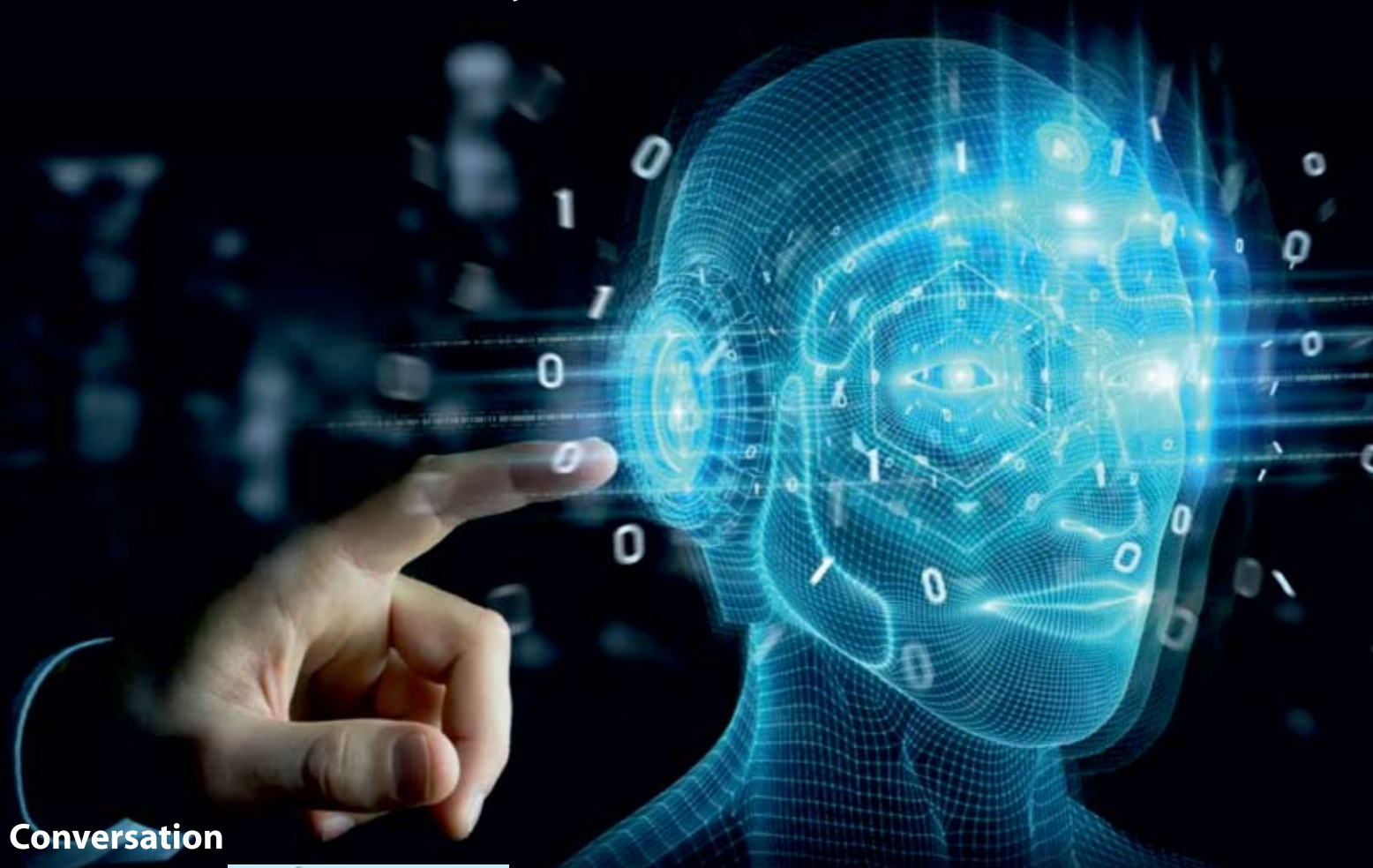


IT Partners are **Weaponising AI Agents** as Their GTM Play for the SME Market in 2026



In Conversation

Backup Readiness Is the New Cyber Resilience Metric Why CISOs Must Shift from Backup Availability to Recovery Confidence



Suprakash Guha
Lumina Datamatics

Saurabh Barjatiya
CyberVigilens

Power List
Top 10
Women
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How Indian
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Global Markets
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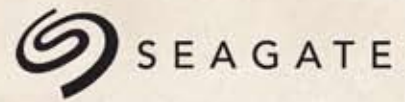
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SUPRAKASH GUHA,
CISO & AVP – Customer Quality,
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SAURABH BARJATIYA,
CTO & Co-Founder,
CyberVigilens

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BREAKING INTELLIGENCE REPORT

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CIO Intel Intelligence: AI • Cloud • Cybersecurity Landscape of Indian Banking 2026
CIO Intelligence Desk, March 18, 2026 | **WFI EXCLUSIVE**

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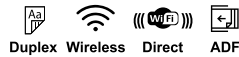
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IT Partners Are Weaponising AI Agents as Their GTM Play for the SME Market in 2026

Something significant is happening in India's IT channel ecosystem in 2026 — and it is moving faster than most enterprise buyers have noticed. Managed Service Providers and System Integrators, long positioned as reliable infrastructure managers and deployment specialists, are executing a fundamental reinvention of their go-to-market strategy. The instrument of that

reinvention is the AI agent, and the target market is India's 63-million-strong SME community — the most underserved, highest-potential, and most rapidly digitising segment of the economy.

The timing is not accidental. The global managed services market reached \$424.14 billion in 2026, growing at a 12.8% CAGR toward a projected \$1.27 trillion by 2035,

according to Research Nester. But the more telling figure is this: \$90 billion in new SMB IT spending is projected to flow into managed IT services through 2026, with 72% of SMBs globally planning to increase managed IT investment, according to Deskday's MSP Trend Analysis. India, with its aggressive digitisation push and government-backed frameworks like DPIIT's Digital India, is positioned to

capture a disproportionate share of that growth. For MSPs and SIs operating in the Indian mid-market, this is not a modest opportunity. It is a structural inflection.

The challenge, historically, has been economics. Serving the SME segment profitably has always been the channel's unsolved equation. SMEs demand enterprise-grade capability — cybersecurity, cloud management, compliance monitoring, data

analytics — but cannot pay enterprise-grade contract values. The average managed services contract for an SMB with 50 users runs \$9,250 per month, according to ConnectWise's IT Nation Benchmark. For many

period — directly attributable to AI-enabled operational efficiency, per ConnectWise and Service Leadership data. The maths is changing: an MSP deploying AI agents for Tier-1 support can now serve three times as many

monitoring that no in-house IT team of two could match. Third, they are leading with AI as the GTM conversation starter — not selling “managed services” but selling “AI-powered IT transformation for your

as an AI-led GTM entry point for the SME market. Security-inclusive managed service packages command a 42% pricing premium over packages without security — the single largest pricing differentiator in the MSP market, according to ConnectWise. And 56% of MSPs are now using AI to detect and predict cyberthreats, according to Integris research. For SMEs facing increasingly sophisticated ransomware attacks and DPDP Act compliance obligations in India, an MSP that leads with “AI-powered security operations centre for your business, starting at ₹X per month” is entering a commercial conversation that a five-person SME IT team



Indian MSPs operating with thin margins and limited engineering capacity, that price point has been difficult to sustain profitably against the service intensity SMEs require.

AI agents are dismantling that constraint. Automation now handles 38% of MSP service delivery tasks in 2026 — up from 22% in 2023 — covering ticket routing, patch deployment, alerting, and first-level remediation, according to Datto's benchmark data. Average MSP gross margins hit 52% in 2025, up from 48% in 2022, and EBITDA margins improved to 18.4% from 14.7% in the same

SME accounts with the same engineering headcount.

The specific GTM play being executed by leading MSPs and SIs in 2026 follows a consistent pattern. First, they are embedding AI agents directly into their service stack — deploying tools like Thread's Magic Agents, ServiceNow Virtual Agent, and Zendesk AI for automated ticket triage, onboarding workflows, and Level-1 resolution. Second, they are repackaging this AI-augmented capability as a differentiated SME proposition: enterprise-grade IT operations at SME-affordable price points, with 24/7 autonomous

business,” which lands differently with an SME CFO being outpaced by competitors who are already using AI tools.

