimeter-based defenses less effective, prompting organizations to adopt "never trust, always verify" models.
- As more business workloads move to cloud and remote/hybrid working becomes more standard, securing devices, and access becomes more complex, and hence zero trust models become more required.

FOCUS INDUSTRIES

- Several industries in India have successfully implemented zero-trust security solutions and services, majorly in BFSI and IT sectors.
- Zero trust security has witnessed growth in the IT & Telecom industry as well.

KEY VENDORS

Microsoft | CISCO | okta | CYBERARK | IBM | zscaler | Forcepoint | InstaSafe