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# GLOBAL COMPUTE REFRESH IN 2026

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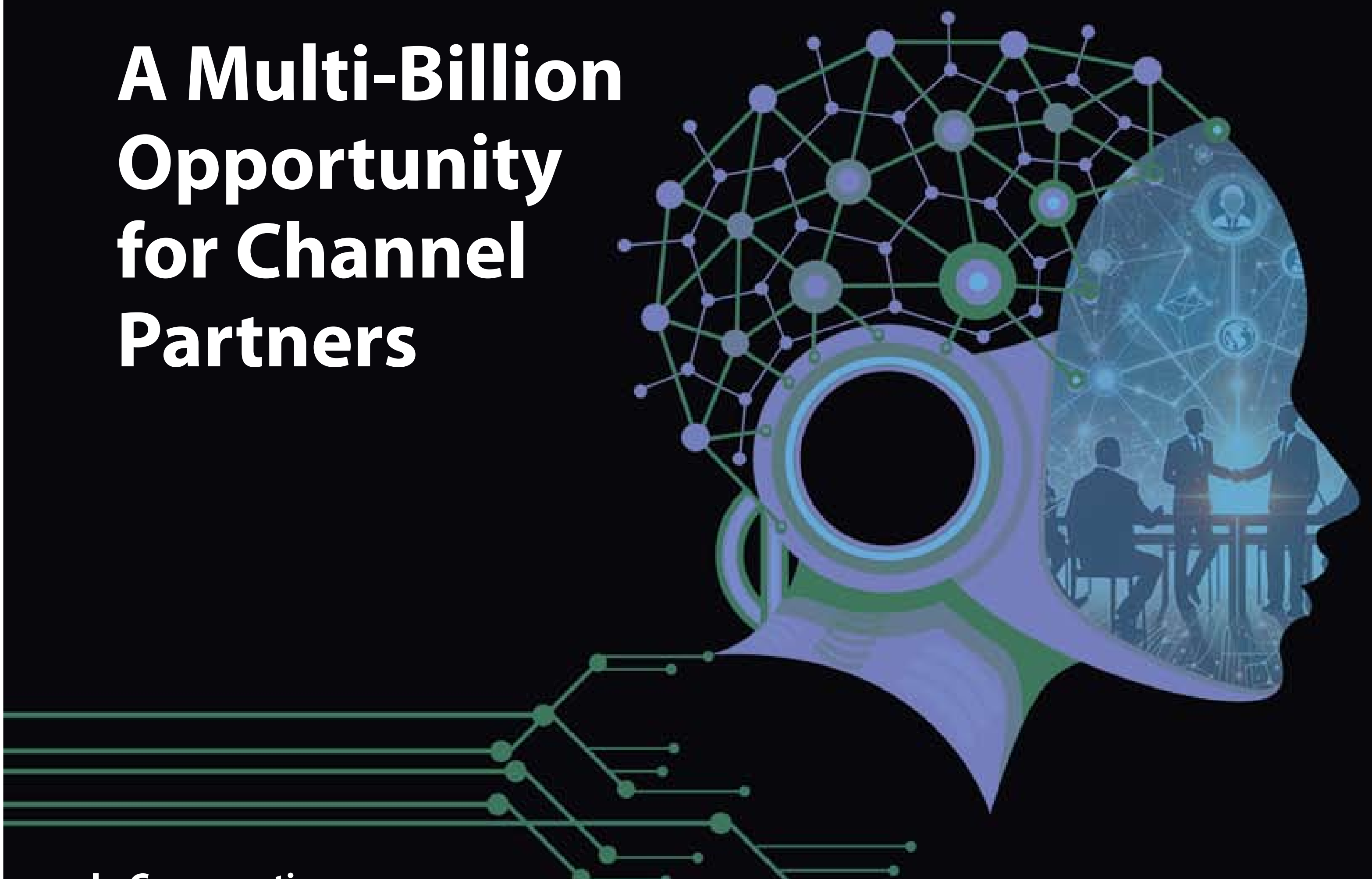

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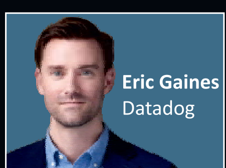


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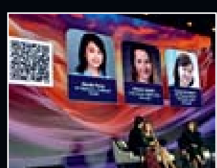

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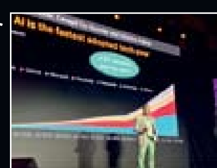

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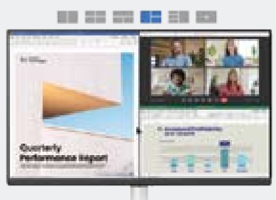

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# GLOBAL COMPUTE REFRESH IN 2026

## A Multi-Billion Opportunity for Channel Partners

For the last decade, the dominant narrative in enterprise IT was simple: move to the cloud. It promised agility, faster deployment, a friendlier OpEx model, and the ability to escape the constraints of legacy data centers. But by 2025, a growing number of organizations quietly started running into a hard reality cloud wasn't always cheaper, and it definitely wasn't always predictable. At the same time, generative AI exploded into the enterprise stack, bringing with it an unprecedented hunger for compute. These two forces together are now setting up what looks like a global compute refresh boom in 2026, and channel partners—GSIs, MSPs, and VARs are right in the blast zone of opportunity.

Many enterprises have discovered that cloud bills are not just large, they are volatile. A significant percentage of organizations exceeded their cloud budgets in the last couple of years, driven by underutilized resources, premium managed services, complex pricing, and expensive data egress. Several high-profile cases have emerged where companies moved substantial workloads out of the public cloud and onto their own infrastructure, cutting millions from annual spend. One firm publicly shared that by shifting core workloads off public cloud and back on-prem, it reduced yearly infrastructure costs from the low millions to nearly a third of that number in under a year. Another large digital business reported savings of tens of millions of dollars over a two-year period by building its own data centers for storage and compute instead of relying exclusively on hyperscale providers. These are not isolated anecdotes—they reflect a broader rethinking of which workloads genuinely benefit from cloud, and which are simply renting compute forever at a premium.

The economics are fairly straightforward. For bursty, elastic, short-lived workloads, cloud remains compelling. But for steady-state workloads that run 24/7, especially those that generate or process large volumes of data, the meter never stops. At a certain scale, the total cost of operating in public cloud begins to exceed the cost of owning and operating equivalent on-premises infrastructure amortized over several years. Analysts often describe a tipping point: once cloud spend for a given workload crosses a certain ratio relative to a comparable owned environment, it makes more financial sense to invest capex in infrastructure. Generative AI has pushed many enterprises closer to that tipping point faster than expected. AI is not a normal workload. Training and serving large language models, running personalized recommendation engines, real-time fraud detection, autonomous systems, and high-resolution analytics all demand dense clusters of GPUs or AI accelerators, high-bandwidth networking, and low-latency access to large datasets. Running this entirely in the public cloud is convenient at the prototype stage, but once organizations move into continuous training, large-scale fine-tuning, and real-time inference across millions of users or records, the monthly AI bill can become eye-watering. There are already organizations that

have spoken openly about AI-related cloud bills in the tens of millions per year, and they are now exploring private AI infrastructure as a way to regain control.

That is why the center of gravity for many AI initiatives is shifting toward hybrid and on-prem environments. A large and growing share of AI-related infrastructure spending is now going into on-premises systems rather than cloud-only solutions. Recent market data on high-performance computing and AI infrastructure shows that on-prem "HPC-AI" systems now account for several times the spend seen in cloud-based HPC and AI services. Organizations are building their own AI clusters with GPU servers, specialized accelerators, fast storage, and high-speed interconnects, often mimicking hyperscaler-style architectures inside their own facilities. The logic is simple: if you know you will be running AI workloads intensely for years, it can be cheaper and more controllable to own the compute rather than rent it indefinitely. This shift is not purely about cost. Data gravity, regulation, security, and latency all play a role. Certain industries such as financial services, healthcare, and public sector operate under strict rules around data residency, sovereignty, and privacy. Keeping data on-premises and bringing compute to that data, instead of moving sensitive information to the cloud, simplifies compliance and reduces risk. Latency-sensitive applications like factory automation, connected vehicles, or real-time video analytics benefit from compute being closer to where data is generated, often at the edge or in local data centers. There's also a resilience and control argument: organizations burned by major cloud outages and policy changes have begun to ask if it is wise to outsource too much of their core infrastructure.

All of this is driving a new appetite for modern, AI-ready data centers. That appetite is very visible in how major OEMs have repositioned their portfolios. Large infrastructure vendors now talk openly about AI driving the largest infrastructure refresh cycle in decades. They are rolling out reference architectures for "AI factories," turnkey stacks that include GPU-accelerated servers, high-performance storage, fast networking fabrics, and software for managing AI workloads on-premises. Some vendors highlight internal analyses showing that running certain AI workloads on their on-prem solutions can be significantly more cost-effective over time than running the same workloads on general-purpose public cloud services. Others have launched private AI cloud offerings that deliver a cloud-like experience on dedicated gear in customer data centers.

