

## Union Budget 2025

### Catalyzing Growth in India's IT and Channel Ecosystem

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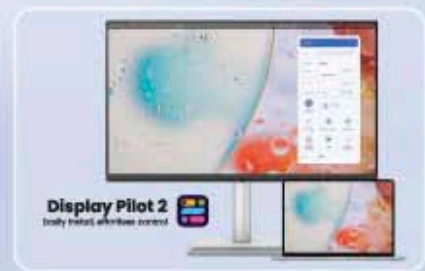
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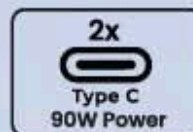
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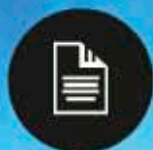
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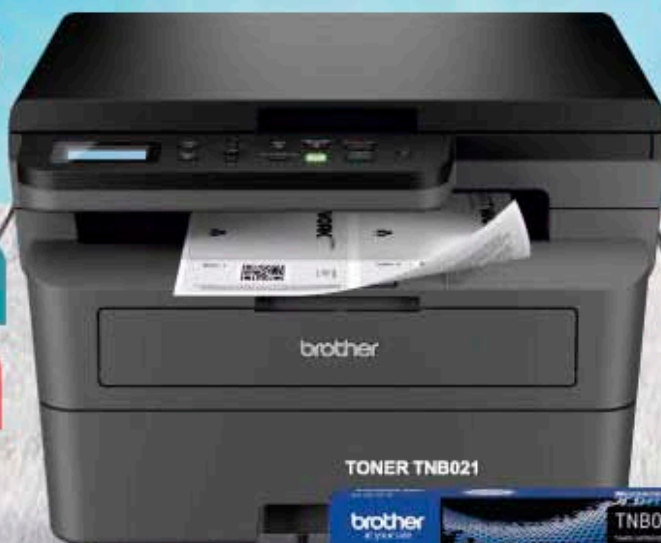
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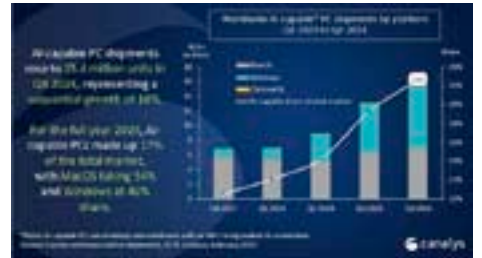


### Union Budget 2025: Catalyzing Growth in India's IT and Channel Ecosystem

- Shepherd partners with Intel to enhance its endpoint protection suite with hardware-based ransomware detection
- Fortinet Evolves FortiAnalyzer into a Turnkey AI-Driven SecOps Platform for Resource-Constrained Security Teams



- CrowdStrike Falcon® Cloud Security Supported on Oracle Cloud Infrastructure
- AI-capable PC shipment share rises to 23% in Q4 2024



- Intel Unveils High-Performance, Power-Efficient Ethernet Solutions to Optimize Network Infrastructure
- The Tech Industry in India likely to reach milestone \$300Bn Revenue in FY2026: Nasscom Annual Strategic Review 2025



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Netskope extends data security capabilities with enhanced Enterprise Browser



Measuring AI & Data Analytics Impact – A Key Challenge for CDAOs, Finds Gartner Survey



- OpenText Expands Cybersecurity Portfolio with AI-Powered OpenText Core Threat Detection and Response



- TechnoBind and Kaspersky Forge Strategic Alliance to Strengthen India's Cybersecurity Landscape



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# UNION BUDGET 2025

## Union Budget 2025: Catalyzing Growth in India's IT and Channel Ecosystem

*The Union Budget 2025 lays the foundation for India's digital transformation, with a strong push for AI, cloud computing, cybersecurity, and IT infrastructure. Key highlights include ₹20,000 crore for AI startups, tax incentives for MSMEs, ₹11.2 trillion for IT infrastructure, and skilling 1M+ professionals. Read expert analysis on how this budget shapes the future for IT service providers, channel partners, and startups..*

Kalpana Singhal



# UNION BUDGET

The Union Budget 2025, unveiled by Finance Minister Nirmala Sitharaman, delineates a comprehensive roadmap aimed at propelling India's digital economy. With a pronounced emphasis on Artificial Intelligence (AI), cloud computing, cybersecurity, and robust IT infrastructure, the budget introduces a series of strategic initiatives poised to redefine the landscape for IT innovators, service providers, channel partners, and technopreneurs.

## Strategic Initiatives Shaping the IT and Channel Industry

### 1. Amplifying AI and Emerging Technologies

In a decisive move to position India at the forefront of technological innovation, the government has earmarked a ₹20,000 Crore Fund of Funds dedicated to AI and deep

tech startups. This initiative encompasses:

- Development of Indigenous AI Models: Fostering the creation of homegrown Large Language Models (LLMs) tailored to cater to diverse Indian languages and dialects, thereby

enhancing accessibility and inclusivity.

- Promotion of AI Integration Across Sectors: Encouraging the adoption of AI-driven solutions in sectors such as healthcare, agriculture, and education to enhance efficiency and outcomes.
- Establishment of

Collaborative Ecosystems: Facilitating partnerships among startups, academic institutions, and industry leaders to accelerate AI research, development, and deployment.

The launch of the IndiaAI Mission under this framework is set to galvanize the AI landscape, offering IT service providers and channel partners avenues to develop and implement AI-centric solutions across various industries.

Complementing this, an allocation of ₹7,500 crore is designated for the enhancement of national data centers and the fortification of AI-driven cybersecurity frameworks. This investment aims to bolster data sovereignty and security, presenting opportunities for enterprises specializing in data management and cybersecurity services.



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## 2. Empowering MSMEs and IT Solution Providers

Recognizing the pivotal role of Micro, Small, and Medium Enterprises (MSMEs) in economic growth, the budget introduces several measures to alleviate operational challenges:

fostering a conducive environment for innovation.

- Streamlined Access to Capital: Implementation of mechanisms to expedite IT loan processing by 50%, ensuring timely financial support for business expansion and

costs for system integrators and resellers, thereby enhancing competitiveness.

The government is offering subsidies to software development firms and tech startups, promoting the creation and adoption of indigenous IT products.

international offerings. Additionally, the government is incentivizing IT-based MSMEs by providing tax breaks and investment credits to those engaged in cloud computing, cybersecurity solutions, and AI-powered business tools.

NASSCOM has welcomed the rationalization of tax policies, including the simplification of international taxation through a three-year block period for Arm's Length Price (ALP) determination, easing compliance for multinational businesses.

### NASSCOM has also highlighted key budget wins:

- Simplification of tax deduction at source (TDS) provisions to improve ease of business.
- Recognition of Deep Tech as a strategic sector, ensuring sustained investments.
- Expanding international competitiveness by introducing Bharat Trade Net, streamlining international trade and customs processes.



- Tax Incentives: Extension of tax benefits to MSMEs and startups, providing financial relief and

technological upgrades.

- Reduction in Import Duties: Lowering import tariffs on essential IT hardware to reduce

This strategy is anticipated to stimulate demand for local solutions, enabling channel partners to present competitive alternatives to



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### 3. Fortifying IT Infrastructure and Advancing the Digital Bharat Vision

The budget commits ₹11.2 trillion towards infrastructure development, with a significant portion allocated to the IT sector:

- technology to ensure seamless and high-speed connectivity nationwide.
- Bridging the Digital Divide: Investing in rural broadband initiatives to connect underserved regions, thereby promoting inclusive growth and access to

enhancing operational efficiency and scalability.

- Promotion of green data centers and energy-efficient IT infrastructure.

With incentives for private players investing in digital infrastructure,

Furthermore, the push for green IT initiatives includes tax benefits and subsidies for organizations adopting sustainable IT practices, such as energy-efficient data centers and low-power AI hardware.