The cybersecurity vector is particularly powerful

AI AGENT USE CASES DEPLOYED BY MSPs — IMPACT ON SME SERVICE DELIVERY (2026)		
AI AGENT APPLICATION	EFFICIENCY GAIN	SME BUSINESS IMPACT
Automated Ticket Triage & Resolution (Tier 1)	30%	Reduction in operational issues & downtime via AIOps (Integris / Research)
AI-Enabled Cybersecurity (Threat Detection)	56%	of MSPs now using AI for threat detection & prediction (Integris 2026)
Proactive Monitoring & Patch Management	88%	of security teams report significant time savings through AI (2025 study)
IT Cost Reduction for SME Clients	20-30%	Overall IT cost reduction via managed services (Research & Markets)
Productivity Uplift for SME Businesses	15-25%	Efficiency gain from improved uptime & reduced downtime (Research & Markets)



cannot win without external help.

System Integrators are executing a complementary but distinct play. Where MSPs are embedding AI agents into recurring service delivery, SIs are deploying AI as an accelerant in project-based digital transformation engagements — compressing 18-month ERP implementations into 10-month AI-assisted deployments, using intelligent automation to handle data migration, testing, and change management workflows that previously required large billable teams. The economics favour both parties: the SI delivers faster, the SME pays less, and the AI agent captures the efficiency delta as margin.

The AI agents market underpinning all of this is exploding at a pace that validates the channel's urgency. The global AI agents market is projected to grow from \$5.4 billion in 2024 to \$7.6 billion in 2025, and reach \$47.1 billion by 2030 at a 45.8% CAGR, according to data cited by Warmly's 2026 AI Agents Statistics report. For MSPs and SIs who embed

this capability into their service DNA now — before the market consolidates around a handful of AI-native competitors — the first-mover advantage in the SME segment is substantial.

For India's IT channel ecosystem — which includes some of the world's most

competitive MSPs, born-in-India SIs, and a maturing cloud reseller community — the 2026 GTM opportunity is clear. The SME segment is not a charity case or a volume play. It is the highest-growth, highest-urgency, newly-profitable segment in the entire IT services landscape

— and AI agents are the technology that finally makes it commercially viable to serve it well. The partners who move fastest, build the deepest AI agent capability, and package it most simply for the SME buyer will define the channel landscape for the rest of the decade.

CXO TV Analysis: Why the SME Segment Is the AI Channel's Decisive Battleground

- **Scale:** India alone has 63 million SMEs — the world's second-largest SME ecosystem — with only a fraction currently receiving professional IT managed services. The Alenabled economics of MSP delivery make this segment newly serviceable at scale.
- **Urgency:** 60% of SMBs struggle to manage IT infrastructure effectively in-house, per Market Growth Reports. AI agents convert that gap into a clear commercial proposition: "outsource the complexity, keep the control."
- **Defensibility:** MSPs using AI deliver 24/7 autonomous monitoring that no in-house team can match. The switching cost for an SME, once embedded in an AI-powered MSP service stack, is significant — creating durable recurring revenue.
- **Margin expansion:** MSP EBITDA margins improved from 14.7% (2022) to 18.4% (2025) as AI automation absorbed Tier-1 service burden. This trend accelerates in 2026 as agentic AI handles increasingly complex workflows.
- **Market timing:** \$90 billion in new SMB managed IT spending through 2026 is available. MSPs and SIs that lead with AI agent capability will capture disproportionate share of this wave.



SUPRAKASH GUHA,
CISO & AVP – Customer Quality,
Lumina Datamatics



SAURABH BARJATIYA,
CTO & Co-Founder,
CyberVigilens

Backup Readiness Is the New Cyber Resilience Metric Why CISOs Must Shift from Backup Availability to Recovery Confidence

In conversation with Suprakash Guha, CISO & AVP – Customer Quality, Lumina Datamatics & Saurabh Barjatiya, CTO & Co-Founder, CyberVigilens

Hosted by Kalpana Singhal, Co-Founder & Editor, CXO TV from Techplus Media Group

Most enterprises believe backups equal resilience. In reality, recovery readiness determines whether organisations survive ransomware attacks. In this CXO Spotlight conversation, security leaders explain why restore testing, immutable backup strategies, SIEM adoption, and board-level cyber risk positioning are now critical priorities for 2026.

■ Many organisations believe they are secure because backups exist. Yet ransomware incidents continue exposing recovery failures. Where does the real gap lie?

Suprakash Guha: Most enterprises are taking backups regularly—daily, weekly, monthly—and dashboards often show everything in green. That creates a false sense of assurance. The real issue is that organisations rarely validate whether those backups are actually recoverable during a disruption.

In several cases, only file-level backups exist, while application dependencies are missing. During an incident, files may restore successfully, but business operations still cannot restart because applications are unavailable. Recovery testing—not backup creation—is the missing discipline today.

■ From an external cyber-resilience assessment perspective, how often does backup confidence differ from actual recovery readiness?

Saurabh Barjatiya: Quite

frequently. Backup is the last line of defence during ransomware incidents, but organisations often misunderstand what they are actually protecting.

Many enterprises back up only “critical data” while assuming the rest is non-essential. However, when faced with potential deletion of so-called non-

critical information, they realise those datasets are operationally significant.

Another overlooked gap is catalog backup or configuration backup. Even if tape or cloud backups exist, recovery becomes impossible if the backup server itself cannot be rebuilt. These architectural dependencies are rarely validated in advance.

■ What assumptions typically fail during real recovery

exercises?

Suprakash Guha: Organisations often assume that restoring files alone restores operations. In reality, businesses rely on applications, databases, training systems, and workflow dependencies working together.

Recovery testing must therefore simulate complete

“Ideally, every workload should be restored at least once annually. A practical approach is restoring 25% of workloads every quarter from multiple recovery sources—disk, tape, and cloud.”

operational readiness—not just storage restoration. Quarterly restoration testing and validation after policy changes can significantly improve resilience maturity.

■ How frequently should enterprises realistically validate restore readiness?

Saurabh Barjatiya: Ideally, every workload should be restored at least once annually. A practical approach is restoring 25% of workloads every quarter from multiple recovery sources—

disk, tape, and cloud.

Equally important is restoring workloads into alternate environments rather than the same production infrastructure. Practising recovery under realistic conditions improves response confidence during an actual crisis.

■ Attackers increasingly target backup layers themselves. How critical has immutability become in enterprise backup strategies?

Suprakash Guha: Immutability is now essential. Attackers deliberately compromise backup repositories before launching ransomware payloads because recovery capability determines whether organisations pay ransom or recover independently.

However, implementing immutable backups requires balancing access control, governance, and restoration flexibility. Security leaders must ensure immutability strengthens protection without slowing recovery response during emergencies.

■ Where do organisations typically struggle while implementing immutable backup

architectures?

Saurabh Barjatiya: The first challenge is infrastructure readiness—both hardware and software must support immutability. The second is governance alignment because immutable backups cannot be deleted even if retention policies are incorrectly configured.

Interestingly, cloud-based immutability offers a practical option for mid-size organisations. It delivers both off-site protection and ransomware-resistant storage without requiring specialised infrastructure investments.

■ **Backup resilience is increasingly becoming a boardroom topic. How should CISOs position it in leadership conversations?**

Suprakash Guha: Backup readiness must be presented as a strategic risk decision rather than an IT control. Leadership teams respond best when recovery capability is expressed in business impact terms.

For example, demonstrating that failing to invest today could result in 10x higher financial loss tomorrow makes resilience investment decisions easier for boards to prioritise. Recovery strategy must be integrated into business continuity planning frameworks.

■ **Are organisations effectively integrating backup maturity into ISO 27001 and business continuity frameworks today?**

Saurabh Barjatiya: Yes, increasingly so. Backup validation now appears as a dedicated audit component across ISO 27001, vendor assurance programs, and enterprise compliance reviews.

Confidence in backup readiness directly affects brand trust, service continuity, and vendor credibility. As certification maturity increases, we are seeing stronger alignment between backup governance and enterprise resilience programs.

commonly repeat in ransomware readiness planning?

Suprakash Guha: Failure to clearly define Recovery Time Objective (RTO) and Recovery Point Objective (RPO) before an incident occurs.