Networking vendors are seeing similar tailwinds. AI workloads are incredibly demanding on east–west traffic within the data center, and many existing network fabrics simply are not designed for the kind of bandwidth and latency AI clusters need. As a result, there is strong demand for next-generation data center switches, advanced fabrics, AI-optimized Ethernet, and integrated security at line rate. Some vendors, traditionally known for networking, now report multi-billion-dollar AI data center order backlogs, signaling just how fast enterprises are refreshing their infrastructure for an

AI-centric future. Beyond servers and switches, power and cooling have suddenly become board-level topics. Dense AI and GPU racks draw enormous power and generate significant heat. Many data centers are at or near their power and cooling limits. This is pushing organizations to consider direct liquid cooling, immersion cooling, and more efficient designs to support AI at scale without doubling energy bills. Energy is effectively becoming a strategic resource in AI-era infrastructure planning, and any expansion of compute now comes with a sustainability and efficiency lens.

The sectors driving the earliest and largest waves of this refresh are those with both heavy data use and strong AI ambitions. Financial services firms are modernizing infrastructure to support advanced risk modeling, fraud detection using AI, and hyper-personalized customer analytics, while staying compliant with regulatory demands around data handling. Healthcare and life sciences organizations are investing in infrastructure for AI-assisted diagnostics, medical imaging, genomics, and drug discovery, where data sensitivity and performance both argue for strong on-prem or sovereign environments. Manufacturers and automotive companies are upgrading their environments for smart factories, digital twins, generative design, and autonomous systems, all of which depend on reliable, low-latency compute close to production lines and development environments. Public sector and defense agencies are upgrading as well, driven by national security, sovereign AI strategies, and the need for secure, often air-gapped compute environments.

Analysts consistently describe this moment as a convergence: unprecedented AI demand, accumulated technical debt in legacy infrastructure, and mounting cloud cost pressure are colliding to trigger a broad modernization wave. Global IT spending projections for the next year show some of the fastest growth rates in decades, with data center systems and AI-related infrastructure among the fastest-growing segments. Spending on AI infrastructure is expected to grow aggressively year-on-year for the rest of the decade, and a growing share of that spend is earmarked for hybrid and on-prem projects rather than pure public cloud. There is also a recurring theme in surveys of CIOs and IT leaders: most organizations see the potential of generative AI, but a large majority believe their current infrastructure is not ready and that a foundational overhaul is needed if AI is to deliver meaningful impact. For channel partners, this is not a "nice to have" trend—it is a window. GSIs, MSPs, and VARs sit in exactly the right place in the ecosystem to translate this refresh into revenue and long-term strategic relevance. But doing so requires adaptation.

First, there is enormous opportunity around cloud cost optimization and workload placement strategy. Many enterprises now want partners who can analyze their current cloud spend, model total cost of ownership across cloud and on-prem options, and recommend which workloads should stay in the cloud, which should move to a private cloud or colocation environment, and which

should run in customer-owned facilities. That advisory motion—combined with execution of migrations and modernization—can become a significant consulting and integration business on its own. It also sets up the partner as a long-term trusted advisor. Second, channel partners need to build deep competence in AI infrastructure. It is no longer sufficient to know generic server and storage sizing; partners are expected to understand GPU and accelerator options, AI networking designs, storage architectures for large datasets, and the software ecosystem around MLOps, observability, and security for AI workflows. Many vendors are offering training, labs, and certifications around AI infrastructure specifically because customers are demanding credible expertise. Partners that invest in upskilling now can position themselves as the default choice for on-prem and hybrid AI builds. Those that don't risk being sidelined by more specialized firms.

Third, partners should embrace verticalization. The refresh is not abstract; it is anchored in concrete business problems. A healthcare provider has very different constraints and goals than an automotive manufacturer or a national ministry. Channel partners that package solutions and services around industry-specific outcomes—faster claims decisions, reduced fraud losses, improved factory uptime, faster clinical trial analytics—will stand out from those merely quoting hardware. This often means assembling repeatable blueprints: a reference design, a bill of materials, pre-integrated software, and a services playbook tailored to a given vertical.

Fourth, there is a massive opening in managed and "cloud-adjacent" services for on-prem infrastructure. Many enterprises do not want to go back to the old model of managing everything themselves. They still want the operational simplicity of the cloud. This is where MSPs and VARs can offer managed private cloud services, managed AI clusters, hybrid management platforms, and edge infrastructure management. Operating and optimizing this new wave of infrastructure over its lifecycle creates recurring revenue and strengthens the partner's position at the center of the customer's IT strategy.

Finally, addressing power, cooling, and sustainability is becoming part of the partner value proposition. As organizations deploy more compute for AI, they cannot simply double energy consumption without facing internal and external scrutiny. Channel partners that can advise on, design, and deliver more efficient data center solutions whether through modern hardware with better performance per watt, liquid cooling, or smarter placement of workloads will have an advantage in large deals. Some customers will explicitly prefer partners who can demonstrate how their proposed architecture supports both AI growth and ESG goals.

Put simply, 2026 is shaping up not just as another refresh cycle, but as a structural reset of how enterprises think about compute. The story is no longer "move everything to the cloud and be done." The new storyline is "place each workload where it delivers the best combination of cost, performance, control, and compliance." That naturally leads to hybrid architectures and a renewed role for on-prem and edge infrastructure. Channel partners who understand this shift, build the right skills, align with the right OEM programs, and design services around AI and hybrid infrastructure will find themselves in the middle of a multi-year growth wave. Those who treat AI as just another buzzword and ignore the infra implications risk watching the opportunity pass them by. Channel partners should be preparing now for a compute refresh boom powered by AI, disciplined by economics, and executed through the hybrid enterprise.

# Observability, Security Intelligence & AI: Inside Datadog's APAC Partner Motion

**As cloud complexity and AI adoption accelerate, CXOs are demanding a single, integrated layer for real-time visibility, security context, and AI-driven insights across the entire stack. In this exclusive conversation, Anuj Singhal speaks with Eric Gaines, the Channel & Alliances Director for Asia Pacific at Datadog on why end-to-end observability is now mission-critical, how Datadog is scaling its partner-centric strategy across APAC (with a strong emphasis on India), and why AI reliability and governance are quickly becoming board-level conversations.**

ERIC GAINES,
the Channel & Alliances Director
for Asia Pacific, Datadog

**Eric, you've had a long and successful career shaping the channel ecosystem across APAC. What pulled you into the partner ecosystem—and what keeps you passionate about it even today?**

Eric: I was fortunate to start in IT infrastructure at Hewlett Packard, which was deeply partner-centric in how it went to market. That shaped my approach to how business gets done successfully. HP also gave me exposure across multiple technology domains—IT infrastructure, data technologies, and software—where I took my first dedicated partnering role.

I genuinely fell in love with partnerships because it's one of the few professions that lets you pour yourself into almost every part of a business. You work across marketing, sales, technology, enablement, deal-making, and negotiations. It's full-spectrum. And partners bring deep, diverse capabilities and use cases—so if you have intellectual curiosity, partnerships is one of the best seats in any organization. You get exposure to industries, intelligent use cases, and practical application of technology at scale.

**Why is end-to-end observability becoming mission-critical for CIOs and CTOs—especially as cloud complexity and AI adoption increase?**

Eric: Observability evolved from traditional monitoring and IT operations. Over time, teams moved from reactive operations to anticipating performance and availability issues. Tools started using more data sources—beyond system metrics—such as application performance and log data. Observability was born from bringing these sources together to create meaningful correlations at scale.

As systems became more distributed and ephemeral—especially through agile development, microservices, and modern architectures—the need to observe what's happening became more powerful, but also more complex. There are many architectures and data sources to monitor now.

Datadog's approach centralized the data layer. Instead of stitching together multiple tools, the idea is: what if you had a common data layer that makes correlation easier, in real time, at scale?

More recently, observability has become relevant beyond IT operations. Lines of business want to connect system performance to business outcomes—revenue, risk, compliance. These principles also extend into security and AI. Many AI challenges are observability problems: Is what we built useful? Is it compliant? What about privacy? Are hallucinations happening too often? What is the cost relative to value? This is why observability is becoming essential to a much wider audience—even CEOs and business heads viewing the business through the lens of technology.

> “
> - Toolsets alone don't solve problems—people solve problems.
> - Many AI challenges are actually observability problems: usefulness, compliance, privacy, hallucinations, cost vs value.
> - Instead of stitching together tools, a common data layer makes correlation possible in real time, at scale.
> - Partners help de-risk transformation, reduce cost, and increase delivery velocity—when observability governs the change.”

**Datadog has announced a strong focus on APAC, especially India. What's driving the**

**expansion—and how does the partner ecosystem fit into your go-to-market strategy?**

Eric: India is an incredibly exciting part of our business. Datadog has invested heavily there over the past couple of years, and our teams have grown quickly. The problems we solve require more than toolsets. We strongly believe that tools alone don't solve problems—people solve problems, and tools are a major enabler.

As we've grown in India and worked closely with customers, we've deliberately embedded partnerships into our go-to-market. Partners help customers achieve outcomes, and ultimately that drives the success of Datadog's business. The strategy is intentionally partner-centric.

**You've spoken about helping partners diversify their revenue models. What does that look like in practice?**

Eric: We work with a wide spectrum of partners—from the largest hyperscalers to boutique specialists. In the same way we want observability to be accessible to everyone, we support many partnership models and the opportunities that open up for partners.

**Some examples:**

Advisory-centric partners helping clients navigate modern operating models, technology recommendations, compliance, and regulatory alignment. Observability tools can show how close an organization is to requirements and where they need to improve.

Value-added resellers and product experts helping clients with technology selection and procurement.