In line with its ambition to become a global financial hub, the government has made reforms in GIFT City, continuing its efforts to enhance India's financial ecosystem with rationalized incentives and an extended sunset period for financial services, improving the appeal for global investors.

NASSCOM has also praised the introduction of a National Framework for Global Capability Centres (GCCs), which will help expand GCC operations into tier-2 cities, ensuring greater talent availability and infrastructure support for multinational corporations setting up operations in India.

These initiatives are poised to create a fertile ground for IT solution providers, Managed Service Providers (MSPs), and Value-Added Resellers (VARs) and GCCs to offer a spectrum of services ranging from networking solutions to comprehensive digital transformation projects.



- Expansion of Next-Generation Connectivity: Accelerating the rollout of 5G networks and exploring advancements in 6G

- digital services.
- Incentivizing Cloud Adoption: Offering tax benefits to enterprises transitioning to cloud-based Software as a Service (SaaS) models,

IT solution providers will see increased demand for networking, cloud services, and digital transformation solutions across sectors like banking, healthcare, and manufacturing.

# ₹ UNION BUDGET

## 4. Cultivating a Future-Ready Workforce

A notable highlight of the budget is the allocation of ₹5,000 crore towards skill development programs in AI and cloud computing:

- Massive Upskilling Endeavor: Aiming to

train over 1 million IT professionals in cutting-edge domains such as AI, machine learning, and cybersecurity.

- Expansion of Educational Institutions: Enhancing the capacity of premier institutes like IITs and IIITs, alongside establishing dedicated AI research

centers to nurture talent.

- Public-Private Partnerships: Encouraging collaborations between government bodies and private enterprises to design and implement industry-relevant training modules.

For IT service providers

and technopreneurs, this translates to access to a highly skilled talent pool, mitigating the prevalent skill gap in emerging technologies. The government is also offering scholarships and financial assistance for students enrolling in STEM and AI-related courses.



# Industry Perspectives on the Budget

## Positive Sentiments from IT Leaders

“ The AI and deep tech fund is a visionary move. We anticipate a surge in innovation and the development of AI-driven enterprise solutions. ”

**RAJAN NAVANI,**  
Chairman, CII India  
Digital Transformation Council



“ The emphasis on cybersecurity and AI infrastructure presents a substantial opportunity for IT channel partners to deliver next-generation data protection services. ”

**SANDEEP BHAMBURE,**  
MD, Veeam India



“ Reducing import duties on IT hardware will make technology products more affordable, boosting domestic demand and benefiting channel partners. ”

**KUNAL BAHL,**  
Co-founder, Snapdeal



## Encouragement for Startups and MSMEs

“ The government’s pro-startup policies are set to drive financial inclusion and stimulate economic expansion. ”

**HARSHIL MATHUR,**  
CEO, Razorpay



“ The new tax policies are poised to fuel consumption among the younger demographic, invigorating economic activity. ”

**KUNAL SHAH,**  
Founder, CRED



“ The Fund of Funds for Startups signifies a strategic shift towards creating tangible value in the startup ecosystem. ”

**RITESH AGARWAL,**  
CEO, OYO





## Challenges & Considerations for the IT Ecosystem

**While the budget is progressive, industry experts highlight some challenges:**

- Implementation bottlenecks – Ensuring timely execution of AI and digital transformation initiatives.
- Cybersecurity readiness – The rising threat landscape necessitates a stronger regulatory framework.
- MSME access to funds – Despite policies, ensuring ease of access to capital remains a concern.
- Data privacy concerns – Rapid AI adoption necessitates stronger governance frameworks and compliance measures.
- Adoption of new policies – Execution and awareness among MSMEs and startups require extensive support mechanisms.
- Bilateral Investment Treaty (BIT) Reforms – India’s evolving global economic position demands a refined BIT model to attract FDI in IT and tech industries.

In addition, the government’s decriminalization of over 100 statutory provisions and rationalization of customs tariffs aim to improve ease of doing business, providing significant relief for IT firms and startups.

The introduction of Bharat Trade Net is another major reform, streamlining international trade processes, improving India’s global competitiveness, and creating opportunities for IT logistics and automation firms.

Addressing these challenges will be critical in ensuring that IT channel partners and enterprises fully leverage the opportunities outlined in the budget.

Another concern among industry leaders is data privacy and regulatory compliance, as AI adoption scales rapidly. The government has promised a dedicated task force to establish AI governance guidelines and data security measures.





# UNION BUDGET

## Gartner Insights on Union Budget 2025

Industry analysts from Gartner believe that the Union Budget 2025 provides a significant push for India's IT sector, emphasizing digital transformation, AI adoption, and regulatory support. Some key insights from Gartner's research include:

- **Global IT Spending Trends:** Gartner projects a 9.8% increase in worldwide IT spending in 2025, reaching \$5.61 trillion. India's IT industry is expected to outpace this growth with an 11.1% surge, fueled by investments in AI, cloud infrastructure, and data centers.
- **Generative AI Investments:** Gartner analysts highlight that CIOs in India will start allocating budgets for Generative AI (GenAI)



initiatives in 2025, aligning with the government's ₹20,000 crore Fund of Funds. The IndiaAI Mission is expected to drive enterprise AI adoption, boosting productivity and digital transformation across industries.

- **Regulatory Landscape & Ease of Doing Business:** Gartner's Vice President Analyst D.D. Mishra emphasizes the importance of a structured regulatory

framework to facilitate growth:

"The government's regulatory approach should focus on balancing tactical growth with compliance, ensuring businesses can scale efficiently while maintaining security and governance standards."

- **Infrastructure & Cloud Growth:** Gartner foresees India's cloud computing market expanding by 14% in 2025, driven

by incentives for cloud adoption, SaaS investments, and green data centers. This aligns with India's Digital Bharat Vision, fostering tech-led economic growth.

- **Cybersecurity & Data Protection:** With AI-powered cybersecurity receiving budgetary focus, Gartner predicts an increased demand for cybersecurity talent, driving investments in zero-trust architectures and AI-driven threat detection systems.

Overall, Gartner analysts view Budget 2025 as a progressive roadmap, accelerating AI adoption, IT infrastructure modernization, and digital economy growth, making India an attractive investment hub for global tech firms.

## Conclusion: A Budget for Growth & Innovation

Budget 2025 sets the stage for India's technology-driven future, emphasizing AI, cloud computing, cybersecurity, and digital infrastructure. For IT solution providers and channel

partners, this budget translates to new business opportunities, enhanced skilling programs, and greater financial incentives.

With a forward-thinking approach, this budget has

the potential to make India a global leader in digital transformation, empowering businesses to embrace AI, cloud, and security-driven growth strategies.

As India moves towards

a digital-first economy, ITPV Channel Magazine will continue to track industry developments and provide insights on how IT businesses can thrive in this evolving landscape.

# FORTIFYING THE DIGITAL FRONTIER



**DHARSHAN SHANTHAMURTHY,**  
CEO, SISA

In an era where cyber threats are growing more sophisticated by the day, businesses across the world are striving to stay ahead of cybercriminals. Cybersecurity is no longer just about compliance; it's about ensuring business continuity, customer trust, and long-term resilience. To gain insights into this rapidly evolving domain, Kalpana Singhal sat down with Dharshan Shanthamurthy, Founder & CEO of SISA, a leading global cybersecurity firm specializing in forensic-driven security solutions.

In this insightful discussion, Dharshan delves into his journey, the transformation of cybersecurity, the role of AI, and the future of cyber defense.

■ **Dharshan, you are widely recognized as a thought leader in cybersecurity. What inspired you to venture into this domain, and what has been your defining moment as a leader?**

My journey into cybersecurity stemmed purely from passion. I started my career as a chartered accountant, but I was deeply intrigued by the impact of cyber threats on businesses and society.