■ **What metric should boards track to measure backup resilience effectively?**

Saurabh Barjatiya: Restoration confidence—how frequently systems have been successfully restored in

strategies in 2026?

Suprakash Guha: SIEM deployment, DLP implementation, and enterprise-grade DR architectures supported by air-gapped backup strategies across multi-location environments.

■ **What separates organisations that recover quickly after ransomware incidents from those that struggle?**

Saurabh Barjatiya: Recovery success depends on a combination of visibility, segmentation, endpoint protection, monitoring capability, and tested backups.

In one case, an enterprise detected suspicious traffic within 15 minutes of compromise and prevented lateral movement before damage occurred. That level of readiness comes only from layered security architecture supported by recovery discipline.

Across industries, backup readiness is moving from a compliance checkbox to a strategic resilience indicator. As ransomware dwell times increase and attackers increasingly target recovery infrastructure first, enterprises that continuously validate restoration capability—not just backup availability—will define the next benchmark of cyber maturity.

For channel partners, MSPs, and security solution providers, recovery assurance is rapidly emerging as one of the most critical advisory opportunities in enterprise infrastructure strategy.

“The first challenge is infrastructure readiness—both hardware and software must support immutability. The second is governance alignment because immutable backups cannot be deleted even if retention policies are incorrectly configured.”

■ **What is one backup myth enterprises still believe?**

Saurabh Barjatiya: That disk backup alone is sufficient.

■ **What is one control every organisation should implement immediately?**

Suprakash Guha: A structured backup recovery testing strategy.

What mistake do CISOs

controlled exercises.

■ **What is one action organisations should take in the next 90 days to strengthen recovery readiness?**

Suprakash Guha: Plan and execute full backup recovery testing to ensure business operations can continue without live production systems.

Looking ahead, what security priorities will shape enterprise cyber

Power List

Top 10 Women CIOs 2026 in India



Enterprise technology is now the operating system of modern business—banking, manufacturing, telecom, fintech, FMCG, healthcare, and aerospace all run on

digital trust. The Power List 10 Women CIOs 2026 recognises leaders currently steering mission-critical platforms, cybersecurity, data strategy, and transformation at scale. These executives

don't just "run IT"; they shape growth, resilience, and customer experience through cloud, AI, automation, and disciplined governance. From national infrastructure to last-mile inclusion and precision

diagnostics, their work turns complexity into competitive advantage—while raising the benchmark for inclusive, outcomes-driven leadership across India's digital economy in 2026 and beyond.

Karishhma Kumar, CIO of Škoda Auto Volkswagen India

Karishhma Kumar, CIO of Škoda Auto Volkswagen India, is a transformative technology leader driving digital strategy, enterprise IT modernization, and data-driven innovation across one of India's fastest-growing automotive brands. Her leadership blends engineering precision with digital agility, enabling scalable platforms, connected mobility solutions, and seamless

customer experiences in the evolving auto tech landscape.



Kopal Sarin Raj, CIO, Wabtec (India)

Kopal Sarin Raj, VP-IT & CIO at Wabtec India, drives technology strategy across manufacturing and engineering operations. She focuses on secure digitization, ERP/CRM modernization, and GCC-led delivery to improve uptime, productivity, and decision intelligence. Her work strengthens cyber posture and

standardizes processes that scale across plants globally, reliably.



**Varundeep Kaur, CIO,
Spice Money**



Varundeep Kaur, CIO at Spice Money, accelerates fintech-led financial inclusion by modernizing platforms used by last-mile agents in rural India. She has pushed automation, resilient architectures, and security upgrades to reduce errors and turnaround time. Her industry contribution: safer, faster, more accessible digital financial services nationwide, every day.

**Priya Dar,
CIO, Valvoline Cummins
Pvt Ltd (India)**

Priya Dar, Head of IT at Valvoline Cummins India, leads enterprise technology



supporting supply chain, manufacturing, and customer-facing operations. She brings disciplined IT governance, portfolio delivery, and data-led decisioning to improve service levels and speed. Her contribution is translating industrial requirements into scalable, secure digital execution, consistently, reliably.

**Rucha Nanavati
CIO / Chief Digital
Transformation Officer,
Mahindra (Auto)**



Rucha Nanavati, CIO and Chief Digital Transformation Officer at Mahindra's Auto division, drives enterprise digitization linking product, plant, and customer journeys. She advances data platforms, automation, and digital engineering culture to shorten cycles and improve quality. Her industry impact shows manufacturing can move at software speed, sustainably, at scale.

**Pooja Chatrath,
CIO, Oncquest
Laboratories**

Pooja Chatrath, CIO at Oncquest Laboratories, strengthens diagnostics



infrastructure. She focuses on scalable platforms, process automation, and data-driven operations to improve delivery reliability and efficiency. Her industry contribution is modernizing tower operations—supporting India's connectivity at national scale today, securely.

**Shobhana Lele
CIO, The Bombay
Dyeing & Manufacturing
Company**

Shobhana Lele leads enterprise IT and digital transformation at Bombay Dyeing, modernising legacy manufacturing through ERP,



through digital transformation, AI-enabled operations, and secure data flows. She builds platforms that improve lab efficiency, logistics visibility, and patient experience while tightening cybersecurity. Her contribution enables diagnostics teams to act faster on insights, reduce turnaround time, and support clinical outcomes.

**Neeti Wahi
Chief Digital &
Information Technology
Officer, Indus Towers**

Neeti Wahi, Chief Digital & Information Technology Officer at Indus Towers, leads digital transformation for critical telecom



SAP-led process optimisation, and data-driven decision systems. Her work enables operational agility, supply-chain efficiency, and digital governance, demonstrating how traditional Indian enterprises can successfully transition into technology-enabled, competitive organisations.

**Annie Mathew
CIO, Mother Dairy Fruit
& Vegetable Pvt. Ltd.**

Annie Mathew drives IT strategy at Mother Dairy, strengthening digital



platforms across procurement, production, distribution, and retail operations. Her leadership focuses on scalable ERP systems, analytics, and automation that improve traceability, efficiency, and quality in India's food supply chain, supporting millions of farmers and consumers nationwide.

Mitali Biswas

CIO, CK Birla Hospitals.

Mitali Biswas, CIO at CK Birla



Hospitals, advances healthcare digitalization through cloud adoption, EMR expansion, data lakes, and cyber investments. She modernizes hospital systems to improve patient experience and operational efficiency. Her contribution moves hospital IT from reactive support to proactive, data-driven clinical enablement across facilities and departments, measurably.

Oracle layoffs raise concerns across India's tech workforce



Reports suggest that Oracle Corporation may cut up to 30,000 roles globally, with as many as 12,000 positions potentially impacted in India, making the country one of the most affected regions in the restructuring wave. While exact numbers vary across reports and are not fully confirmed by the company, the scale of impact has triggered strong reactions across India's enterprise-technology workforce. The layoffs appear linked to Oracle's strategic shift toward AI infrastructure, cloud platforms, and large-scale data-centre expansion, areas now attracting a larger share of global technology investment. As enterprise vendors realign spending priorities, traditional support, services, and maintenance-heavy roles — many based in India — are increasingly being rationalised.

Why India is seeing deeper impact India has long served as a major engineering and delivery hub for global enterprise software companies. However, automation, platform engineering, and AI-led operations are reducing reliance on large distributed support teams. This shift is pushing companies to restructure workforce models faster than before. Industry observers note that the transition is not unique to Oracle. Similar restructuring patterns are visible across multiple global technology firms redirecting

budgets from services delivery to AI capability building and hyperscale infrastructure. Are Indian employees losing trust in American tech firms?

Rather than a collapse of trust, what is emerging is a shift in expectations. Indian professionals increasingly recognise that job stability in global product companies now depends more on alignment with AI-driven transformation priorities than tenure or geography. At the same time, concerns around sudden communication styles during layoffs have intensified debate about transparency and workforce security in multinational tech organisations. Still, U.S. technology firms continue to offer some of the strongest compensation, learning exposure, and innovation opportunities available in India's product ecosystem.