Managed service providers (MSPs) using Datadog internally to operationalize their client offerings and in many cases delivering Datadog as a managed service.

Cloud-native partners working on complex transformation programs: infrastructure modernization, cloud migration, application modernization, cloud security, data modernization. Observability is used not only for the target-state operations model, but also to govern the transition—speeding it up, de-risking it, and improving quality while reducing cost.

Partners embedding Datadog into products, and GSIs building centers of excellence for scaled delivery.

The core theme is that observability becomes a lever for repeatable delivery, governance of transformation, and higher-quality outcomes—across partner types.

1. Observability is expanding from IT ops into security, compliance, and AI governance.
2. AI reliability is now executive-level—and observability becomes the operating lens.
3. Partner value is diversifying: advisory, SI, MSP, cloud-native modernization, embedded solutions, CoEs.
4. Simplification wins: tool consolidation + unified data layer drives cost reduction and operational clarity.
5. Partner-first programs that scale (easy onboarding, clear tiers, repeatable proof-of-value motion) accelerate ecosystem growth.

**AI is changing buying behavior. How is Datadog using AI inside the platform—and how does that help partners differentiate?**

Eric: We have a clear, coherent AI strategy with two dimensions.

First, we use AI inside the Datadog platform through agents aligned to key personas—people who use Datadog daily. We call this Bits AI, and we currently have agents for SREs, developers, and security analysts. Because Datadog has years of rich, clean observability data, we can use AI to reduce time for triage, diagnosis, and service restoration. Agents can help identify where to look, generate scripts, detect threats, and recommend next actions.

This also helps enable partner teams. For example, pairing earlier-career talent with smart agents can accelerate learning—hints on where to look, suggested scripts, recommended resolutions—so capability ramps faster.

Second, we help organizations build and operationalize AI responsibly. This includes challenges like preventing prompt injection, selecting the right model based on cost and fit-for-purpose, understanding GPU utilization, token consumption, and operational behavior of AI workloads. Observing GPU utilization and costs through an observability lens helps decision-makers manage AI with discipline and governance. These workloads are best served through observability.

## How is Datadog's "partner-first" approach different from what the market has seen before?

Eric: We relaunched our sales and services partner program at the start of 2024. The aim was to make it accessible—not gatekept—so partners can sign up, train people, and get access to sales and go-to-market assets in a scalable way.

We also simplified partner tiers and benefits, and clarified pricing with partners. Another major focus was bringing account teams and partnerships closer—through streamlined opportunity registration and clear pathways to engage with Datadog teams.

A practical example is how we run a proof of value phase: once we understand a business problem, we solve it with the customer before purchases are made. Partners can shadow Datadog teams or lead this phase while Datadog supports. This builds client confidence, tightens alignment on the business problem, and accelerates skills transfer. The tighter we work hand-in-glove, the faster partners learn—and the more we learn from partners about adjacent systems and modern cloud usage.

## APAC is diverse and mature in partner ecosystems. Can you describe Datadog's footprint and where you're seeing partner momentum?

Eric: We have a large team presence in Bengaluru, and the ecosystem is fairly spread out. We see strong cloud-native partners working with modern digital-first businesses—areas like media streaming, food delivery, travel, and aviation—where adoption of modern observability is aggressive.

We also see strong local SI partners selling into banks, insurers, manufacturing, and traditional enterprises. Many of those clients have tool sprawl—multiple compelling tools that don't integrate well. That creates a major opportunity for consolidation and simplification, lowering cost and risk while improving outcomes and operational velocity.

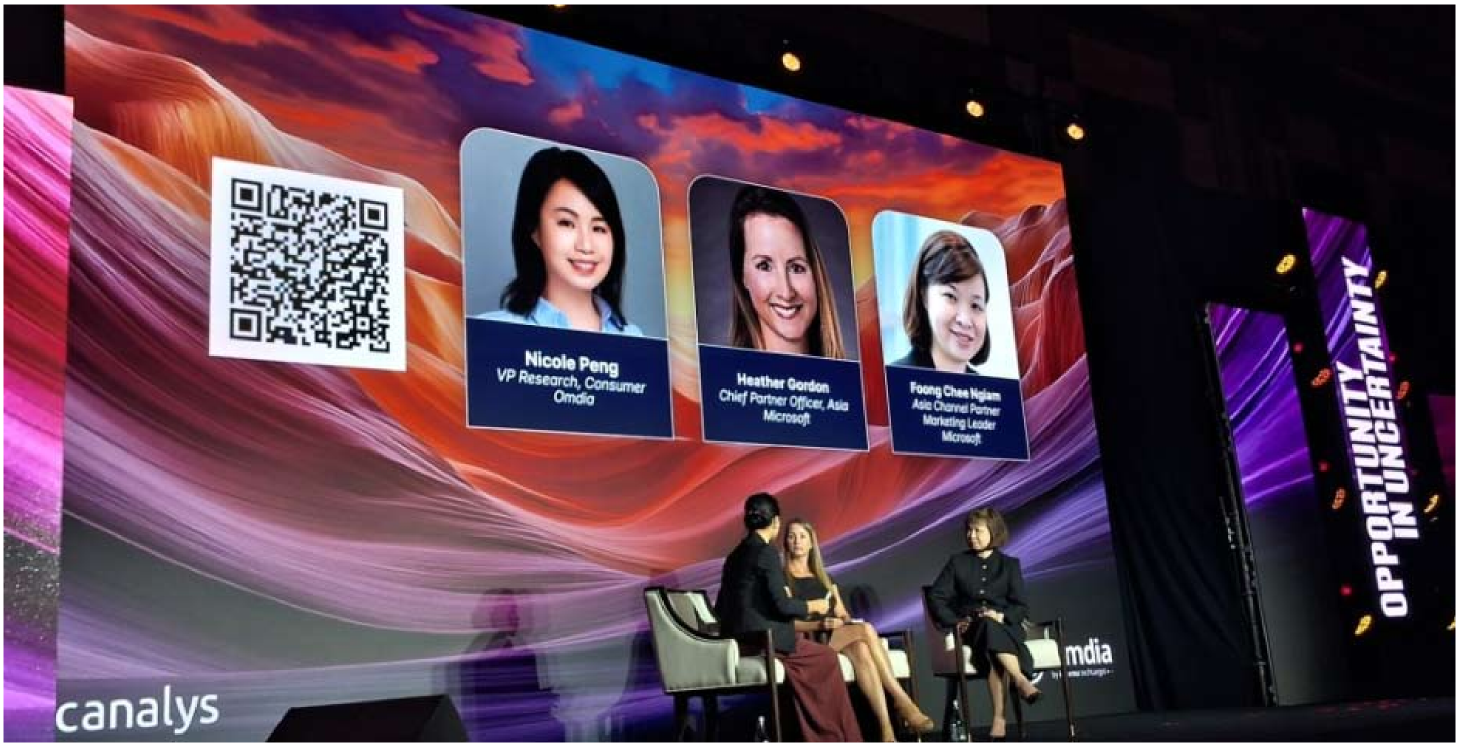
We also see GSI momentum—often hubs based in India serving domestic and overseas clients—building centers of excellence and embedding Datadog into platforms they operate for customers. Overall, adoption is diversified across customer sizes and industries, which is healthy and strategic.

## Final message to channel leaders—ISVs, MSPs, and cloud consultants watching this series?

Eric: Datadog is focused on designing for where the market is heading—not where it used to be. We meet customers where they are, and help them modernize into new ways of operating. We're building the capabilities needed 2–4 years from now.

We're taking a similar forward-looking approach to partnerships: growing core channel and alliance motions, while also recognizing that partner value delivery is evolving beyond what it was 10 years ago. India, in particular, is a key investment market because of the vibrancy and innovation coming from the region.

# Microsoft Pivots to AI Services as Asia Partners Race to Transform




At Canalys Forums APAC 2025 in Da Nang, Microsoft delivered a clear strategic message to its partner ecosystem: AI is now the central driver of channel growth, and partners must evolve from transactional resellers into outcome-driven solution providers. Speaking at the event, Foong Chee Ngiam, Asia Channel Partner Marketing Leader, Microsoft, said the company is "raising the bar on AI readiness" with new incentives, training programs, and co-funded engagements designed to help partners commercialize AI use cases faster. "This isn't about selling software," Foong said. "It's about building repeatable, scalable solutions that solve real customer problems using AI and cloud services. Partners who operationalize AI instead of just talking about it will see accelerated pipeline velocity in 2026 and 2027."

Microsoft is aligning its AI Cloud Partner Program to push partners toward service-led models, Copilot deployments, Azure AI integrations, and industry-specific automation. Heather Gordon, Chief Partner Officer, Asia, Microsoft, stressed the urgency of this shift, explaining that license-based relationships are no longer enough to sustain growth in a rapidly changing market. "Our commitment is to equip partners to deliver outcomes, not transactions," she said. "We are boosting training, specialization pathways, and business development support so partners can deliver AI projects with speed and confidence. Those who build internal capability—sales, technical, and delivery—will be in the strongest position to lead across APAC." Gordon added that structured workshops, customer assessments, and vertical solution crafting are outperforming traditional sales motions, with Microsoft seeing "significantly higher conversion rates when partners demonstrate business value, not technology features."