One defining moment was in 2017 when Mr. Narayana Murthy inaugurated our cybersecurity campus. It was a realization that our company had grown into a serious player in the cybersecurity space, capable of making a substantial impact. That event marked our transition from a growing startup to a global cybersecurity company committed to protecting digital payments and enterprise security.

■ **You have built SISA into a leading global cybersecurity firm. What core values drive your leadership and the company's success?**

Integrity is the foundation of our business. In an industry where trust is paramount, unquestionable integrity is non-negotiable.

Another principle I follow is Kaizen, a Japanese philosophy of continuous improvement. Cybersecurity is dynamic, and one cannot afford to be stagnant. Every day, we strive to do better than yesterday—whether it's

refining our forensic-driven security approach, enhancing threat detection capabilities, or improving compliance frameworks.

■ **How do you see the cybersecurity landscape evolving, and what key trends should businesses be prepared for?**

Cybersecurity has evolved from being a compliance-

- in Cybersecurity – AI-driven threat detection is improving response times.
- 2. Zero Trust Architecture – Businesses are moving from perimeter security to identity-based access models.
- 3. Cloud Security & Data Sovereignty – The shift to cloud computing is increasing the focus on securing cloud workloads and complying with regional data protection

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driven function to a business-critical necessity. Earlier, companies viewed security as a cost of doing business, but now, cyber resilience is essential for survival.

**Key trends include:**

- 1. AI and Automation

- laws.
- 4. Forensics-Driven Security – Proactively learning from security breaches is now essential rather than just reacting to them.

■ **SISA is known for its 'Forensics-Driven**

**Security' approach. Can you explain how this sets you apart from traditional cybersecurity firms?**

At SISA, we take a forensics-driven approach to cybersecurity. We specialize in post-breach investigations and leverage insights from real-world cyberattacks to build proactive security measures.

A great analogy is the airline industry—it has one of the lowest failure rates because every accident is meticulously analyzed to prevent future incidents. Similarly, our cyber forensics practice helps organizations understand attack patterns and proactively strengthen their security.

■ **With AI playing a crucial role in cybersecurity, how do you see the balance between innovation and ethical risks?**

AI is a double-edged sword. On one hand, AI-driven threat detection can help mitigate risks faster than traditional methods. However, bad actors are also leveraging AI to automate cyberattacks and create deepfake phishing scams.

To counter this, businesses must invest in AI-powered cybersecurity while ensuring AI safety and ethical AI governance. The key is 'Cybersecurity for AI'—building guardrails that prevent AI from being manipulated for malicious purposes.

■ **Payment security**

*Cont'd on page - 18*



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**has become a growing concern. How is SISA working to safeguard the digital payments ecosystem?**

The digital payments industry is highly regulated, yet cybercriminals continuously evolve their tactics. Our core focus is protecting payment ecosystems globally, and we do this through:

- Forensic Investigations – We help businesses recover from breaches while strengthening their security.
- Threat Intelligence & Compliance – We work closely with regulatory bodies like PCI DSS, RBI, and global financial institutions to set robust compliance standards.
- Real-time Threat Monitoring – Our Security Operations Center (SOC) continuously monitors and mitigates cyber threats for financial institutions.

We believe the cost of non-compliance is far greater than the cost of compliance—one major breach can lead to massive financial losses and reputational damage.

**■ What are your thoughts on cyber insurance? Should organizations consider it as a key component of their security strategy?**

Absolutely! Cyber insurance is becoming as important as traditional insurance policies. Just as businesses protect themselves against physical damage,

they need coverage for data breaches, ransomware attacks, and regulatory fines.

However, companies must ensure they meet cybersecurity hygiene standards before opting for insurance. Many policies have exclusions that do not cover breaches resulting from poor security practices. At SISA, we work with cyber insurers and clients to ensure they meet necessary compliance standards before applying for coverage.

**“ Cyber insurance is becoming as important as traditional insurance policies. Just as businesses protect themselves against physical damage, they need coverage for data breaches, ransomware attacks, and regulatory fines. However, companies must ensure they meet cybersecurity hygiene standards before opting for insurance. Many policies have exclusions that do not cover breaches resulting from poor security practices. ”**

**■ With geopolitical cyber threats rising, do you see cyber warfare becoming a bigger global issue?**

Cyber warfare is no longer a futuristic concept—it’s happening now. Whether it’s state-sponsored cyberattacks, hacking of critical infrastructure, or

AI-driven misinformation campaigns, the stakes have never been higher.

The Ukraine-Russia conflict highlighted how cyberattacks can cripple a nation’s infrastructure. As threats escalate, public-private collaboration in cybersecurity will be key. Governments must strengthen national cybersecurity policies, and businesses must invest in advanced threat intelligence. India, being the world’s

largest democracy, has a crucial role in ensuring global cybersecurity stability.

**■ Looking ahead, what’s next for SISA? What is your vision for the future of cybersecurity?**

Cybersecurity is at a critical inflection point, and

at SISA, we are committed to shaping the future of security. Our roadmap includes:

- Expanding our global presence – We currently operate in 40+ countries, and we aim to grow our footprint in North America and Europe.
- AI & Automation – Investing in AI-driven threat intelligence to detect and respond to threats in real-time.
- Cyber Resilience for Digital Payments – Strengthening security for merchants, fintechs, and payment networks.
- IPO & Growth Plans – We are gearing up for an IPO, positioning SISA as a global leader in cybersecurity.

Our mission is to make cybersecurity as safe as the airline industry, ensuring businesses remain resilient, compliant, and one step ahead of cyber threats.

**Conclusion:** Cybersecurity is Everyone’s Business

As businesses continue their digital transformation, cybersecurity must be a strategic priority. With rising cyber threats, AI-driven security, and evolving compliance landscapes, companies must stay vigilant, adaptive, and proactive.

Dharshan’s vision for forensics-driven security offers a compelling approach to staying ahead in an increasingly volatile cyber environment. As India and the world brace for next-gen cyber threats, organizations must rethink their security strategies and invest in future-proof cybersecurity solutions.

# Netskope extends data security capabilities with enhanced Enterprise Browser



Netskope, a leader in modern security and networking, today announced enhancements to its Netskope One Enterprise Browser, further extending the company's leadership in unified data security to add more key use cases requested by customers. By delivering Enterprise Browser fully integrated with the Netskope One platform's Security Service Edge (SSE) capabilities, Netskope enables organisations to increase productivity and streamline the security of how unmanaged devices and temporary workers connect to web sites, applications, and other resources.

Bring-your-own device (BYOD) policies and the temporary work requirements of contractors are two of many use cases that can create security risks for businesses based on access to data. Enterprise browser functionality that is well integrated with a full SSE offering means that organisations can count on

data security not only when users interact with cloud and SaaS apps, but also to prevent data leakage both to apps and unmanaged endpoint devices, ensuring SSE adaptive policy controls are consistently applied.

"Enterprise browser functionality should be delivered as part of a unified data security solution," said John Martin, Chief Product



**JOHN MARTIN,**  
Chief Product Officer,  
Netskope

Officer, Netskope. "At Netskope, our strategy has always been to enable modern data security using the broadest and deepest protection from a single, holistic platform. As we shared our continued expansion plans with security and networking leaders over the past year, it quickly became clear that enterprise browser capabilities are best when integrated at the architecture level, making use of full SSE data security and adaptive policy controls, not just as a product add-on."

Netskope helps organisations modernise their businesses by converging critical security, network, and analytics services into a powerful, cost-efficient platform, Netskope One. By integrating Enterprise Browser with the full SSE capabilities of the Netskope One platform, organisations accelerate time-to-value and operational efficiency, especially with the ability to extend current SSE application control policies to unmanaged device users and temporary users such as contractors working as part of a merger & acquisition process.