What this signals for the enterprise technology market For CIOs, OEMs, and solution providers, the layoffs highlight a broader structural transition underway across enterprise IT. Spending is moving away from legacy support structures toward AI platforms, cloud architecture, automation tools, and data infrastructure. The message for vendors is clear: enterprise buyers are accelerating investments in future-ready infrastructure, and workforce strategies across global tech companies are evolving accordingly

Persistent Appoints Hari S. Abhyankar as Executive Vice President and Global Head of Private Equity and Professional Services

Strengthens Persistent’s focus on AI-led transformation for private equity firms and their portfolio companies

Persistent Systems, a global leader in Digital Engineering and Enterprise Modernization, today announced the appointment of Hari S. Abhyankar as Executive Vice President and Global Head of Private Equity and Professional Services.

As private equity firms compress value-creation cycles and place greater emphasis on AI-led transformation, the need for execution partners who can deliver results at speed is increasing. Persistent is scaling its focus in this segment, bringing together its engineering-led capabilities, AI expertise and platform-driven approach to support investors and their portfolio companies from diligence through value realization.

In this role, Hari will lead Persistent’s global strategy and growth across private equity investors, their portfolio companies and professional services organizations. He will work closely with clients to accelerate revenue growth, enable platform modernization and drive faster realization of transformation priorities across portfolios, while also expanding EBITDA through improved operational efficiency and value creation.

Hari brings over 25

years of experience at the intersection of strategy, technology and business transformation. He previously served as a Partner at McKinsey & Company, advising leading technology companies and global enterprises on corporate strategy, large-scale transformation and revenue acceleration initiatives. Following his tenure at McKinsey, he worked with AI-native startups, focusing on scaling technology-led innovation and next-generation operating models. He has also held senior leadership roles at Interpublic Group and



HARI S. ABHYANKAR,
Executive Vice President and
Global Head of Private Equity
and Professional Services,
Persistent



SANDEEP KALRA,
Chief Executive Officer and
Executive Director, Persistent

Digitas, where he built and led analytics, digital strategy and data-driven marketing organizations serving global technology and enterprise clients. Hari holds a PhD in Operations Management from the MIT Sloan School of Management.

**Sandeep Kalra, Chief
Executive Officer and
Executive Director,
Persistent**

“Private equity is a strategic growth engine for Persistent. As investors push for faster value creation across their portfolios, the ability to move from strategy to execution at speed becomes critical.

This is where Persistent stands apart. We combine engineering depth, AI-led platforms and execution discipline to deliver results that matter, from accelerating growth to improving operating margins and enabling exit readiness. Hari’s experience strengthens our ability to deepen our engagement with private equity firms and drive sustained performance across their portfolios.”

Hari S. Abhyankar,
Executive Vice
President and Global
Head of Private Equity
and Professional
Services, Persistent

“Private equity firms are operating in an environment where value creation needs to be faster, more predictable and more technology-driven than ever before. This requires a fundamentally different approach, one that integrates strategy with execution and scales results across the portfolio. Persistent’s engineering-led DNA and focus on AI-driven transformation position it strongly to address this need. I look forward to working with our clients and partners to accelerate portfolio performance and



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How Indian MSPs Are Winning Global Markets in 2026



Indian Managed Service Providers (MSPs) are emerging as the dark horses of global enterprise transformation, rapidly expanding across ANZ, EMEA, and North America by combining cost efficiency, niche engineering expertise, and deep hyperscaler alignment. While Tier-1 IT giants continue to dominate large-scale deals, a new wave of agile, specialized MSPs is quietly capturing high-growth opportunities in cloud, AI, and cybersecurity modernization.

Companies such as Rapyder (AWS Premier Partner), Searce (Google Cloud Premier Partner), Quantiphi, Minfy, OpsTree Solutions, Compusoft, ACPL, To The New, and CloudThat are increasingly building global footprints by leveraging their strengths in cloud modernization, AI/ML deployment, DevOps automation, and managed security services. These MSPs are deeply embedded within the AWS, Microsoft

Azure, and Google Cloud ecosystems, enabling them to tap into co-sell opportunities, MDF programs, and global partner networks to accelerate international expansion.

What sets these Tier-2 players apart is their ability to deliver high-impact outcomes at significantly lower costs often 30–60% more efficient than local providers in Western markets while maintaining strong engineering quality. As enterprises in developed regions face rising talent costs and skill shortages in cloud, AI, and cybersecurity domains, Indian MSPs are stepping in as execution-focused transformation partners, offering faster deployment cycles and specialized capabilities without the overhead of large consulting models.

The global opportunity is substantial. Enterprises are under pressure to modernize legacy systems, optimize cloud spend, and integrate AI into business operations,

creating sustained demand for partners who can deliver end-to-end transformation. Tier-2 MSPs are capitalizing on this by focusing on niche capabilities rather than scale, positioning themselves as experts in areas such as FinOps, Kubernetes, AI-driven analytics, and cloud-native application development.

Another key driver of their success is the evolution of go-to-market strategies. These MSPs are no longer operating purely as backend delivery units; they are increasingly engaging directly with CIOs and IT decision-makers through targeted outreach, CXO roundtables, and account-based marketing programs. This shift from vendor to frontline GTM partner is enabling them to build trust and influence buying decisions in competitive international markets.

However, success in global markets requires more than technical capability. Trust, compliance, and local presence remain critical

factors, particularly in regions like EMEA and North America. To address this, many Indian MSPs are adopting co-managed and hybrid delivery models, combining offshore engineering excellence with on-ground client engagement to deliver both cost efficiency and contextual relevance.

The rise of Tier-2 Indian MSPs signals a broader transformation in the global services landscape. Enterprises are no longer looking for the largest vendors—they are looking for partners who can deliver measurable outcomes with speed, precision, and cost efficiency. In 2026, the global MSP race is being reshaped. Tier-2 Indian players are proving that specialisation, hyperscaler alignment, and execution capability can outperform traditional scale-driven models. The next wave of global leaders will not necessarily be the biggest—but the ones who can deliver cloud, AI, and security transformation faster, smarter, and at scale.

Why Many MSPs Remain Invisible – And What Indian Providers Must Do Differently



Across the global IT services ecosystem, Managed Service Providers (MSPs) are facing a surprising challenge: despite offering critical technology services, many remain largely invisible to potential enterprise buyers. Industry experts say the problem is not capability, but positioning and timing in the modern B2B buying journey. According to recent industry analysis, most MSP marketing looks nearly identical — the same messaging around certifications, cybersecurity capabilities, and “proactive support,” making it difficult for buyers to distinguish one provider from another.

For Indian MSPs, the challenge is even more pronounced as they attempt to expand into global markets such as APAC, the Middle East, Europe,

and North America. Many providers still rely heavily on traditional outbound approaches or vendor-led referrals, while enterprise buyers increasingly conduct extensive research independently before engaging with suppliers. In fact, studies show that B2B buyers spend only about 17% of their purchasing journey interacting directly with vendors, meaning most decisions are shaped long before a sales conversation begins.

This shift is forcing MSPs to rethink how they build visibility and pipeline. Simply offering cloud management, cybersecurity, or infrastructure services is no longer enough. Industry analysts note that what used to be considered differentiation — certifications, vendor partnerships, or managed

services capabilities — has now become table stakes in the market.

The smarter MSPs are responding by building signal-driven demand generation systems rather than relying on isolated inbound or outbound marketing tactics. Instead of waiting for prospects to fill out a form or relying solely on cold outreach, leading providers are identifying companies researching relevant solutions, analyzing intent signals, and initiating conversations with context around the buyer’s current challenges.

Artificial intelligence is also emerging as a major opportunity window for MSPs. As enterprises explore AI adoption, many are looking for trusted technology partners to guide them through issues such as AI security,

infrastructure readiness, and governance. MSPs that position themselves around AI enablement and advisory-led engagement are seeing significantly stronger interest compared to generic managed IT services messaging.

From an India perspective, this shift presents both a challenge and a major opportunity. India hosts a rapidly growing ecosystem of cloud and managed services providers, many of whom are already supporting global enterprises. However, to compete internationally, MSPs will need to invest not only in technical capabilities but also in thought leadership, CXO engagement, and intent-driven demand generation.

Technology leaders say the future of the MSP industry will belong to providers who can connect market signals, customer intent, and sales conversations into one integrated growth engine. In other words, the real differentiator will no longer be the services themselves, but how effectively MSPs identify and engage buyers before competitors even know an opportunity exists.

For Indian MSPs looking to expand globally, the message is clear: visibility in the modern technology market is no longer built through service catalogs alone — it is built through insight, timing, and relevance in the enterprise buying journey.