Microsoft's approach is designed to help partners expand beyond resale margins into recurring revenue opportunities such as AI managed services, automation projects, governance support, cloud modernization, and application innovation. Both executives emphasized that partners should use Microsoft funding to run proof-of-concept engagements and create industry accelerators, from AI claims automation in insurance to compliance analytics in financial services. The company is also prioritizing Copilot attach strategies, encouraging partners to pair productivity AI with Microsoft 365 and Azure deployments. At the forum, Microsoft reinforced that 2025 and 2026 will reward partners who invest in training, build cross-functional AI teams, and package solutions rather than offering one-off implementations. Partners that shift early will benefit from greater visibility in Microsoft programs, stronger incentive alignment, and access to high-demand enterprise transformation deals across Asia.

# Skyflow Unveils DPDP Data Privacy Vault for India

***Indian enterprises can now protect personal data, stay ahead of the 18-month DPDP deadline, and adopt AI safely.***


Skyflow, the global leader in AI data security and privacy, today announced the launch of a purpose-built solution to meet Digital Personal Data Protection (DPDP) Act's toughest technical requirements. Skyflow's DPDP Data Privacy Vault Platform helps enterprises exclusively protect personal data, govern its use, and accelerate safe AI innovation, while staying compliant with the rules.

The DPDP Rules, notified on November 13, 2025, officially mark India's shift towards a privacy-first digital economy. With only 18 months to comply and penalties reaching up to ₹250 crore (~$30 million) per violation, enterprises must modernize their personal data protection architecture now.

## The Personal Data Sprawl Problem

India's rapid digital growth has powered major advances across sectors, but it has also created massive exposure. Personal data now flows through every product, decision, and AI workflow, and in the process gets copied into countless systems. This "Personal data sprawl" shows up in app databases, logs, analytics warehouses, SaaS tools, reports, data lakes, and AI training pipelines. It's a growing risk: a 2024 Protiviti–CII survey found that only 24% of Indian organizations feel prepared for the privacy challenges posed by emerging technologies. The result is fragmented data that's nearly impossible to govern, protect, or use safely for AI with traditional security models.

ANSHU SHARMA,
CEO, Co-founder, Skyflow

## Data Protection Built for DPDP and AI

Skyflow Data Privacy Vault Platform tackles this challenge by isolating and protecting sensitive customer data in a centralized data privacy vault while securing the flow of data across datastores, agents and models.Skyflow's platform provides an architectural foundation to meet the technical requirements of DPDP rules which require system-level actions and safeguard personal data throughout its lifecycle.

Personal Data Security Safeguards: Ensures personal data stays protected across every system where it is processed. Skyflow applies advanced privacy controls including polymorphic encryption, format-preserving tokenization, masking, and obfuscation, so data remains secure throughout its lifecycle and yet usable, even when implemented in analytics or AI workflows. (Adheres to rule 6 (a, d))

Personal Data Governance: Provides engineering teams with visibility and access to fine-grained, purpose-aware controls, and reliable retention rules, with internal and external data processors. (Adheres to rule 6 (b, c, e, f, g))

Audit-Ready Compliance Reporting: Supplies immutable logs, observability and consolidated audit reports on personal data, simplifying compliance and security teams' efforts on audit & regulatory reviews. (Adheres to rule 6 (c, e))

Consent & Data Principal Rights Enforcement: Once consent is collected, ensures accurate enforcement of itemized consent updates and data principal requests consistently. (Adheres to rules 3, 14)

Privacy-First AI Enablement: Uses entity-preserving tokens to support analytics, model training, inference pipelines, and agentic AI systems without exposing underlying personal data. (Adheres to rule 6 (a))

Commenting on the announcement, Anshu Sharma, CEO and Co-founder of Skyflow said, "India has 1.4 billion people and will soon have 1.4 trillion agents with AI. Protecting the personal data of 1.4 billion people requires purpose-built infrastructure and architecture, not incremental fixes. The DPDP Act raises the bar for trust and accountability, and Skyflow helps enterprises meet it while safely adopting AI."

### Why Indian Enterprises Are Moving Now

"The notification of the DPDP Rules marks a pivotal moment in India's data privacy and governance landscape, catalysing a shift towards privacy-centric architectures and cryptographically resilient ecosystems. Organizations must now operationalize privacy vaults and dynamic access controls ensuring that personal data is not just protected but strategically leveraged with accountability and transparency. Privacy by design and robust privacy practices become a cornerstone of organizational excellence and a differentiator in building stakeholder trust." — Murali Rao, Senior Partner and Leader, Cybersecurity Consulting, EY India

"Customer privacy and data security is one of our core values at Urbanic. Skyflow enables us to meet compliance requirements while ensuring our customers' personal data is handled with the highest standards of security." — Ashutosh Sharma, GM Strategy and Product Ops, Urbanic

"At Dezerv, data privacy has never been a mere compliance tick-box. We took a proactive approach by integrating with Skyflow to tokenize client PII and strengthen investor trust." — Rishikesh Bhise, Head of Policy and Governance, Dezerv

--As the 18-month compliance window begins, organizations that embrace data privacy vault platform today will emerge tomorrow as leaders in India's AI-driven economy and protect as well as improve their own customer lifetime value.

# Savex Technologies Announces Strategic Distribution Collaboration with IBM to Accelerate India's Hybrid Cloud and AI Adoption

Savex Technologies Pvt Ltd, one of India's leading Information and Communication Technology (ICT) distribution houses, today, solidified its commitment to expanding its enterprise technology portfolio by announcing a strategic distribution collaboration with IBM. This collaboration is designed to empower Savex's extensive network of over 10,000 partners with access to IBM's complete suite of Hardware, Software, Cloud, and Services solutions, reinforcing India's digital transformation across all market segments.

### Commitment to Channel Enablement and Growth:

Central to this collaboration is Savex's commitment to enabling its channel ecosystem.

YUKTI PUNJABI,
Director – Ecosystem, IBM India & South Asia

The company will appoint dedicated technical resources to support and enable new business growth, ensuring partners have the necessary expertise:

- **Dedicated Teams:** Establishing teams to handle both pre-sales and post-sales customer support.
- **Partner Training:** Conducting focused enablement training sessions to equip partners, including those in smaller cities, with the knowledge and skills required to successfully pitch and sell IBM solutions.
- **Logistics and Reach:** Utilizing its robust logistics and ability to deliver in over 750 cities across India, supported by 39 sales offices and 42 stock locations.

### Executive Commentary

"We have transformed the IBM Ecosystem to be a multi-billion-dollar growth engine to capitalize on the AI and hybrid cloud market opportunity. Partners like Savex are at the heart of IBM's transformation and growth, helping us leverage our combined expertise to serve our client's needs. With this collaboration we will leverage Savex's large network of partners to drive IBM technology and scale in emerging markets," said Yukti Punjabi, Director – Ecosystem, IBM India & South Asia.

ATUL GAUR,
Director,
Savex Technologies

Atul Gaur, Director for Savex Technologies Pvt Ltd, said: "With this strategic collaboration, we will empower our enterprise partners to build and deploy cloud-native applications and enable their customers for managing and running their solutions and services effectively with all benefits of the cloud. As partners have always been central to our business growth strategy, this new and expanding IBM-centric capability will enable us to address specific needs of our mutual customers across the country. Savex's deep expertise in modern technology platforms and rigorous process control will be continually leveraged to ensure the resounding success of this collaboration."

# Redington Partners with COUGAR Gaming under Red.Gaming, to Drive Next-Level Gaming Solutions in India

Redington Limited, a leading Indian integrated technology solutions provider and a Fortune India 500 company, proudly announces a strategic partnership with COUGAR Gaming under Red. Gaming, marking the brand's first-ever presence in India. It aims to unlock access to full lineup of COUGAR Gaming's cutting-edge gaming products, including high-performance PC components, gaming chairs, peripherals, and power supplies, to the rapidly growing Indian gaming market.

COUGAR Gaming is globally recognized for its disruptive innovation in gaming hardware and furniture design, aimed at empowering gamers to elevate their experience. With nearly 40 years of industry engineering experience through its parent HEC Group, COUGAR Gaming delivers award-winning designs and technologies that drive performance and creativity in gaming.

Redington's exclusive go-to-market (GTM) partnership with COUGAR Gaming will support its vast distribution network and marketing expertise to firmly establish COUGAR Gaming's brand presence across India. Redington will support COUGAR Gaming through a comprehensive set of marketing initiatives designed to engage the gaming community and channel partners, ensuring widespread accessibility and awareness.

"Our partnership with COUGAR Gaming positions us strongly to unlock next in the fast-evolving Indian gaming landscape. By bringing COUGAR Gaming's innovative and comprehensive gaming lineup exclusively to India via Red.Gaming, we are enabling market reach, opening new revenue streams, and fostering continuous innovation. This collaboration exemplifies how Redington drives sustainable business expansion, strengthening our commitment to revolutionize gaming experiences across the country." – Raghu Ram, Senior Vice President, ESG, Redington Limited.

**RAGHU RAM,**
**Senior Vice President, ESG, Redington Limited**

"India represents a vibrant and fast-growing market for gaming, and we are thrilled to officially enter this space with Redington as our exclusive partner. Together, we aim to build COUGAR Gaming's brand presence and cater to the evolving needs of Indian gamers by offering innovative, high-quality products that push the boundaries of gaming experiences. We look forward to a successful collaboration that brings our unique philosophy of 'In Pursuit of Different' to India's gaming community," – said Chandan Singh, Country Manager India, COUGAR Gaming

**CHANDAN SINGH,**
**Country Manager India, COUGAR Gaming**

This partnership underscores Redington's sustained commitment in continuously expanding its brand ecosystem with innovative products. With COUGAR Gaming joining the Red.Gaming portfolio, Redington strengthens its position across lifestyle segments.