## Netskope One Enterprise Browser today:

- Enables seamless secure access for unmanaged devices and temporary workers to web sites

and applications using a hardened, managed Chromium-based browser built by Netskope engineers

- Integrates with enterprise identity providers for user authentication and context
- Applies zero trust principles for adaptive access that leverages rich context from overall SSE policy controls
- Prevents data leakage to apps and to unmanaged endpoints
- Leverages high performance global access, thanks to the Netskope One platform's underlying NewEdge network, which offers full compute at every global data centre covering 75+ regions, 220+ countries and territories, and 200+ Localization Zones

Netskope One Enterprise Browser is available today and offered flexibly or as part of SSE subscription packages.

Netskope has been consistently recognised over the past decade for its leadership in unified data protection, including in the Gartner Magic Quadrant™ for Security Service Edge, where it is ranked as highest in execution and furthest in vision, and its companion Critical Capabilities for Security Service Edge report, where Netskope is among top-ranked vendors in data protection capabilities.

# Measuring AI & Data Analytics Impact – A Key Challenge for CDAOs, Finds Gartner Survey



A recent survey by Gartner has revealed that 30% of Chief Data & Analytics Officers (CDAOs) cite the inability to measure data, analytics, and AI impact on business outcomes as their top challenge. Despite increasing investments in data-driven decision-making, a significant gap remains in effectively quantifying its business value.

The annual Gartner Chief Data & Analytics Officer Agenda Survey—conducted between September and November 2024 among 504 global data and analytics executives—highlights that while organizations aspire to be data-driven, few have clear frameworks to demonstrate its impact.

## The Value Gap in Data & Analytics Initiatives

“There is a massive value vibe around data, where many organizations talk

about the value of data and aspire to be data-driven, yet few can substantiate it,” said Michael Gabbard, Senior Director Analyst at Gartner. “Organizations that regularly align to data-driven strategies tend to outperform their peers, but defining and tracking real business impact remains a challenge.”

The survey found that for over 90% of CDAOs, delivering value- and outcome-focused data and analytics (D&A) strategies has been their primary responsibility over the last 12 to 18 months. However, only 22% of surveyed organizations have successfully defined, tracked, and communicated business impact metrics for most of their D&A use cases.

## Bridging the Gap Between Data Strategy & Execution

As organizations

continue to prioritize data-driven decision-making and operational efficiency, CDAOs are under increasing pressure to develop and execute robust data and analytics strategies. However, a crucial disconnect remains between strategy formulation and execution.

According to Gartner’s findings, while 91% of CDAOs recognize the creation of an actionable D&A strategy as a key responsibility, over one-third do not see evolving and implementing an operational model as a priority.

This gap highlights a fundamental issue—without a structured operational framework, even the most well-defined data strategies struggle to translate into tangible business impact.

## Future Roadmap: The Role of CDAOs in Driving Business

### Growth

To address these challenges, CDAOs must accelerate their data-driven vision by:

- Aligning data strategies with core business objectives to drive real, measurable impact.
- Developing clear, outcome-based metrics to track AI and data analytics success.
- Bridging the execution gap by integrating business impact tracking into everyday decision-making.

“CDAOs must accelerate data-driven and decision-centric visions by spotting important trends early and making proactive, informed choices about their D&A strategy,” Gabbard added.

As businesses increasingly rely on AI and data analytics for competitive advantage, CDAOs will play a pivotal role in ensuring that data translates into business success.

## Final Takeaway: Moving from Data Talk to Data Impact

The Gartner survey underscores the need for businesses to move beyond simply aspiring to be data-driven and instead focus on measuring and demonstrating tangible outcomes. Organizations that successfully link data strategies with real business impact will continue to lead the digital transformation race in the coming years.

# Shepherd partners with Intel to enhance its endpoint protection suite with hardware-based ransomware detection



endpoint security software will provide superior protection against ransomware threats when used on Intel-based devices.”

“Shepherd has always prioritized minimizing the impact on system performance while delivering performant management and security, which is a significant draw for our customers. Utilizing technology that enhances prevention and protection while maintaining system performance is a win-win,” added Anter.

“We are partnering with Shepherd to bolster cybersecurity for enterprise customers. Shepherd, enhanced with Intel Threat Detection Technology, will

strengthen ransomware defenses when deployed on Intel Core Ultra AI PCs,” said Carla Rodriguez, VP and GM Intel Client Software Enabling.

The advantages of this integration will be available later this year with the forthcoming release of Shepherd’s updated endpoint security and management products.

This innovation aligns with India’s broader push towards technology-driven growth as highlighted in the Union Budget 2025. The budget introduced a new Fund of Funds for Startups with an additional ₹10,000 Cr and explored a Deep Tech Fund of Funds to catalyze next-generation startups, initiatives crucial for companies like Shepherd.

Additionally, the allocation of ₹20,000 Cr for private sector-driven R&D and innovation reflects a positive move towards fostering technological advancements.

The introduction of an AI Centre of Excellence (CoE) for education further emphasizes the government’s commitment to integrating AI into the educational framework, promoting innovation from an early stage. However, industry leaders stress the importance of streamlined implementation and clearer execution strategies to fully realize these initiatives’ potential.

Shepherd, a leading IoT and enterprise endpoint security and management vendor headquartered in India, has set out to integrate Intel® Threat Detection Technology (Intel® TDT) into its device security and management suite to bolster defenses against ransomware.

Given the severe consequences of previous ransomware attacks and the complexities of maintaining robust endpoint defenses, ransomware detection remains a top priority within the cybersecurity industry. By upgrading Shepherd’s endpoint security solutions with new ransomware detection capabilities, customers will benefit from enhanced defenses against detection evasion tactics.

Anter Virk, CEO of Shepherd, states, “This integration aims to utilize CPU-level telemetry for real-time detection of

unauthorized encryption attempts. It aligns with Shepherd’s commitment to a proactive and real-time security approach. By combining our kernel-mode detection technology with Intel® TDT, Shepherd’s



**ANTER VIRK,**  
CEO, Shepherd

# Fortinet Evolves FortiAnalyzer into a Turnkey AI-Driven SecOps Platform for Resource-Constrained Security Teams



Fortinet®, the global cybersecurity leader driving the convergence of networking and security, today announced significant enhancements to FortiAnalyzer, reinforcing its role in driving faster, smarter security operations (SecOps) all from a single, turnkey hybrid platform tailored for midsize enterprises and teams impacted by the cyber skills shortage.

FortiAnalyzer is a powerful, streamlined entry point to scale an organization's security operations center (SOC), providing broad coverage for both on-premises and cloud environments from a single platform. With ready-to-deploy capabilities that deliver complete control with centralized visibility, advanced threat detection, and automated incident response, FortiAnalyzer helps organizations increase their agility and ability to rapidly expand SecOps coverage and use cases without adding complexity.

"Security teams today are stretched thin, yet they're expected to defend against increasingly complex and targeted threats," said Nirav Shah, Senior Vice President, Products and Solutions at Fortinet. "With the latest advancements in FortiAnalyzer, we've eliminated the need for additional SecOps tools, making it the ideal turnkey AI-driven security operations platform supporting on-premises and cloud environments. This is a game-changer for lean security teams, allowing them to enhance threat detection, automate incident response, and streamline critical security operations functions from a single platform."

## AI-Driven Security Operations, Simplified

As cyberthreats grow more sophisticated and the attack surface expands, organizations—particularly those with resource-constrained security and IT

teams—struggle to manage security operations effectively. Recognizing this challenge, Fortinet continues to evolve FortiAnalyzer with cutting-edge AI and automation, ensuring that organizations can detect, investigate, and respond to threats faster and more efficiently without needing a complex, multi-tool security stack.