Indian IT Firms Shielded from West Asia War Shock, Channel Ecosystem Sees Stability Window



Indian IT services companies are likely to remain largely insulated from the ongoing geopolitical tensions in West Asia during the current quarter, according to analyst previews, offering a degree of operational continuity for partners and enterprise technology providers dependent on global delivery pipelines. While the conflict has introduced uncertainty across global markets, early indicators suggest that India's IT sector continues to benefit from diversified client exposure and sustained demand for digital transformation services, reducing the likelihood of immediate disruptions to outsourcing-led delivery models.

For channel partners and system integrators, this stability translates into a continued opportunity pipeline across cloud migration, infrastructure modernization, and automation-led engagements particularly within BFSI and enterprise transformation programs. Analysts note that the primary risks emerging from the conflict are indirect rather than structural.

These include delayed decision cycles, tighter discretionary budgets, and cautious enterprise spending behaviour in select global accounts. However, mission-critical transformation programs remain largely unaffected, as offshore delivery anchored in India continues to support global enterprises even during geopolitical disruptions.

This creates a relatively stable environment for:

- managed service providers
- hybrid cloud partners
- platform engineering specialists
- DevOps automation vendors
- cybersecurity integrators to maintain engagement momentum in existing transformation mandates.

BFSI Remains a Key Stability Anchor for Partner-Led Programs

Sector analysts continue to highlight BFSI as one of the strongest verticals supporting IT services demand, even amid macroeconomic caution

and global geopolitical uncertainty. For partners aligned with banking and financial services programs, this translates into continued traction across:

- regulatory cloud adoption
- platform observability upgrades
- digital lending infrastructure
- fraud analytics modernization
- AI-assisted decisioning systems

This trend reinforces the importance of verticalized solution positioning for channel-led growth strategies in FY26.

Weak Rupee Provides Additional Cushion for Export-Led IT Services

A weaker rupee has further supported Indian IT exporters' earnings outlook, offsetting some macro pressure from slower discretionary technology spending. From a partner ecosystem standpoint, this improves near-term budget visibility for offshore-heavy programs and helps sustain multi-quarter transformation engagements already in execution phases.

Geopolitical Uncertainty May Delay New Deals, Not Cancel Them

The more immediate impact of the West Asia conflict is expected to be

slower decision-making rather than contract cancellations, especially in discretionary transformation projects.

This suggests partners should prepare for:

- longer procurement cycles
- phased rollout approvals
- tighter ROI justification requirements
- incremental modernization strategies instead of large platform shifts rather than a structural slowdown in enterprise technology adoption.

A Strategic Window for Channel Players to Strengthen Positioning

With global enterprises continuing platform modernization despite geopolitical uncertainty, the current environment presents a tactical opportunity for partners to reposition themselves around:

- platform reliability engineering
- AI readiness infrastructure
- governance-aligned cloud adoption
- hybrid security architectures
- automation-led delivery acceleration

As enterprise CIOs prioritize resilience alongside innovation, partners that align offerings with regulated-scale transformation requirements are likely to remain central to the next wave of digital infrastructure investments.

Palo Alto Networks Secures Agentic AI with Prisma AIRS 3.0

Delivering end-to-end discovery, risk assessment and protection across the agentic lifecycle



Palo Alto Networks (NASDAQ: PANW), the global cybersecurity leader, today advances its AI security platform with the launch of Prisma® AIRS™ 3.0. As organizations transition toward a future defined by autonomous agents, Prisma AIRS 3.0 secures the entire Agentic AI lifecycle – enabling enterprises to move from simply observing AI interactions to safely authorizing autonomous execution.

The shift toward an AI-powered enterprise introduces systemic security

challenges – ranging from unmanaged Shadow AI to the critical new frontiers of agentic identity, runtime security, and automated governance. While many enterprises monitor what AI says, they remain blind to what AI does. Prisma AIRS 3.0 closes this gap, providing visibility and securing agents from design to runtime as they execute complex tasks independently.

Anand Oswal, Executive Vice President of AI & Network Security, Palo Alto Networks

“Agentic AI represents a massive leap forward,

moving beyond simple conversation to autonomous action that will redefine productivity. But this shift from “AI that talks” to “AI that acts” introduces new risks – from unmanaged agentic identities to unpredictable runtime behaviors. Prisma AIRS 3.0 provides a comprehensive platform to discover, assess and protect agentic AI, giving our customers the unique ability to confidently, and securely, scale the AI-powered enterprise.”

Prisma AIRS replaces fragmented point solutions with a single platform to

manage the primary threats and risks of AI apps and autonomous agents. The new capabilities allow teams to future-proof their operations as agent ecosystems evolve:

Discover AI Agents Wherever They Live. Organizations can now instantly inventory AI agents, models, and connections across their entire environment. Prisma AIRS identifies agents running in cloud environments, SaaS platforms and locally on endpoints that traditional tools miss.

Assess AI Agent Risk Continuously. Security teams can stop guessing if an agent is safe. Agent Artifact Security maps out an agent’s architecture and scans for vulnerabilities. AI Red Teaming for agents simulates context-aware agentic attacks, discovers AI-related vulnerabilities, and recommends runtime security policies.

Protect AI Ecosystems in Real-Time at Scale. The AI Agent Gateway, currently available in limited preview, provides a central control plane to enforce agent runtime and identity security, governance and observability. Following the close of the proposed Koi acquisition, Agentic Endpoint Security will offer the visibility needed to secure various AI endpoint applications, empowering teams to deploy tools like coding agents at speed without sacrificing safety.

HPE unveils Next-Generation AI Factory and Supercomputing advancements with NVIDIA

New compute and networking offerings pair with full-stack software and services to accelerate AI adoption across service providers, sovereign entities, research labs, and large enterprises



HPE announced significant innovations to the NVIDIA AI Computing by HPE portfolio focused on large-scale AI factories and supercomputers that enable customers to scale, deploy efficiently, and gain faster time-to-insight. The full-stack AI solutions with NVIDIA include tightly integrated compute, GPUs, networking, liquid cooling, software, and services designed for at-scale and sovereign environments. AI-forward organizations and leading research institutions, including Argonne National Laboratory, HLRS, Hudson River Trading (HRT), and the Korea Institute of Science and Technology Information (KISTI), have chosen HPE AI infrastructure and AI factories with NVIDIA to advance innovation.

HPE brings NVIDIA AI solutions to its industry-leading

supercomputing platform

Research laboratories, sovereign entities and large enterprises are rapidly adopting AI to enhance traditional high performance computing (HPC) workloads. For organizations seeking to significantly expedite scientific discovery, HPE is making the following NVIDIA products available on its second-generation exascale-class supercomputing platform designed to unify AI and HPC – the HPE Cray Supercomputing GX5000.

- **HPE introduces one of the first NVIDIA Vera CPU compute blades** – HPE adds a new liquid-cooled NVIDIA compute blade option to its lineup of powerful, next-generation supercomputing solutions. Each HPE Cray Supercomputing GX240 Compute blade features up to 16 NVIDIA Vera

CPUs and is designed to support the most demanding AI compute workloads. The GX240 offers industry-leading density[i] on the NVIDIA Vera platform, scaling up to 40 blades with 640 NVIDIA Vera CPUs, and 56,320 NVIDIA Olympus Arm-compatible cores per rack.

- **More choices for high-performance networking** – Organizations can customize their supercomputers with a choice of networking options optimized for large-scale systems that includes NVIDIA Quantum-X800 InfiniBand. Now available with HPE Cray Supercomputing GX5000, NVIDIA Quantum-X800 InfiniBand switches provide 144 ports of 800 Gb/s connectivity per port with power efficiency

features, including low-power link state and power profiling.

“Having built the three most powerful, exascale supercomputers in the world, HPE is at the forefront of innovation that brings together cutting-edge AI workloads with traditional HPC to accelerate scientific breakthroughs,” said Trish Damkroger, senior vice president and general manager, HPC & AI Infrastructure Solutions at HPE. “Our continued collaboration with NVIDIA helps customers tap into the high-performance density they need to push the boundaries in the fields of medicine, life sciences, engineering, manufacturing, and more.”