# Rx Infotech Unveils Its New Logo, Marking a Bold Step in Its Brand Evolution

***Blending Legacy with Innovation, the New Identity Reflects Rx Infotech's Journey of Progress and Purpose.***

Rx Infotech, a leading name in the sector of technology and innovation, proudly announces the launch of its new logo – a notable symbol that represents the company's evolution, growth, and future vision.

This new identity marks a major milestone in Rx Infotech's journey, reflecting its transformation into a forward-thinking and innovation-driven brand that continues to empower users and businesses through advanced technology solutions.

"We're unveiled our new logo, which represents more than just a visual change, it's a reflection of who we are and the direction from where we're heading," said Atul Gupta, Director Rx Infotech.

He further added, "It is built from our spirits of innovation, our commitment to technology, and our focus on enhancing the human experience."

ATUL GUPTA,
Director, Rx Infotech

The redesigned logo carries a contemporary touch, symbolizing Rx Infotech's adaptability in a developing tech landscape. The new logo carries a powerful journey of sharp vision with help of design elements, with a touch of modern typography that reflects the company's energy, creativity, and progressive mindset.

The rebranding initiative is part of Rx Infotech's broader vision to strengthen its identity as a customer-first, innovation-led organization. The new logo serves as a bridge between the company's rich legacy and its future-forward ambitions, celebrating its continuous journey of technological excellence and human-centric innovation.

"Our refreshed identity signifies agility, trust, and transformation. It marks our evolution from a product-focused company to a holistic tech solutions brand," added Atul Gupta, Director, Rx Infotech.

As the new branding rolls out across digital platforms, packaging, and communication touchpoints, With the new identity, customers will experience a more cohesive and inspiring brand journey.

The company happily acknowledged the support by all the stakeholders, partners, and customers who joined in celebrating this milestone and witnessed the unveiling of a new chapter in the Rx Infotech journey.

# Nutanix CEO Rajiv Ramaswami: "We Have an Opportunity to Scale Faster Through the Channel"

Nutanix is signalling its strongest channel push yet, with CEO Rajiv Ramaswami calling the current market environment a "transformational moment" for partners worldwide. In a recent conversation, Ramaswami emphasized that Nutanix is entering a period of accelerated growth driven almost entirely by the partner ecosystem. "We have an opportunity to scale faster through the channel," he said, highlighting a strategic shift that places VARs, distributors, MSPs, and cloud integrators at the centre of Nutanix's 2025 expansion plans.

With enterprises rapidly re-evaluating their virtualization, cloud, and hybrid infrastructure strategies, Nutanix is witnessing a large migration wave—particularly from customers transitioning away from legacy VMware environments. The CEO noted that this shift is creating significant demand for alternative platforms that are simpler, more cost-effective, and future-ready. "The rate at which VMware customers are coming to us has increased meaningfully," Ramaswami explained. "This is a very strategic opportunity for our partners to step in and lead modernization projects."

Ramaswami believes that partners today are positioned to unlock far more than resale margins. As organizations embrace hybrid multi-cloud and prepare for AI workloads, the need for consulting, migration, modernization, and managed services is expanding. "Partners have always been central to our model," he said. "But now more than ever, customers want advisors who can help them navigate change, not just sell them technology."

According to Nutanix, the channel has a multi-layered growth opportunity: assisting enterprises with virtualization exits, designing hybrid cloud architectures, enabling AI-ready infrastructure, and delivering long-term managed services for operations and optimization. Ramaswami stressed that the company's 100 percent channel-first strategy gives partners full ownership across sales, implementation, expansion, and renewals. "We only grow when our partners grow," he added. "This alignment is core to how we serve the market."

For the channel community—especially in APAC and India—this convergence of market momentum and vendor support represents a rare window. As enterprises accelerate cloud transformation and AI adoption, Nutanix believes partners who invest early in capability and specialization stand to benefit the most. "This isn't just a moment of disruption," said Ramaswami. "It's a moment of creation. Partners who lean in now will build the next decade of enterprise infrastructure."

RAJIV RAMASWAMI,
CEO, Nutanix

# Tech Trailblazers: India's Partner Marketing Power List 2025

In today's hyper-competitive tech landscape, partner marketers are the unsung architects of growth. They are ecosystem orchestrators, brand amplifiers, alliance storytellers, and demand-generation maestros who transform vendor–partner relationships into billion-dollar opportunities.

These leaders don't just run campaigns; they design influence, ignite trust, and mobilize entire ecosystems to accelerate cloud adoption, cybersecurity readiness, and digital transformation across India.

At the frontline of this revolution are India's partner marketing trailblazers — shaping how the world's biggest tech companies collaborate, co-innovate, and capture market share in one of the most dynamic digital economies on the planet. Meet the rainmakers of partner marketing who are rewriting the rules of the game in India.

## NIKHIL SHARMA, AWS

Driving partner success in the world's largest hyperscaler, Nikhil has become synonymous with enabling India's cloud ecosystem through scalable co-marketing and enablement.


## KULDEEP SEHRAWAT, IBM

Driving IBM's partner marketing play, Kuldeep ensures the tech giant's alliance ecosystem stays front and center in conversations on hybrid cloud and AI.

## ASHISH SHAH, Google Cloud

At the helm of partner marketing for Google Cloud in India, Ashish is known for curating campaigns that highlight joint innovation stories with customers across industries.

## TARUN GOYAL, Dell Technologies

A veteran in channel and partner storytelling, Tarun ensures Dell's extensive partner base stays engaged, competitive, and aligned to the hybrid cloud future.

## SWARNIM DAMANI, Commvault

Championing data protection and backup as a business enabler, Swarnim leads Commvault's partner ecosystem with an eye for storytelling and co-created customer wins.

## SUJAY SHETTY, HPE Networking

Sujay spearheads HPE's Global SIs Partner Marketing strategy, keeping the company's alliance ecosystem at the forefront of conversations around HPE Networking – Aruba and Juniper. His focus on strategic engagement with system integrators, co-creation initiatives, and ecosystem positioning has been instrumental in establishing HPE Networking as a powerful growth engine for enterprises.

## CHITIZ GUPTA, Nutanix

At Nutanix, Chitiz is a driver of the "cloud operating model" narrative in India, working closely with partners to amplify hybrid cloud transformation.

## MOHAMMED WASIF,
### SAP

SAP's Partner Marketing Director, Wasif anchors partner-led growth by aligning the SAP ecosystem with digital transformation priorities in India Inc.

## ABHISHEK SHUKLA,
### Salesforce

As Salesforce scales in India, Abhishek leads partner marketing with a focus on ecosystem enablement and joint customer wins.

## SATISH NAIR,
### CISCO

At Cisco India, Satish is known for building narratives that highlight how partner collaboration accelerates digital infrastructure growth.

## B. C. NACHIKETH,
### Palo Alto Networks

As Enterprise & Value Partner Marketing Manager for India & SAARC, Nachiketh has made partner-led campaigns a core pillar of Palo Alto's growth story.

## NISHITH SAMPAT,
### NTT

Known for his deep expertise in revenue marketing and partner co-innovation, Nishith is a standout in the partner marketing leadership community.

## KAMIA WAHI,
### Apple India

As Partner Marketing Lead, Kamia drives Apple's India strategy across notebooks and PCs, ensuring partners are central to Apple's growth narrative.

## JASON ALBERT,
### Akamai

Leading partner marketing at Akamai India, Jason crafts narratives around content delivery and security powered by a robust partner base.

## VIVEK DUVEDI,
### Snowflake

A strong advocate of the modern data stack, Vivek is shaping Snowflake's India ecosystem through compelling joint GTM initiatives with partners.

## KRISHITA MOTWANI, ServiceNow India

Krishita accelerates GTM synergy by empowering the partner ecosystem and leading co-marketing programs with global system integrators. Her emphasis on strategic collaboration, co-creation initiatives, and ecosystem positioning has been pivotal in strengthening ServiceNow's role as a transformative growth engine for enterprises

## TAMANNA TASNEEM,
### Lenovo India

A force in partner and channel marketing, Tamanna ensures Lenovo's expansive partner base translates into market leadership.

## SAMSON ISSAC,
### NetApp

Leading NetApp's alliances and partner marketing in India, Samson is recognized for spotlighting partner success in hybrid cloud and storage.

What unites this diverse set of leaders is a shared ability to turn marketing into an engine of trust, scale, and revenue. They don't just amplify brand messages; they enable ecosystems, empower partners, and energize markets. In a country where ecosystems determine success, these rainmakers prove that partner marketing is no longer the "back office of demand gen" but the frontline of digital growth.

India's partner marketing leaders are not just keeping pace with change — they are defining it.


# ISODA's TechSummit TS XIV 2026 Signals Bigger Scale, Stronger Channel Influence

The Infotech Software Dealers Association (ISODA) is reinforcing its growing stature within India's IT channel ecosystem with the closure of delegate registrations for TechSummit TS XIV 2026, scheduled to be held in Almaty from 17 to 21 February 2026. With over 100 confirmed founders, business owners, and senior decision-makers, the upcoming edition reflects the largest and most strategically curated delegation in the summit's history.