## The newly enhanced FortiAnalyzer delivers:

Unified data lake for centralized visibility: Consolidated network and security logs, security analytics, and compliance reporting from across the Fortinet Security Fabric into a single platform view, with enhanced IoT, SOC, email security, and endpoint dashboards offer deeper insights into high-severity incidents, compromised hosts, and vulnerabilities, reducing complexity for security teams.

Advanced threat detection and AI-powered

analysis from FortiGuard Labs: Enriched views with integrated threat intelligence, including the FortiGuard Indicator of Compromise (IoC) and Outbreak Detection subscription help analysts identify and address vulnerabilities faster. FortiAnalyzer built-in AI capabilities automatically identify high-priority alerts and downloads relevant event handlers, correlation rules, and reports to help organizations understand an attack's background, timeline, affected technologies, and related threat intelligence. These capabilities have been further enhanced through zero-trust network access (ZTNA)-based detections and Safeguarding, which detect harmful content to identify and mitigate emerging threats effectively.

Automated incident response: New prebuilt SOC automation content packs equip teams with the latest event handlers, playbooks, and third-party log parsers, such as Armit Platform, Microsoft Office 365, and more, enabling security teams to contain and remediate threats with minimal manual intervention.

Expanded automation connectors: Enhanced native integrations with FortiAuthenticator, FortiSandbox, FortiWeb, FortiMail, and VirusTotal provide more automation actions, reducing response times and improving incident resolution.

Native integration with the Fortinet Security Fabric: Unified interoperability across

Fortinet’s cybersecurity solutions ensures end-to-end protection with AI-driven correlation and actionable insights.

Third-party device and dynamic SOC service support: Integrations with third-party devices and dynamic SOC services ensure organizations can seamlessly deploy FortiAnalyzer within their existing infrastructure and secure their entire ecosystem with a unified platform.

Embedded GenAI assistance: FortiAI, the Gen-AI assistant built into the FortiAnalyzer user experience, maximizes the product capabilities, analytics, and telemetry to help security teams supercharge threat investigation and response at the speed of AI.

## A Smarter Approach to Security Operations

With these latest innovations, FortiAnalyzer empowers lean security teams to manage hybrid environments at the level of large, well-resourced security operations teams without requiring extensive personnel or multiple security tools. By leveraging AI-driven automation, FortiAnalyzer enables organizations to maximize efficiency at scale without complexity, delivering faster detections, smarter responses, and decreased risk within a unified platform.

Current FortiAnalyzer customers with FortiGuard subscription services already have access to the new features and capabilities. Content packs are updated regularly, ensuring that organizations keep pace with emerging threats and enabling the expansion of SOC coverage as needs evolve.

## Additional Resources

- Learn more about FortiAnalyzer.
- Learn about FortiGuard Labs Advisory Services for cyber resilience.
- Read more about the Fortinet Security Fabric.
- Visit [fortinet.com/trust](https://fortinet.com/trust) to learn about Fortinet innovation, collaboration partners, product security processes, and enterprise-grade products.
- Read about how Fortinet customers are securing their organizations.
- Learn about Fortinet’s commitment to product security and integrity, including its responsible product development and vulnerability disclosure approach and policies.
- Follow Fortinet on X, LinkedIn, Facebook, and Instagram. Subscribe to Fortinet on our blog or YouTube.

# CrowdStrike Falcon® Cloud Security Supported on Oracle Cloud Infrastructure

CrowdStrike today announced it is bringing the power of CrowdStrike Falcon® Cloud Security to Oracle Cloud Infrastructure (OCI).

Cloud intrusions increased 75% last year, highlighting the challenges security teams face with an expanding cloud attack surface and the increasing complexity of managing numerous disjointed tools. Stopping cloud breaches requires a modern platform that unifies visibility and protection across every attack path in today’s hybrid and multi-cloud environments. Falcon Cloud Security combines advanced cloud detection and response (CDR) capabilities with the most comprehensive CNAPP on the market. It provides customers with a single, unified platform that helps secure applications, data, identities, AI models and SaaS environments across all major cloud providers, delivering complete multi-cloud protection.

“Organizations need a unified platform for cloud security – not a patchwork of solutions that fail to stop threats,” said Daniel Bernard, chief business officer, CrowdStrike. “Today’s cloud security landscape is fragmented, forcing businesses to manage too many point products that increase costs, complexity and risk. CrowdStrike and Oracle are changing that. With Falcon Cloud Security supported on OCI, organizations get one platform for complete cloud protection.”

“Security should never be an afterthought especially in this rapidly evolving AI landscape,” said Mahesh Thiagarajan, executive vice president, Oracle Cloud Infrastructure. “With Falcon Cloud Security supported on OCI, customers gain access to a unified platform to help secure cloud

workloads.”

For more information on the CrowdStrike-Oracle Cloud Infrastructure partnership, visit our website.

About CrowdStrike CrowdStrike (NASDAQ: CRWD), a global cybersecurity leader, has redefined modern security with the world’s most advanced cloud-native platform for protecting critical areas



**DANIEL BERNARD,**  
chief business officer,  
CrowdStrike

of enterprise risk – endpoints and cloud workloads, identity and data.

Powered by the CrowdStrike Security Cloud and world-class AI, the CrowdStrike Falcon® platform leverages real-time indicators of attack, threat intelligence, evolving adversary tradecraft and enriched telemetry from across the enterprise to deliver hyper-accurate detections, automated protection and remediation, elite threat hunting and prioritized observability of vulnerabilities.

Purpose-built in the cloud with a single lightweight-agent architecture, the Falcon platform delivers rapid and scalable deployment, superior protection and performance, reduced complexity and immediate time-to-value.

# AI-capable PC shipment share rises to 23% in Q4 2024

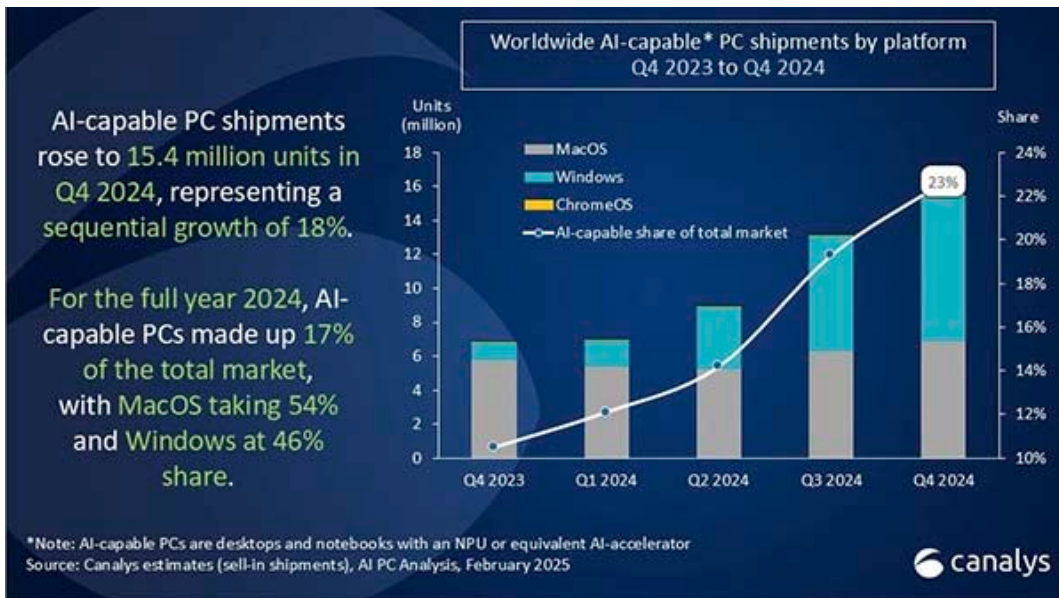
The latest Canalys, now part of Omdia, data reveals that AI-capable PC shipments hit 15.4 million units in Q4 2024, accounting for 23% of all PC shipments during the quarter. AI-capable PCs are defined as desktops and notebooks that include a

being Apple at 54% share, followed by Lenovo and HP at 12% share each. The refresh cycle induced by the Windows 10 end of support will continue to drive penetration throughout 2025. However, Trump’s tariffs on US imports are causing uncertainty

their momentum in late 2024 as vendors introduced business-focused programs and products,” said Kieren Jessop, Analyst at Canalys. “Intel is anchoring in the premium tier, with Lunar Lake-powered devices meeting Copilot+ PC requirements

similarly bifurcating its portfolio as it shared plans to bring the X-series processors to US\$600-range laptops. Legacy generations of Apple’s Macs have also seen price reductions, which is helping drive its commercial share, particularly in emerging markets,” added Jessop.