Enhancing HPE AI Factory at-scale and sovereign, co-engineered with NVIDIA

In addition to the enhancements of its industry-leading supercomputing platform[ii], HPE is bolstering the HPE AI Factory portfolio for service providers, sovereign entities, and large enterprises with the NVIDIA Vera Rubin platform and NVIDIA Blackwell architecture.

- **At-scale AI deployments for neo-**

clouds – HPE introduces the next-generation NVIDIA Vera Rubin NVL72 by HPE rack-scale system, a flagship AI system engineered for frontier-scale models in excess of 1 trillion parameters. This system, designed for neo-clouds, delivers high efficiency at-scale with 36 NVIDIA Vera CPUs, 72 NVIDIA Rubin GPUs, sixth generation NVIDIA NVLink scale-up networking, NVIDIA ConnectX-9 SuperNIC, and NVIDIA BlueField-4 DPUs along with HPE’s liquid cooling integration, services, and expertise for data center design^[iii] that eases large-scale AI rollouts.

- **High-density GPU server for AI model training and inference** – The HPE Compute XD700 is a new Open Compute Project (OCP)-inspired^[iv] AI server built on NVIDIA HGX Rubin NVL8. The system is designed to deliver higher GPU density per rack and reduce space, power, and cooling costs while increasing AI training and inference throughput. Each rack of XD700 servers supports up to 128 Rubin GPUs, providing double the GPU density compared to the previous generation^[v].

More NVIDIA Blackwell access – The NVIDIA RTX PRO 6000 Blackwell Server Edition GPUs are newly available across all of HPE’s AI factories.

These solutions are enhanced by a number of HPE and NVIDIA software and services updates that lead to faster AI

deployments for customers rolling out large-scale AI projects.

- **HPE AI Factory portfolio is NVIDIA Cloud Partner program-endorsed**

– Through the ongoing engineering collaboration with NVIDIA, HPE’s AI factories are ready for NVIDIA Cloud Provider certification, enabling cloud service providers to streamline the validation process.

Expanding multi-tenancy options for at-scale AI deployments

– HPE enhances the HPE AI Factory portfolio by supporting multi-tenancy models for virtual machines (VMs) with GPU passthrough and secure Kubernetes namespaces through NVIDIA Multi-Instance GPU (MIG) enabled by SUSE Virtualization and SUSE Rancher Prime Suite. This allows service providers to choose between hard and soft tenancy deployment models to fit customer needs.

- **Red Hat integration** – The HPE AI Factory portfolio currently supports Red Hat Enterprise Linux and OpenShift, part of Red Hat AI Enterprise, which integrates with NVIDIA AI Enterprise solutions for customers seeking an enterprise Linux operating system.
- **HPE AI Factory with Mission Control** – HPE AI Factory at scale and HPE AI Factory sovereign will offer NVIDIA Mission Control software, streamlining every aspect of the AI factory from

workload orchestration with NVIDIA Run:ai to NVIDIA Dynamo that addresses monitoring and autonomous recovery – while empowering platform teams to operate efficiently and scale confidently.

Each of these solutions are built leveraging HPE’s services and expertise in datacenter design and liquid cooling^[vi] gained through decades of experience building the largest and most energy-efficient supercomputers in the world^[vii].

“To realize the potential of AI, enterprises and nations require infrastructure that can handle massive-scale model training and HPC workloads,” said Chris Marriott, vice president, Enterprise Platforms at NVIDIA. “Together, HPE and NVIDIA have developed full-stack AI infrastructure that unite accelerated computing, advanced networking and liquid cooling for faster time-to-insight in at-scale and sovereign environments.”

Availability

- HPE Cray Supercomputing GX240 Compute blade with up to 16 NVIDIA Vera CPUs will be available in 2027.
- NVIDIA Quantum-X800 InfiniBand networking is available on HPE Cray Supercomputing GX5000 in 2027.
- The NVIDIA Vera Rubin NVL72 by HPE rack-scale system will be available in December 2026.
- The HPE Compute XD700 will be available in early 2027.

- NVIDIA RTX PRO 6000 Blackwell Server Edition GPUs are available in the HPE AI Factory portfolio
- HPE AI Factory portfolio with multi-scale tenancy and GPU passthrough will be available in Spring 2026.
- Red Hat Enterprise Linux and Red Hat OpenShift integration with NVIDIA is available in HPE AI Factory portfolio today.
- HPE AI Factory at scale and sovereign support of NVIDIA Mission Control software is planned for 2026.

[i] HPE internal market research, March 2026
 [ii] HPE has built and delivered the world’s three fastest exascale supercomputers as of November 2025, as validated by the TOP500
 [iii] Top 80 Data Center Engineering Firms for 2025, BDE, October 2025
 [iv] The Open Compute Project (OCP) defines OCP-inspired products as those that comply with approved OCP specifications or contributions
 [v] Compared to the HPE ProLiant Compute XD685
 [vi] HPE has more than 300 patents and five decades of experience in direct liquid cooling
 [vii] HPE has built and delivered 6 of the 10 fastest supercomputers in the world and 10 of the 20 most energy-efficient supercomputers in the world as validated by November 2025 TOP500 and Green500 lists

CrowdStrike Launches the Charlotte AI AgentWorks Ecosystem for Building Secure Agents

Collaboration partners including Accenture, AWS, Anthropic, Deloitte, Kroll, NVIDIA, OpenAI, Salesforce, and Telefónica Tech accelerate agentic SOC transformation for customers with CrowdStrike's no-code security agent development platform



CrowdStrike introduced the Charlotte AI AgentWorks Ecosystem in collaboration with launch partners including Accenture, Amazon Web Services (AWS), Anthropic, Deloitte, Kroll, NVIDIA, OpenAI, Salesforce, and Telefónica Tech. The ecosystem enables customers

to leverage CrowdStrike's no-code development platform and frontier AI models to securely build, orchestrate, and scale custom security agents, while opening new opportunities for partners to create agentic security businesses on the Falcon® platform.

"AgentWorks enables every Falcon user to build their own agentic security workforce," said Daniel Bernard, chief business officer at CrowdStrike. "The future of security operations isn't humans replaced by agents. It's humans amplified by them. Our ecosystem makes the next-generation of security's workforce available for organizations of all sizes today."

Technology Underpinning Cybersecurity's Agentic Ecosystem

Without writing a single line of code, Charlotte AI AgentWorks enables every security team to build, test, and deploy custom agents directly in the Falcon platform with enterprise-grade security and governance.

Through integrations with leading AI models such as Anthropic Claude, NVIDIA Nemotron, and OpenAI GPT, and AI infrastructure services like Amazon Bedrock and Amazon SageMaker, the AgentWorks ecosystem provides optionality across leading frontier models to accelerate workflows across the security lifecycle.

A Platform for Partners to Build

Technology providers and global system integrators including Accenture, Deloitte, Kroll, Salesforce, and Telefónica Tech are leveraging AgentWorks to open new business opportunities by designing and deploying security agents that meet unique customer needs.

Supporting Quotes

"Organizations face increasingly sophisticated threats that demand machine-speed security operations, yet many struggle to deploy trusted, purpose-built AI at scale," said Rex Thexton, chief technology officer at Accenture Cybersecurity. "Accenture is working with CrowdStrike to address this challenge by bringing greater customization to the agentic SOC, helping clients build tailored agents they can trust. We're proud to be an AgentWorks ecosystem launch partner and together



DANIEL BERNARD,
chief business officer at CrowdStrike

with CrowdStrike, define the future of agentic security.”

“Security teams are under pressure to respond faster and with greater precision as threats grow more complex,” said David Burg, global head of cyber risk at Kroll. “Charlotte AI AgentWorks helps us operationalize AI within managed detection and response – building tailored agents that accelerate investigations and response. Together with CrowdStrike, we’re helping organizations move faster to stop breaches.”

“At Telefónica Tech, we believe the future of cybersecurity operations is agentic by design, where AI agents and human experts operate as a unified system,” said Alejandro Ramos Fraile, global cybersecurity director at Telefónica Tech. “With CrowdStrike’s Charlotte AI AgentWorks, we are accelerating our transition to an AI-Native SOC, industrializing our security expertise into scalable agents that enhance detection, response, and cyber resilience.”