Over the years, TechSummit has evolved from a networking forum into a high-impact leadership platform where India's channel heads align on growth, partnerships, and global expansion. The 2026 edition, anchored around the theme "Vision, Velocity and Value," underscores ISODA's intent to deepen the quality of dialogue while expanding the summit's scale and international relevance.

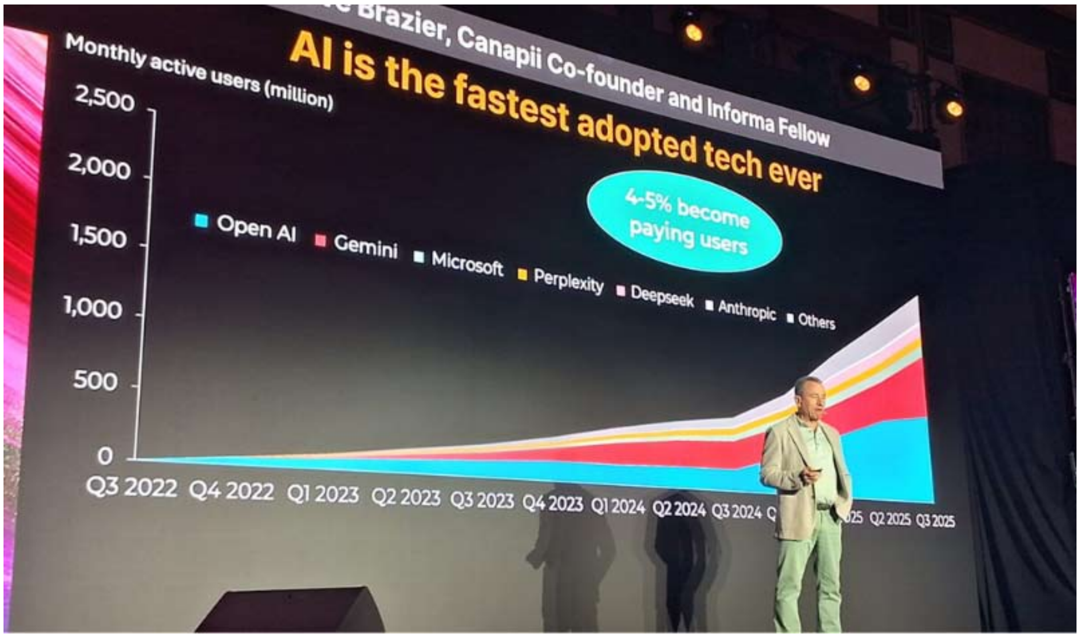
The attendee mix at TS XIV highlights ISODA's expanding influence across the partner ecosystem, bringing together CEOs, Directors, and CXOs from System Integrators, Value Added Distributors, Solution Providers, cybersecurity-focused firms, and cloud-first organisations. This senior-only participation model continues to differentiate TechSummit from conventional industry events and positions it as a closed-door forum for strategic decision-making.

With delegate registrations now closed, ISODA has opened select sponsorship opportunities for technology OEMs, cybersecurity vendors, cloud service providers, distributors, and SaaS innovators seeking direct engagement with India's most influential channel leaders. Sponsors are offered structured access to decision-makers, curated interaction windows, and consistent visibility across summit programming, aligning brand engagement with meaningful business conversations rather than passive exposure.

Beyond networking, TechSummit TS XIV is expected to shape key narratives around the future of the Indian IT channel, cross-border collaboration, partner-led digital transformation, and emerging technologies defining the 2026 roadmap. The choice of Kazakhstan as the host destination further reflects ISODA's ambition to position its members within a broader global context.

As ISODA continues to scale both participation and influence, TechSummit TS XIV 2026 stands as a clear indicator of the association's growing role in shaping India's channel-led technology landscape. For sponsorship enquiries or media participation, interested stakeholders may contact the ISODA Management Committee

# AI Boom and Hyperscaler CapEx Reshape APAC Channel Future – Insights from Canalys Forums APAC 2025




The Asia–Pacific channel ecosystem is entering a new era of transformation as artificial intelligence accelerates faster than any technology in recent history and hyperscalers inject record investment into digital infrastructure. Multiple sessions at the Canalys Forums APAC 2025 revealed a clear strategic signal: partners that evolve into AI-driven service organizations will advance, while transactional, margin-dependent players risk falling behind.

"Opportunity in Uncertainty" — Steve Brazier's Market Signal. In his keynote, Steve Brazier, Informa Fellow and Co-founder of Canapii, underscored the unprecedented pace of global AI adoption. Speaking in a session titled Opportunity in Uncertainty, he noted that AI is the fastest technology ever adopted, with 4–5 percent of users converting into paying customers  a rate that far surpasses earlier digital waves. Consumers are proving willing to pay for premium AI services, enabled by rapid innovation cycles from companies such as OpenAI, Gemini, Microsoft, Perplexity, Deepseek, and Anthropic. Brazier highlighted that hyperscaler capital expenditure has become the backbone of this growth. In 2025 alone, hyperscalers committed a record USD 616 billion in CapEx. AWS, Google, Meta, and Microsoft accounted for USD 361 billion of this total, as demand for high-performance compute, GPU capacity, sovereign cloud, and AI workloads continues to surge. Sovereign AI investments are projected at USD 75 billion, while neocloud providers will invest an estimated USD 181 billion to expand AI-ready platforms.

## Two-Speed Channel Reality Sheena Wee on Partner Divergence

Sheena Wee, Principal Analyst at Omdia, speaking at the forum, said the APAC channel is now operating at two distinct speeds and the gap is widening every quarter. Some partners are rapidly scaling with high-growth technologies, new consumption-based vendor programs, and AI services. Others are slowing down due to shrinking incentives, tighter margins, and increasing operational complexity. Wee emphasized that vendor programs, go-to-market strategies, and transactional incentives are simultaneously fueling growth and triggering consolidation. Currency volatility remains a major concern for partners, affecting pricing, profitability, and planning cycles. In this climate, she said, vendors must clearly communicate the business value they deliver to partners, not just product features or margin tables.

## AI Capabilities Become Core Channel Differentiators

According to Omdia insights presented at Canalys Forums APAC 2025, 49 percent of channel partners are currently developing AI use cases and customer solutions, reflecting a decisive pivot toward innovation. Partners are:

- Building internal AI skill sets
- Investing in AI-led transformation of their own operations
- Creating virtual demo labs and pre-configured solution environments
- Pursuing specialized M&A for AI competency building

The message is clear: experimentation is giving way to structured AI solution development. Ability to respond quickly to AI-driven customer needs is no longer optional — it is a prerequisite for pipeline and profitability through 2026–2028.

## APAC-to-APAC Service

## Delivery to Triple by 2028

One of the strongest forecasts revealed at the event was the growth of cross-border service delivery within the APAC region. By 2028, the number of APAC partners providing regional service delivery will triple, driven by:

- The rise of regional delivery hubs
- Demand for consistent service quality across multiple markets
- Multinational enterprises seeking integrated capabilities

Wee said vision, specialization, collaboration, and geographic positioning will determine which partners gain competitive advantage in this new delivery landscape.

## The Road Ahead — Specialization Beats Scale

The Canalys APAC forum narrative shows a channel ecosystem split between acceleration and rationalization. Partners that lean into specialization especially in AI, governance, cross-border delivery, cybersecurity, and modernization services are positioned for rapid expansion. Those tied to legacy resale or first-level transactional models may confront contraction and consolidation pressures.

As AI reshapes customer expectations and hyperscale investments redefine digital infrastructure, the winning equation for APAC partners will be:

AI + Services + Regional Delivery + Vendor Alignment.

The Canalys 2025 messaging landed a decisive conclusion: uncertainty is real, but so is opportunity and the future of channel growth will be created by those willing to pivot early and invest in AI-ready service capability.



# NEW WAVE OF HARDWARE DEMAND IN 2026 DRIVEN BY AI COMPUTE

A new momentum is building across enterprise infrastructure planning, and it is no longer just about cloud footprints or migration timelines. As 2026 unfolds, a clear trend is emerging organizations are once again investing heavily in physical hardware. The quiet resurgence began when generative AI workloads scaled beyond pilot environments. Cloud GPU rentals served early experimentation, but as models evolved into production systems running day and night processing customer journeys, risk scoring, vision analytics, and real-time inferencethe economics began to shift. What once felt boundless and elastic suddenly became expensive to maintain. Many enterprises have started placing orders for dedicated GPU clusters, storage accelerators, and high-bandwidth networking gear, signaling a return to ownership-based compute economics rather than indefinite cloud dependency.

Procurement teams who previously focused only on SaaS and reserved cloud instances are now negotiating with OEMs for long-term hardware capacity. This recalibration is driven by a simple realization: AI at scale is not a SaaS workflow it is a compute-intensive engine. When inference becomes continuous and data volumes balloon, the economics of renting compute indefinitely begins to strain budgets. CIOs are now running total cost comparison models that show multi-year ownership of GPU servers, amortized over lifecycle, delivering more predictable spend and better cost-to-performance ratios. In addition, enterprises want control—over latency, over data movement, and over IP security. Running models in-house provides control that cloud isolation alone can't fully guarantee. The market sentiment is shifting from cloud-exclusive to cloud-prudent. But the resurgence in hardware spending is not just a finance story; it is an engineering challenge. IT leaders quickly learn that buying GPUs is only the first step. AI-heavy workloads demand power-dense racks, advanced cooling, high-speed fabrics, and storage designed for parallel ingestion. Traditional data centers built for virtual machines and web traffic struggle under the thermal footprint of accelerated compute. Organizations planning GenAI scale-ups in 2026 are now working on power expansion, liquid cooling conversations, floor reinforcement for dense racks, and network redesigns capable of handling the lateral data flow AI clusters require. Infrastructure teams that once worried about VM sprawl now talk about megawatts, heat exchange loops, and InfiniBand integration.