“As the deadline for Windows 10 end of support gets closer, it is emerging as the primary refresh catalyst among partners,” said Jessop. According to a January poll of channel partners, one-third cited Windows 10 EoS as the primary driver of their customers’ refresh decisions in 2025. “Many of these partners are expecting the majority of their customers’ refresh to occur in the second half of 2025,” added Jessop. “However, looming trade policy shifts in the US threaten to disrupt the market that accounts for around one in three shipped PCs and could hamper the upcoming commercial refresh cycle and dampen an already muted consumer outlook. So far, the Trump administration



chipset or block for dedicated AI workloads such as an NPU. The ramp-up in the availability of such devices led to a sequential growth of 18% for this category of PCs. For the full year 2024, 17% of PCs shipped were AI-capable, with the biggest winners

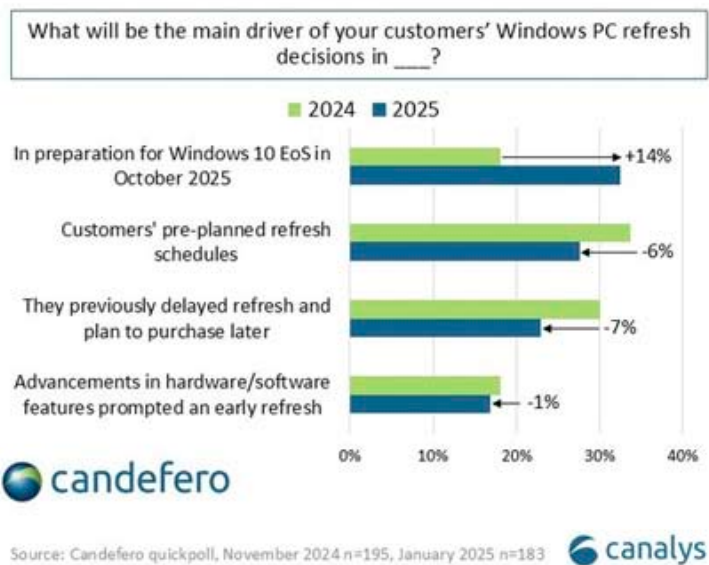
around price hikes, which could significantly impact the world’s largest PC market. “Commercial deployments of AI-capable PCs continued

but carrying higher costs than their main x86 competitor AMD, which is straddling premium and mid-range segments. Qualcomm is



**KIEREN JESSOP,**  
Analyst, Canalys

According to 33% of channel partners, the end of support for Windows 10 is the main driver of PC refresh in 2025.



has placed a 10% tariff on all Chinese imports, which accounts for a significant majority of laptops shipped to the US.”

**Vendor and platform highlights**

Total Windows AI-capable PC shipments grew 26% sequentially, accounting for 15% of all Windows PCs shipped in Q4. “At CES 2025, PC manufacturers expanded their focus on AI-driven software, integrating proprietary assistants and applications across more product lines,” said Jessop. “Offerings like Lenovo AI Now, Dell Pro AI Studio, HP AI Companion and Asus StoryCube—while not entirely new—were more prominently featured, signaling a shift toward differentiation through software

comprising ‘Dell’, ‘Dell Pro’ and ‘Dell Pro Max’. Dell’s rebranding strategy reflects a broader industry trend toward simplification and user-centric design. However, the transition period may require substantial marketing efforts to familiarize existing customers with the new naming conventions.”

“Apple finished strong in Q4 2024, significantly outgrowing the top three vendors and achieving a 10.2% market share in the total PC market and 45% share in the AI-capable PC market,” added Jessop. “Apple’s channel strategy continues to evolve as they announced the Apple Partner Network, launching later this year. This revamped program simplifies partner tiers and aims to take a share in the Enterprise segment while providing

**Intel Unveils High-Performance, Power-Efficient Ethernet Solutions to Optimize Network Infrastructure**



Intel has introduced two new Ethernet product lines—the Intel® Ethernet E830 Controllers and Network Adapters and the Intel® Ethernet E610 Controllers and Network Adapters—to address the increasing demands of enterprise, telecommunications, cloud, edge, high-performance computing (HPC), and artificial intelligence (AI) applications. These solutions aim to provide robust, high-performance connectivity while enhancing energy efficiency and security, ultimately reducing the total cost of ownership (TCO).

The Intel Ethernet E830 series is designed to deliver high-performance network connectivity with improved performance per watt, catering to demanding workloads. Meanwhile, the Intel Ethernet E610 series incorporates the latest advancements in 10GBASE-T technology, optimizing network management and performance.

By integrating these Ethernet solutions with Intel’s cutting-edge Xeon® processors, businesses can build scalable, data-intensive applications that accelerate innovation, reduce costs, and gain a competitive edge. These products are particularly beneficial for data center and edge environments, offering significant improvements in performance per watt and robust security features.

Bob Ghaffari, Intel’s Vice President of the Network and Edge Group, stated, “In today’s interconnected world, networking is essential to the success of business and technology transformation. With the launch of the Intel Ethernet E830 and E610 products, we are helping customers meet the growing demand for high-performance, energy-efficient solutions that optimize network infrastructures, lower operational costs, and enhance TCO.”

These new Ethernet products are now available and are expected to play a crucial role in modernizing network infrastructures across various industries.



and user experience enhancements. Furthermore, Apple Intelligence features were released across Mac, iPad and iPhone platforms. Although AI capabilities are not a primary purchasing driver, improved AI processor performance will make personalized experiences and productivity gains increasingly important and expected. Over time, this could influence brand loyalty, shaping customers’ decisions for future device upgrades.”

“Also, at CES, Dell unveiled a major overhaul of its product naming strategy, transitioning from established brands like XPS and Inspiron to a streamlined structure

the necessary services to handle customers. The program highlights Mac’s compatibility and scalability within the Enterprise environment, concerns which have previously kept them out of the segment.”

**Canalys AI capable PC definition:**

At a minimum, an AI-capable PC must be a desktop or notebook possessing a dedicated chipset or block to run on-device AI workloads. Examples of these dedicated chipsets include AMD’s XDNA, Apple’s Neural Engine, Intel’s AI Boost and Qualcomm’s Hexagon.

# The Tech Industry in India likely to reach milestone \$300Bn Revenue in FY2026: Nasscom Annual Strategic Review 2025



**A**mid shifting global economic patterns and evolving market dynamics, FY2025 has been a year of strategic resilience, with segments such as Engineering R&D and GCC driving growth



**SINDHU GANGADHARAN,**  
Chairperson, Nasscom

for the technology industry in India. Nasscom today released the key findings of its Annual Strategic Review 2025, highlighting the defining trends of FY2025E (estimated) and the tech industry outlook for FY2026.

Growing at 5.1% the tech industry in India added \$13.8 billion incremental revenue, taking the total industry revenue to over \$282.6 Billion (including Hardware), in FY2025E. Sub-sectors like Engineering R&D, with GCCs spanning across Services and BPM, have emerged as key growth hotspots. Digital Engineering is expanding into sectors like BFSI, Healthcare, and Retail, with nearly two-thirds of large deals centered on this shift. In 2024, the industry houses over

1750+ GCCs reflecting a growing emphasis on high-value services and product engineering. The industry exports revenue now indicates an equal revenue split between Global MNCs (including GCCs) and Indian



**RAJESH NAMBIAR,**  
President, Nasscom

service providers.