Charlotte Agentic SOAR Securely Orchestrates the AgentWorks Ecosystem

Charlotte Agentic SOAR enables orchestration and trust across the entire agentic SOC value chain, uniting the CrowdStrike Agentic Security Workforce, AgentWorks-built, and trusted third-party agents in a single coordinated system. CrowdStrike’s native AI Detection and Response (AIDR), Agentic SOAR workflow level controls, and AgentWorks guardrails secure agent-to-agent and analyst-to-agent collaboration.

CrowdStrike is opening Charlotte AI AgentWorks to its broader ecosystem, enabling partners to innovate, customers to deploy secure agents to stop breaches, and the entire ecosystem to benefit from Falcon.

To learn more about Charlotte AI AgentWorks innovations and CrowdStrike’s ecosystem:

- Visit booth #N-5845 at RSA
- Read our blog
- Visit our website
- Future Product Disclaimer

This press release may include discussion of unreleased services or features. Any unreleased services or features referenced here are still in development and subject to change. Customers should make their purchase decisions based upon features that are currently available.

Perplexity CEO Aravind Srinivas faces backlash over remarks on AI layoffs and future of work

Aravind Srinivas, CEO of Perplexity AI, has drawn widespread criticism after suggesting that artificial-intelligence-driven job losses could ultimately benefit workers because many people “don’t enjoy their jobs anyway.” His comments have reignited debate across the global technology sector about how leaders should frame the impact of AI on employment.

Speaking during a recent appearance on the All-In Podcast, Srinivas argued that AI disruption should be seen not only as displacement but also as an opportunity for individuals to build independent ventures using emerging tools. He described automation as opening “a new possibility” for people to start small businesses powered by AI capabilities.

However, the remarks quickly triggered backlash on social media and across

industry circles. Critics said the comments underestimated the financial realities faced by workers who depend on stable employment for household income, healthcare, and long-term security. Many observers argued that while AI may reshape job structures, layoffs cannot simply be reframed as positive transitions for most professionals.

The controversy has surfaced at a time when anxiety around AI-led workforce disruption is already rising globally. Analysts note that thousands of technology-sector job reductions in early 2026 have been linked to automation strategies and efficiency initiatives, intensifying concerns about the pace of change in white-collar employment.

Supporters of Srinivas’ perspective point out that AI tools are lowering barriers to entrepreneurship and enabling individuals to manage tasks that previously required larger teams. Still, the broader reaction highlights a widening divide between optimism about AI-driven productivity gains and fears about job stability in the near term.

The episode reflects a deeper shift underway in how technology leaders communicate the future of work—where innovation narratives increasingly intersect with workforce realities, especially as enterprises accelerate adoption of automation across functions.



ARAVIND SRINIVAS,
CEO, Perplexity AI

OEMs Double Down on Partners as MDF Budgets Surge to Drive SME Growth



In a significant shift across the global technology ecosystem, OEMs such as Microsoft, Amazon Web Services, Google Cloud and SAP are increasingly expanding Market Development Fund (MDF) allocations, reinforcing a partner-led growth strategy—especially targeting the SME and mid-market segments. Traditionally seen as a supplementary marketing lever, MDF is now becoming a core GTM investment engine, enabling vendors to scale demand generation without proportionally increasing their direct sales footprint.

This paradox—rising budgets but underutilised funds—is pushing OEMs to rethink MDF execution. The focus is shifting from passive allocation to performance-driven utilization, where partners are expected to deliver measurable outcomes such as BANT-qualified leads, pipeline creation, and deal acceleration. As a result, MDF is no longer about brand visibility

alone—it is increasingly tied to revenue impact and ROI accountability.

Industry leaders are vocal about this transition. A senior partner ecosystem leader at Microsoft emphasised that MDF is now about “co-investing in partner-led growth to expand market reach and accelerate demand generation.” Similarly, within the Amazon Web Services ecosystem, MDF is positioned as a strategic lever to “build pipeline and accelerate customer acquisition through partner-led programs.” These perspectives highlight a broader industry consensus: partners are no longer an extension—they are the primary route to market.

For companies like SAP, the partner ecosystem is central to penetrating fragmented SME markets, where local relationships, domain expertise, and contextual selling play a critical role. SMEs, unlike large enterprises, often rely on trusted partners for technology adoption decisions, making partner-

led engagement the most effective GTM strategy.

The numbers reinforce this trend. According to industry research, MDF programs are specifically designed to drive lead generation, expand market reach, and increase sales through partner ecosystems, effectively turning partners into distributed marketing engines. At the same time, 52% of smaller partners still lack dedicated marketing resources, making OEM-backed MDF support crucial for execution.

This dynamic is particularly relevant in the SME segment, where growth is increasingly driven by cloud adoption, AI integration, and cybersecurity modernisation. OEMs are betting that partners—especially MSPs and ISVs—are best positioned to translate these complex offerings into localized, outcome-driven solutions. As a result, MDF is being channelled into CXO roundtables, targeted account-based marketing (ABM), and intent-driven

outreach programs that directly influence buying decisions.

However, the surge in MDF budgets also comes with increased scrutiny. OEMs are tightening governance frameworks, ensuring that funds are utilised in compliance with program guidelines and deliver measurable returns. The shift toward data-driven MDF utilisation means that partners must now demonstrate clear alignment with target personas, industries, and business outcomes before funds are approved.

For CXOs, this evolution signals a deeper transformation in enterprise GTM models. The traditional vendor-led approach is giving way to an ecosystem-driven strategy, where growth is orchestrated through a network of partners executing localized, high-impact campaigns. The implication is clear: the channel is no longer a support function—it is the primary growth engine. The surge in MDF budgets is not just a financial shift—it is a strategic one. OEMs are effectively outsourcing growth to their partner ecosystems, while partners are evolving from resellers to full-stack GTM enablers. The winners in this new landscape will be those who can combine execution capability with measurable outcomes, leveraging MDF not as a subsidy, but as a scalable growth multipli

BREAKING INTELLIGENCE REPORT

India's Banking CIOs Are Making the Biggest Bets of Their Careers — Right Now.

CIO Intent Intelligence: AI · Cloud · Cybersecurity Landscape of Indian Banking 2026

CXO TV Intelligence Desk · March 19, 2026 · **BFSI EXCLUSIVE**

BFSI CIO Intent Index

<p>46%</p> <p>Potential banking efficiency gain via AI</p> <p><i>RBI FREE-AI Report, 2025</i></p>	<p>₹3.4B</p> <p>India cybersecurity market 2026</p> <p><i>Gartner / CISO Platform</i></p>	<p>13.5B+</p> <p>UPI transactions/month — AI critical</p> <p><i>NPCI Data, Feb 2026</i></p>	<p>\$10.5M</p> <p>RBI fines on 40+ banks in 2024</p> <p><i>RBI Annual Report 2024–25</i></p>	<p>91%</p> <p>CIOs cite speed as #1 AI factor</p> <p><i>CXO TV Intelligence Research, 2026</i></p>
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01 · AI INTENT — WHERE THE MONEY IS GOING

AI Adoption Priority Ranking — India Banking CIOs Intent signal strength based on content analysis, conference tracks, podcast

mentions & RBI guidance alignment

GenAI Has Left the Lab — CIOs Are Deploying in Production
HIGH INTENT

The era of “pilot purgatory” is over. SBI deployed GenAI chatbots for deceased claims processing (January 2025) and internal SOP documentation (February 2025) — both with Responsible AI guardrails baked in. HDFC

Bank is using AI bots for cybersecurity operations. ICICI Bank’s tech expenses hit 10.7% of operating expenses in FY25 — the highest in the sector. CIOs are facing board pressure to demonstrate tangible ROI from AI in 2026. The two fastest payback areas: cost optimisation (30–40% reduction in manual processes) and fraud reduction.

RBI FREE-AI Framework — The Most Important AI Regulation in Indian Banking History
CRITICAL SIGNAL

Issued August 2025, the RBI FREE-AI framework mandates: board-approved AI policies, explainability for all customer-facing AI,



first data sovereignty credentials. Engage the CISO as a co-decision-maker in all technology conversations.