This shift marks a milestone in enterprise architecture maturity. After years of cloud euphoria, leaders are acknowledging that transformation is not a one-direction journey it is a balancing act. Cloud remains the innovation platform and scaling muscle, but AI is pulling compute back home, closer to data, closer to security boundaries, and closer to economic logic. The companies that thrive in this cycle will not be those who avoid cloud, but those who architect hybrid intelligently public cloud for burst and elasticity, owned GPU infrastructure for sustained inference and sovereign workloads.

For CXOs, the message is clear 2026 is not simply an upgrade year, it is a capacity planning year. AI ambitions without hardware readiness will create performance bottlenecks and cost fatigue. Leaders aiming for large-scale generative deployments must prepare not only budgets but power availability, cooling strategy, networking fabric, and data center modernization. Those who anticipate the curve will accelerate innovation; those who underprepare may find AI strategy constrained not by model capability, but by infrastructure reality.

# In 2026, Marketers Must Drive P&L – Not Just Campaigns – to Stay Relevant

The marketing department is entering a survival phase. In 2026, brand teams will not be judged by clever campaigns, vanity metrics, or "awareness," but by their direct contribution to revenue, profitability and business continuity. The shift is structural, not seasonal. Over the last 24 months, multiple industry studies have highlighted a major trend: CEOs and boards are demanding tighter financial accountability from marketing leaders. A recent global CMO council study reported that 74% of CEOs believe marketing investments must be tied to concrete bottom-line outcomes, not soft KPIs. Another benchmark survey indicated that 61% of companies are now linking at least part of marketing compensation to revenue impact.

The economic climate is driving this change. Persistent inflation, long B2B sales cycles, and tighter capital markets mean enterprises are cutting spend on non-essential initiatives. Finance chiefs are scrutinizing every rupee or dollar spent on paid media, brand partnerships, and agency retainers. Inside the boardroom, the question has moved from "What are we doing to get attention?" to "What are we doing to get results?"

2026 will cement three non-negotiable requirements for marketers: First, pipeline accountability. Marketing will be asked to generate qualified sales opportunities, not leads for marketing automation to nurture indefinitely. B2B organizations are already reporting that marketing-sourced pipeline is the most critical metric in board reviews. Salesforce data shows that high-performing companies attribute at least 55% of closed revenue to marketing-influenced pipeline.

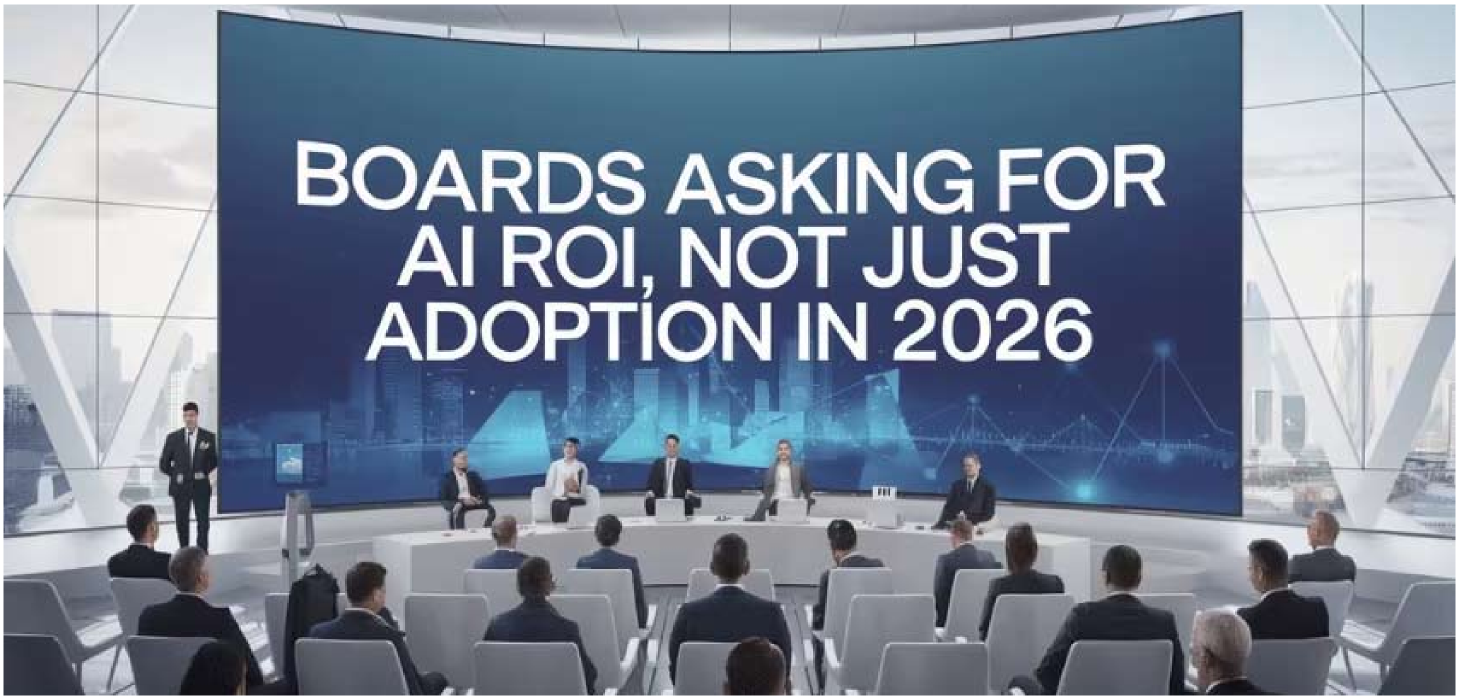
Second, unit economics clarity. CMOs need to speak the language of CFOs: customer acquisition cost, lifetime value, contribution margin, and gross profit. Demand creation without unit economics will be treated as waste. Bain's 2025 forecast suggests that organizations aligning marketing decisions with CAC-to-LTV ratios will outperform peers by up to 3X in shareholder value over the next three years.

Third, content that accelerates conversions. 2025 research indicated marketers who reengineered content operations, adopting structured content frameworks, personalization engines, and intent-signal tracking, saw 13% strong gains and 48% moderate gains in performance in just one year. That momentum is expected to continue into 2026.

The new marketing reality is brutally simple: if marketing cannot show how it contributes to EBITDA, it will get replaced by something that can. AI-led data engines, revenue operations, sales-led social, and partner acceleration networks are all stepping into the space traditionally reserved for brand and digital teams.

Forward-leaning marketers are already adapting. They are embedding with sales teams, joining revenue review calls, co-owning dashboards, and taking responsibility for moving deals forward. They are prioritizing customer data over creative instincts and measuring outcomes, not outputs. The marketers who survive 2026 will not be "brand custodians." They will be profit architects — expected to influence pricing, retention, renewals, cross-sell, channel strategy, and customer lifetime value.

The message to every CMO is clear: relevance in the marketing function is no longer achieved through campaigns. It is achieved by owning a piece of the financial story — and proving it every quarter.




Boards of directors across global enterprises are tightening the screws on artificial intelligence spending as they enter 2026, shifting the conversation from adoption and experimentation to hard returns. After two years of aggressive hiring, tooling and "GenAI lab" culture, directors are now asking a blunt question: What are we getting back for all this AI money? Fresh board survey data shows that oversight has moved beyond high-level digital transformation narratives. A 2025 board study from BDO notes that directors are now explicitly focused on "garnering ROI" from major change programmes, including AI, and are scrutinizing how leadership turns technology investments into measurable value rather than slideware.

At the same time, the investment curve is still steep. Deloitte's 2025 global AI survey found that 85% of organizations increased their AI spending in the past 12 months, and 91% plan to increase it again, even as many admit returns are slower than expected. Most respondents reported that a typical AI use case takes two to four years to show satisfactory ROI, far longer than the 7–12 month payback usually expected for technology investments. Only 6% of organizations reported payback in under a year. That tension rising spend, lagging payback is now front and center in boardrooms.

A recent report from Boston Consulting Group on more than 1,250 companies concluded that only around 5% are meaningfully benefiting from their AI investments with clear revenue growth, cost reduction or better cash flow, while roughly 60% see little to no value despite heavy spending. Yet, in parallel, usage and productivity signals inside enterprises are very real. A 2025 enterprise AI report shows that usage of tools like ChatGPT has surged: message volume grew roughly 8x, and API reasoning token consumption per organization increased over 300x year-on-year, as companies embed AI deeper into workflows. Employees using AI assistants report 40–60 minutes of time saved per day, with a majority saying AI improves the speed or quality of their work.

McKinsey's 2025 State of AI survey echoes that trend, noting that 80% of companies set efficiency as a core objective for AI initiatives, and about half of AI "high performers" are redesigning workflows around AI rather than simply layering tools on top of old processes.