Technology's role in economic value creation continues to expand, with tech-driven investments accounting for a growing share of revenues as businesses across sectors integrate digital capabilities. India's digital economy driven by sustained growth in domestic tech spending outpaced export growth for the second consecutive year, with domestic tech revenues registering a 7% annual increase from FY2024. The momentum has been further driven by increased adoption of enterprise software and cloud solutions, alongside a 21% growth in data centre capacity driving increased investments.

The broader digital economy now contributes an estimated 12% to GDP, with Digital Public Infrastructure adding a 1% value boost. E-commerce continues to expand rapidly, growing at a 35% annual rate, with projected GMV nearing \$200 billion.

As India steadily advances in AI maturity, enterprises are expanding their AI initiatives at scale. While overall AI adoption remains measured, over 55% of AI activity by Indian tech services firms focused on building long-term co-creation partnerships to develop scalable, future-ready AI solutions. Notably, more than 90%+ of the top 20 services companies are integrating AI, Cloud, Data, and GenAI across business functions, with 10-15% of enterprise GenAI PoCs

transitioning to full-scale production.

Despite the irreversible shifts led by AI and global headwinds, the tech industry continues to be the net hirer. The industry is expected to add 126,000 net new employees taking the total workforce to 5.8 million in FY2025E.

Sindhu Gangadharan, Chairperson, Nasscom, said, "Enhanced AI implementation, rise of Agentic AI disrupting business models, and increasing maturity of GCCs as hubs for value and transformation are driving the industry shifts. As technology becomes deeply intertwined with global geopolitics and trade dynamics, enterprises must prioritize tech skills transformation within the workforce. Building resilient organizations and investing in digital trust will be critical to shaping these trends and sustaining the tech industry's long-term growth."

Rajesh Nambiar, President, Nasscom, said, "India's tech skill intensity will be a critical driver of future growth. While CEO outlook for FY2026 remains measured yet positive, with increased tech and AI spending, sustaining the growth momentum requires a strategic vision. However, upskilling in niche and core tech areas will continue to remain of paramount importance for the industry."

### **Insights from Nasscom Tech Industry CEO Survey 2025**

As we enter 2025, CEO sentiment is on an upward trajectory despite global headwinds, reflecting cautious optimism. Approximately 77% of tech CEOs surveyed anticipate higher business growth, while 85% of the surveyed respondents expect client tech spending to be similar or higher in FY2026 compared to FY2025. Notably, 63% of tech CEOs project AI investments to be higher than 10% of their overall tech spending in FY2026.

With AI becoming increasingly integrated into the workforce, 45% of tech CEOs foresee a healthier hiring environment compared to FY2025. However, skills will be key to new job creation. These trends point to a cautiously optimistic industry outlook, with the tech sector projected to achieve the milestone of \$300 billion in revenue by FY2026.

## **OpenText Expands Cybersecurity Portfolio with AI-Powered OpenText Core Threat Detection and Response**



**O**penText has announced the launch of OpenText Core Threat Detection and Response, an AI-powered cybersecurity platform designed to provide enhanced security intelligence and automated threat mitigation. Built to integrate seamlessly with Microsoft Security solutions, this offering reinforces OpenText's commitment to strengthening enterprise cybersecurity strategies.

In today's threat landscape, businesses are grappling with rising insider threats and cyber risks, often costing millions due to data breaches. According to the 2023 Cost of Insider Risks Global Report, insider-related incidents now cost organizations an average of \$16.2 million annually. With cybersecurity talent shortages exacerbating the issue, OpenText's latest innovation delivers proactive threat response capabilities to bridge the gap.

**Why OpenText Core Threat Detection and Response Stands Out:**

**Integrated Security Posture:** The solution leverages AI-driven analytics to process billions of security events, boosting detection capabilities for enterprises.

**Multi-Cloud Integration:** Fully compatible with Microsoft

Defender for Endpoint, Microsoft Entra ID, and Microsoft Security Copilot, ensuring rapid response and remediation.

**Automated Threat Hunting:** Uses machine learning models to detect insider threats, ransomware attacks, and advanced persistent threats (APTs) in real-time.

**Simplified Security Management:** Features a user-friendly Cybersecurity Aviator tool, which translates AI-generated threat insights into plain language for faster response by SOC analysts.

"Enterprises need smarter, AI-driven solutions that enhance security without adding complexity," said Muhi Majzoub, OpenText EVP, Security Products. "OpenText Cybersecurity Cloud provides enterprises with a comprehensive cybersecurity strategy, leveraging AI to neutralize threats efficiently."

With its ability to integrate third-party security solutions via OpenText's Threat Integration Studio, this cybersecurity cloud platform helps organizations streamline security operations, prevent costly cyber incidents, and strengthen resilience against future threats. OpenText remains a leader in cybersecurity innovation, delivering scalable solutions for enterprises of all sizes

# TechnoBind and Kaspersky Forge Strategic Alliance to Strengthen India's Cybersecurity Landscape



**T**echnoBind, a specialist distributor focused on data and associated domains, is proud to announce its strategic partnership with Kaspersky, a global cybersecurity and digital privacy company. As part of this collaboration, TechnoBind will serve as Kaspersky's value-added distributor in India, bringing



**ERNEST CHAI,**  
Head of Channel for Asia Pacific at Kaspersky

its cutting-edge security solutions to a wider market and reinforcing its commitment to strengthening cybersecurity across enterprises and businesses in the region.

With cyber threats becoming more sophisticated and pervasive, the need for robust cybersecurity solutions has never been more critical. Through this alliance, TechnoBind will leverage its deep channel expertise and robust partner network to drive the adoption of Kaspersky's industry-leading endpoint security, threat intelligence, and cyber defense solutions across various industry verticals.

"We are thrilled to partner with Kaspersky and expand our cybersecurity portfolio with their

globally trusted security solutions," said Prashanth GJ, CEO at TechnoBind. "This partnership aligns with our mission to bring sophisticated cybersecurity technologies to enterprises, ensuring they are well-equipped to combat modern cyber threats. With our strong partner ecosystem, we aim to accelerate the adoption of Kaspersky's



**PRASHANTH GJ,**  
CEO at TechnoBind

solutions across businesses in India."

As a global leader in cybersecurity, Kaspersky offers a comprehensive suite of security solutions, including advanced threat protection, endpoint security, cloud security, and threat intelligence services. With its AI-driven approach and extensive research in cyber threat analysis, Kaspersky has been at the forefront of securing businesses from evolving digital threats.

Commenting on the partnership, Ernest Chai, Head of Channel for Asia Pacific at Kaspersky said, "India is a key market for Kaspersky, and our collaboration with TechnoBind is another significant step towards expanding our reach in the local cybersecurity market. TechnoBind's expertise in value-added distribution and its strong foothold in the Indian IT landscape make them an ideal partner to deliver our solutions to more enterprises and SMBs alike."

TechnoBind understands the growing technology needs of its customers in the Indian and APAC regions. Constant monitoring and being in touch with OEMs, partners and resellers have helped the company understand where there is a gap in the market and formulate a plan of action to bridge that gap.

# Gartner Says Worldwide Semiconductor Revenue Grew 18% in 2024

**S**TAMFORD, Conn., Worldwide semiconductor revenue in 2024 totaled \$626 billion, an increase of 18.1% from 2023, according to preliminary results by Gartner, Inc. Revenue is projected to total \$705 billion in 2025.

“Graphics processing units (GPUs) and AI processors used in data center applications (servers and accelerator cards) were the key drivers for the chip sector in 2024,” said George Brocklehurst, VP Analyst at Gartner. “The rising demand for AI and generative AI (GenAI) workloads led data centers to become the second-largest market for semiconductors in 2024, behind smartphones. Data center semiconductor



**GEORGE BROCKLEHURST,**  
VP Analyst, Gartner

revenue totaled \$112 billion in 2024, up from \$64.8 billion in 2023.”

The positive performance of the overall market impacted the ranking of several semiconductor vendors. Eleven vendors

experienced double-digit growth and only 8 of the top 25 semiconductor vendors posted revenue decline in 2024.

## Samsung Electronics Regained No. 1 Spot in 2024

With 9 out of the top 10 semiconductor vendors recording revenue growth in 2024, the ranking of the top 10 semiconductor vendors changed year-over-year (see Table 1).

Samsung Electronics reclaimed the No.1 spot from Intel and extended its lead over the company in 2024 driven by a strong rebound in memory device prices. Samsung Electronics revenue totaled \$66.5 billion in 2024.

Intel moved to the No. 2 position as its product set — AI PCs and the Core Ultra chipset — was insufficient to offset the limited success of its AI accelerator offering and the modest growth in its x86 business. Intel’s semiconductor revenue was flat at 0.1% growth in 2024.

Nvidia continued to perform exceptionally well, increasing its semiconductor revenue by 84% in 2024, to total \$46 billion. It moved up two spots to secure the No. 3 position thanks to the strength of its AI business.

HBM to Represent 19.2% of DRAM Revenue in 2025, Up from 13.6% in 2024

Memory revenue recorded 71.8% revenue growth in 2024. Memory’s share as a percentage of total semiconductor sales increased to 25.2% in 2024. DRAM revenue improved 75.4% in 2024 while NAND revenue increased 75.7% year-over-year. High-bandwidth memory (HBM) production contributed significantly to the revenue for DRAM vendors. HBM revenue represented 13.6% of total DRAM revenue in 2024.

Nonmemory revenue increased 6.9% in 2024. Nonmemory accounted for 74.8% of total semiconductor revenue in 2024.

“Memory and AI semiconductors will drive near-term growth, with HBM projected to account for an increasing share of DRAM revenue, reaching 19.2% in 2025,” said Brocklehurst. “HBM revenue is estimated to increase 66.3% in 2025, reaching \$19.8 billion.”

**Table 1. Top 10 Semiconductor Vendors by Revenue, Worldwide, 2024 (Millions of U.S. Dollars)**

2024 Rank	2023 Rank	Vendor	2024 Revenue	2024 Market Share (%)	2023 Revenue	2024-2023 Growth (%)
1	2	Samsung Electronics	66,524	10.6	40,942	62.5
2	1	Intel	49,189	7.9	49,117	0.1
3	5	NVIDIA	45,988	7.3	25,053	83.6
4	6	SK hynix	42,824	6.8	23,027	86.0
5	3	Qualcomm	32,358	5.2	29,225	10.7
6	12	Micron Technology	27,843	4.4	16,123	72.7
7	4	Broadcom	27,641	4.4	25,613	7.9
8	7	AMD	23,948	3.8	22,307	7.4
9	8	Apple	18,880	3.0	18,052	4.6
10	9	Infineon Technologies	16,001	2.6	17,022	-6.0
		Others (outside top 10)	274,775	43.9	263,483	4.3
		<b>Total Market</b>	<b>625,971</b>	<b>100.0</b>	<b>529,964</b>	<b>18.1</b>



## Union Budget 2025: Fueling India's Tech Revolution

The Union Budget 2025 has set a bold and ambitious roadmap for India's digital economy, reaffirming the government's commitment to AI, cloud computing, cybersecurity, and IT infrastructure development. With a clear focus on self-reliance, economic resilience, and global competitiveness, this budget introduces strategic policies that are poised to accelerate India's transformation into a global technology hub.

One of the most significant highlights is the ₹20,000 crore Fund of Funds for AI and deep tech startups, a move that strengthens India's position in cutting-edge innovations. AI is no longer just an emerging technology; it is the backbone of the digital revolution—reshaping industries, optimizing business operations, and enhancing cybersecurity. This initiative, along with the IndiaAI Mission, will unlock immense opportunities for IT service providers, channel partners, and solution integrators, ensuring that AI-driven solutions become more accessible and widely adopted across sectors.

The IT and channel ecosystem will also benefit from ₹11.2 trillion allocated for infrastructure investments, covering 5G expansion, rural broadband deployment, and cloud adoption incentives. As India gears up for next-generation connectivity, these developments will enable businesses to scale operations, enhance data security, and drive cloud-first transformations. Furthermore, tax breaks and investment credits for MSMEs and startups provide crucial financial support, fostering a thriving innovation landscape.

Industry experts have welcomed this budget, with Gartner forecasting an 11.1% growth in India's IT spending for 2025, surpassing global trends. The focus on Generative AI, cybersecurity frameworks, and enterprise digitization aligns with the evolving needs of the IT sector. NASSCOM, too, has lauded initiatives like the Deep Tech Fund, the ₹10,000 crore Fund of Funds for startups, and tax simplifications, which improve the ease of doing business and encourage sustained investments in technology-driven enterprises.

Additionally, the National Framework for Global Capability Centres (GCCs) is a game-changer. By enabling tier-2 cities to become IT hubs, the government is expanding the talent pool and infrastructure necessary for global corporations to set up operations in India. This move will create employment opportunities while ensuring that businesses can leverage cost-effective and high-quality talent for their IT needs.

However, as with any ambitious policy framework, challenges remain. Implementation bottlenecks, cybersecurity readiness, and access to capital for MSMEs are critical areas that need continued focus. Moreover, the growing concerns around data privacy and AI governance require robust regulatory frameworks to ensure responsible AI adoption.

In this February edition of ITPV Channel Magazine, we explore how Union Budget 2025 shapes the future of India's IT ecosystem. With exclusive insights from industry leaders, in-depth analysis from Gartner and NASSCOM, and expert perspectives on AI, cloud, and cybersecurity, this issue serves as your go-to guide for decoding the budget's impact on the tech sector.

India is on the cusp of a digital revolution—are you ready to embrace the change?

KALPANA SINGHAL, Editor  
(E-mail: [kalpana@techplusmedia.co.in](mailto:kalpana@techplusmedia.co.in))

**EDITOR:** KALPANA SINGHAL  
**CONTENT HEAD:** Amit Singh  
**CONSULTING EDITOR:** Rajneesh De  
**NEWS ANALYST:** Ishita Gupta  
**CORRESPONDENT:** Bhawna Thapliyal  
**NEWS REPORTER:** Anindita Majumder, Urmi Saha

**INTEGRATED MARKETING COMMUNICATION:**  
 Arunim Agrawal, Mamta Kapoor

**ASSOCIATE ANALYST**  
 Shaithra S

**SALES:**  
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**PRODUCTION HEAD:**  
 Aji Kumar

**WEBSITE:**  
 Gaurav Rana

**PROMOTION:**  
 Amit Pandey, Nikita Gurung

**CIRCULATION:**  
 Pratap Ram

**FINANCE:**  
 Inder Pal

**HEAD OFFICE:**  
 370A, Sant Nagar, East of Kailash, New Delhi  
 Tel: 41625763, 26237405, 41620042  
 Email - [kalpana@techplusmedia.co.in](mailto:kalpana@techplusmedia.co.in)

**MARKETING OFFICE:**  
 10 UF, West Wing, Raheja Tower,  
 MG Road, Shanthala Nagar, Ashok Nagar,  
 Bengaluru, Karnataka-560001

**Delhi:** 91-8178321837 | **Mumbai:** 91-98997 01316  
**Kolkata & Guwahati:** 91-9331072026  
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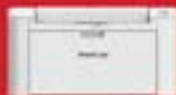
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