This mix of high usage, visible productivity gains and unclear financial payback is reshaping the tone at the top. As one board member at a European industrial group put it privately: "We're done funding science projects. If AI is strategic, show us the P&L." Analysts expect that 2026 will be the year many organizations either professionalize their AI portfolios or quietly shut down hype-driven experiments. Gartner has already warned that more than 40% of agentic AI projects could be scrapped by 2027 due to high cost and unclear business outcomes, even as the same technologies are forecast to handle a growing share of daily business decisions. Forrester's technology predictions point in the same direction, arguing that tech and security leaders must move "past experimentation" and deliver measurable, secure business outcomes as budget volatility increases and the margin for error shrinks. The money involved helps explain the urgency. A recent analysis of enterprise generative AI adoption estimates that companies spent about $37 billion on GenAI in 2025, up from roughly $11.5 billion in 2024 a 3.2x year-on-year increase with a growing share of that spend tied to application-layer software that sits directly in front of customers and employees. With that kind of escalation, directors are increasingly asking management to prove that AI is doing more than generating drafts and demos.

Behind the scenes, board-level conversations are evolving from, "Do we have a GenAI strategy?" to questions like:

- How much cycle time has AI actually removed from critical workflows?
- What cost savings or efficiency gains are traceable to AI, net of new spend?
- Where has AI directly contributed to incremental revenue or margin uplift?
- Are we measuring AI's impact on customer experience, NPS or churn in a credible way?

Consultants advising boards say the organizations that are getting it right tend to share a few traits: they treat AI as part of end-to-end workflow redesign, not a tool bolted onto legacy processes; they pair IT with the business to co-own outcomes; and they define clear metrics—cycle time reduction, error-rate improvement, revenue per customer, agent handle time—up front, not after deployment. In this environment, CXOs can no longer rely on "adoption" as a success metric.

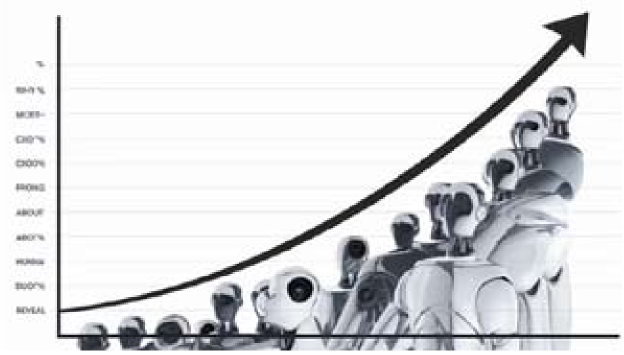
A CIO at a large Asian bank summed it up bluntly: "The board doesn't care how many employees use AI they care what it did to our cost-to-income ratio."

The emerging consensus is that 2026 is the year of AI value realization, not AI experimentation. Boards are still willing to fund AI, but they are attaching conditions: clear business cases, tighter governance, responsible AI controls and evidence that models are embedded where they actually move the needle—customer journeys, risk decisions, supply chain, pricing, service and operations. For CXOs, the message is simple but unforgiving:

- No more AI for AI's sake.
- Tie every major initiative to a business KPI.
- Instrument workflows so that impact is visible, auditable and repeatable.

The hype cycle may be fading, but that doesn't mean AI is slowing down. Instead, it's being pulled into the discipline of corporate finance. In 2026, the organizations that thrive will be those that can walk into the boardroom not with another AI vision deck but with a credible answer to a very old question: "What did we get for what we spent?"

# Why Most CXOs Are Wrong About AI – And What the Numbers Reveal



Across boardrooms globally, AI is being positioned as the next inevitable growth lever. Adoption numbers seem to validate the optimism: nearly 78% of organizations now use AI in at least one business function, up sharply from previous years. Yet beneath this surface-level momentum, the results tell a far more uncomfortable story for CXOs.

Despite widespread adoption, 70–85% of AI initiatives fail to deliver their expected outcomes, and recent studies indicate that as many as 95% of generative AI projects are not producing meaningful business impact. The gap is not technological. It is strategic. Most CXOs continue to treat AI as a technology upgrade rather than a fundamental shift in how decisions, processes, and accountability operate across the enterprise.

One of the biggest misjudgements lies in scale. While AI pilots often show promise, nearly 80% never move beyond proof-of-concept. When these pilots are pushed toward enterprise deployment, they collide with fragmented data, unclear ownership, weak governance, and legacy workflows. AI does not fix organizational complexity it exposes it. Leadership alignment is another critical blind spot. Fewer than one in three AI programmes have direct CEO-level sponsorship, resulting in initiatives that lack authority, prioritization, and business clarity. Without senior leadership actively reshaping operating models around AI, investments remain tactical experiments rather than strategic advantages.

ROI expectations further distort outcomes. Many CXOs anticipate immediate, linear returns similar to traditional IT projects. In reality, early AI value is uneven and often invisible on conventional dashboards. While well-executed AI programmes can generate up to $3.7 in value for every dollar invested, only a small minority of organizations achieve this because most fail to redesign metrics, workflows, and decision rights alongside the technology.

Data readiness remains the most underestimated risk. Industry forecasts suggest that 60% of enterprise AI projects will fail due to poor data quality, integration gaps, and governance issues, not because of weak models. AI systems amplify data flaws at scale, turning unresolved data debt into operational risk. Finally, CXOs often overestimate control. As AI systems become more autonomous, over 40% of agentic AI initiatives are expected to be scrapped by 2027 due to escalating costs, regulatory exposure, and unclear business value. Treating AI like deterministic software creates governance gaps that boards and regulators are increasingly unwilling to accept. The uncomfortable truth is clear: AI success has far less to do with algorithms and far more to do with leadership maturity. Organizations that win with AI are not those spending the most, but those willing to redesign decision-making, accountability, and trust from the ground up.

# Channel Point

## Why B2B Social Media ROI Is Under Scrutiny in 2025

Marketing leaders are entering 2026 with a clear reality check B2B social media ROI is under intense scrutiny. Despite constant activity across LinkedIn, X, and YouTube, social media's contribution to real business growth has sharply declined. In an environment where marketing budgets remain flat at 7.7% of company revenue, CMOs are being asked to justify every dollar in terms of pipeline, not presence. The CFO era of marketing has officially begun.

Across B2B industries, social media's share of traffic has fallen from roughly 3% in 2019 to just about 1% in 2024, according to Forrester. Organic search long the cornerstone of inbound growth also dipped from 39% to 27%, with AI-powered search and chat assistants reshaping discovery patterns. Meanwhile, traffic from partner, referral, and owned ecosystem sources jumped from 58% to 72%. The signal is clear: owned and ecosystem-based channels are outperforming rented social reach. Boards and CFOs are now asking a single defining question — "Does your social media strategy build pipeline or just visibility?"

The problem lies in what vanity metrics hide. Likes, comments, and shares don't equal revenue. Algorithm changes make social reach unpredictable and short-lived. Paid reach keeps getting more expensive, with global social ad spend expected to hit $276.7 billion in 2025. And new brand risks like deepfakes and impersonation make social presence increasingly volatile. If your customer acquisition cost (CAC) is rising while engagement rises too, you're measuring noise, not growth. Many B2B brands stumbled by copying consumer playbooks chasing mass awareness while neglecting the complexity of enterprise buying. In B2B, decision cycles are longer and layered with multiple stakeholders, requiring tailored content journeys. Social media contributes barely 1–3% of traffic, compared with 40–50% from search, email, and direct channels. As AI search redefines visibility, marketers must re-optimize for owned and intelligent discovery channels or risk digital invisibility.

A standout example comes from Lenovo's "Smarter Leads the Future" program, which engaged over 900 CIOs across APAC using a research-led content-marketing approach. Through a mix of thought-leadership storytelling, the CIO Chat Show series, and personalized nurture tracks, Lenovo achieved a 35% increase in email engagement and a 20% uplift in qualified pipeline conversations — proving that credibility and context beat clicks.

Meanwhile, email marketing continues to deliver unmatched ROI for B2B marketers. With an average return of $36 for every $1 spent, open rates around 21%, and CTRs near 2.6%, email provides owned, algorithm-proof access to audiences. Most teams still spend 80% of their time managing social media brands while giving little mindshare to email strategy when the ROI differential is obvious. Beyond direct channels, partner ecosystems are driving the next wave of ROI. Forrester's 2024 benchmarks highlight that partner enablement and engagement deliver some of the highest B2B marketing returns. Microsoft's Cloud Speed Circuit campaign, built around dashboards, incentives, and co-sell frameworks, reduced CAC by double digits and accelerated pipeline velocity by 18%. The takeaway is simple ecosystem-led orchestration consistently outperforms social-first tactics.

The path forward for CMOs is strategy-first growth. Anchor your brand in a strong narrative, build first-party data assets, orchestrate partner ecosystems, and secure AI-first visibility through optimized LLM-ready content. Measure what matters — pipeline velocity, customer lifetime value, acquisition cost, and brand preference. McKinsey data shows that firms linking marketing strategy directly to growth levers deliver 3–5% higher shareholder returns.

In 2025, B2B marketing success will depend less on being loud and more on being accountable. Social channels will remain useful for awareness, but owned data, ecosystems, and email will drive sustained growth. The brands that adapt now — balancing creativity with commercial clarity — will own the decade ahead.

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