05 Agentic AI — First-Mover Advantage in Operations Orchestration

Only 24% of leaders have deployed agentic AI. Banks want it — but with human oversight built in. Position agentic products with explicit guardrails around financial decisions. Target internal operations orchestration (not lending or payments) to build trust. The 6-month window to establish credibility is now.

model risk management frameworks parallel to credit risk frameworks, and a strong preference for indigenous models over generic third-party LLMs. The RBI has proposed a \$575 million public fund for shared AI infrastructure. Any vendor whose AI product cannot articulate RBI FREE-AI alignment will be blocked at the procurement stage. This is a go-to-market reorientation for the entire technology sector selling to banks.

Agentic AI: The Next Frontier — Banks Are Drawing the Line at Human-in-the-Loop
12–18 MONTH PIPELINE

CXO TV research finds nearly one-in-four Indian enterprise leaders have deployed agentic AI. Banking CIOs signal deep interest but iron-clad boundaries: human-in-the-loop is non-negotiable for all financial decisions. The opportunity is in operations orchestration — automating multi-step internal workflows, compliance checks, and customer journey management. Mid-2026 budgets are expected to flow into augmented decision-making agents. The ICICI Bank leadership outlines a clear AI convergence roadmap: prescriptive → generative → agentic → edge AI.

02. CLOUD STRATEGY-THE SOVEREIGN REVOLUTION
Cloud Investment Priority Map — India Banking Sector 2026

Hybrid cloud (on-prem + public)
Sovereign / community cloud
Cloud-native app modernisation
Legacy core banking migration
Multi-cloud strategy



Ranked by CIO mention frequency across IBEX India conferences, CXO TV interviews, and RBI technology survey (31 banks)

Sovereign Cloud Is 2026’s Most Powerful Procurement Keyword in Indian Banking
DOMINANT NARRATIVE

The DPDP Act combined

requirements across RBI, SEBI, IRDAI, MeitY, NCIIPC, and NPCI make sovereign cloud the path of least resistance for consolidated compliance management.

Cloud Is No Longer an IT Decision — It Is an AI Infrastructure Decision
STRATEGIC SHIFT

applications — they design systems to run intelligence continuously.” GPU-as-a-service providers, AI-optimised cloud architectures, and low-latency data platforms are seeing accelerating demand.

03. CYBER SECURITY-THE NON-DISCRETIONARY BUDGET

+12.4%

Security software growth 2026 — fastest segment
Gartner Security India, 2026

+11.1%

MDR / Managed Detection & Response growth
CISO Platform India Roundtable

+11.1%

Network security investment growth
RBI Cybersecurity Framework

Top Security Technology Priorities — BFSI CIO/CISO 2026



with RBI’s data localisation mandates and 40+ bank fines in 2024 (~\$10.5M) has made sovereign cloud the non-negotiable infrastructure choice. Banks must demonstrate data residency compliance or face regulatory action. CIOs are evaluating domestic cloud providers (ESDS, NIC Cloud, domestic hyperscaler zones) with new urgency. 400+ compliance control

The most profound shift in banking CIO thinking: cloud infrastructure decisions are now being driven by AI workload requirements, not application hosting. GPU availability, data pipeline latency, real-time inference architecture, and model training capacity are the new evaluation criteria. “Banks no longer design systems to run

Zero Trust Is No Longer a Framework — It Is a Regulatory Mandate in Indian Banking
URGENT PRIORITY

The Kotak Mahindra Bank operational restrictions case (RBI barring new digital customer onboarding due to IT/cybersecurity failures) sent a seismic signal through the Indian banking sector.

No CIO wants to face regulatory restrictions on their core business. RBI's 2025 Cybersecurity Framework explicitly mandates Zero Trust architecture, continuous monitoring, and MFA for digital payments — not as best practice but as compliance requirement. India's leading banking CISOs — Sameer Ratoliker (HDFC), Samir Dani (ICICI), and Vinay Tiwari (Axis Bank) — have all been vocal about Zero Trust being the architectural foundation. UPI's 130B+ annual transactions make identity-first security an existential operational requirement.

04 · CIO VOICES — DIRECT INTENT SIGNALS

Ramesh Lakshminarayanan CIO · HDFC Bank "Data, AI & ML are at the center of banking's evolution towards Banking 3.0. AI bots have taken over significant parts of our cybersecurity operations."

Balaji Rajagopalan CTO · State Bank of India "98% of our transactions now flow through alternate digital channels. YONO has 8.77 crore registered users. Our future is cost efficiency through digital, not branch expansion."

Abhay Johorey Former CDO · ICICI Bank / MD Protiviti India "AI is being approached from three equal priorities — growing revenues, optimising costs, and mitigating risks. The convergence of prescriptive, generative, agentic and edge AI is the real gamechanger."

Hemant Verma CIO & CTO · Punjab National Bank "Legacy modernisation is the gateway. Without it, AI and cloud investments cannot deliver ROI. PSU banks are closing the gap — but the clock is ticking."

Anand Venkataraman Head Technology Infrastructure · ICICI Bank "ICICI Bank's technology expenses reached 10.7% of operating expenses in FY25. The intent is clear — build AI-ready infrastructure that doesn't compromise our RBI compliance posture."

05 · REGULATORY FORCING FUNCTIONS — 6 MANDATES SHAPING CIO BUDGETS

AUG 2025 ACTIVE	RBI FREE-AI Framework Mandates board-approved AI policies, explainable models, model risk management, and preference for indigenous AI. \$575M public fund proposed for shared banking AI infrastructure. All AI in credit scoring, fraud and AML, must be auditable. Every AI vendor conversation must now address RBI FREE-AI alignment.
2024-25 ENFORCED	RBI Cybersecurity Framework 2025 Zero Trust architecture mandated. Continuous monitoring, MFA for digital payments. 40+ banks fined ~\$10.5M in 2024. Kotak Mahindra operational restrictions established the precedent: cybersecurity failure = business restriction. No CIO is immune.
2025 ACTIVE	Digital Personal Data Protection (DPDP) Act Strict data residency and processing mandates. 60%+ of APAC financial services firms are reprofiling security investments specifically for DPDP compliance. Sovereign cloud is the leading compliance response across the banking sector.
ONGOING RISK CONTROLS	Multi-Regulator Compliance (RBI, SEBI, IRDAI, MeitY, NCBPC, NPCI) 400+ controls covering data localisation, cybersecurity, KYC, AML, digital lending, AI transparency. Sovereign cloud reduces per-control overhead through consolidated controls framework — the single biggest administrative argument for India-first cloud.
2025 TRANSFORMING	RBI Third-Party Risk & Vendor Management Guidelines Tighter oversight on cloud vendors, AI vendors, and fintech partnerships. Banks must demonstrate vendor risk management at the same rigour as credit risk. Driving vendor consolidation and preference for RBI-empaneled technology providers. AI vendor concentration risk under special scrutiny post FREE-AI.
2026 CRITICAL	UPI Scale & Payment Infrastructure SLAs UPI processing 13.5B+ transactions/month, projected 130B+ annually. RBI tightening MFA mandates for digital payments. CIOs investing in AI-driven load management, real-time fraud prevention, and resilient payment infrastructure. Even 1-second latency at scale means thousands of failed transactions.

06 · CIO INTENT MATRIX — WHAT TO SELL, WHEN, AND TO WHOM

AI — ACTIVE BUYING NOW	CLOUD — ACTIVE BUYING NOW	SECURITY — ACTIVE BUYING NOW	EMERGING — 12-18 MONTH PIPELINE
Fraud detection & AML AI platforms	Sovereign / community cloud platforms	Zero Trust Network Access (ZTNA)	Agentic AI orchestration platforms
GenAI chatbot & virtual agent	Hybrid cloud infrastructure	MDR — Managed Detection & Response	Edge AI for branch & ATM networks
Explainable AI / model governance	Core banking modernisation	Identity threat detection (ITDR)	AI-driven network management
AI compliance automation	Cloud-native data platforms	AI-aware cloud security tools	Embedded banking APIs
Credit underwriting AI models	Managed cloud services (MSP)	DPDP Act compliance tooling	Small / sector-specific LLMs
Internal GenAI (HR, Ops, Docs)	GPU-as-a-service for AI workloads	Third-party risk management	Voice AI (RBI 1400/1500 compliance)

7. BRAND & VENDOR PLAYBOOK TOP 5 CONVERSATION STARTERS

- 01 Lead with RBI FREE-AI compliance documentation**
Every AI vendor pitch must address model explainability, board-level governance, and data sovereignty. CIOs will not approve AI products that cannot demonstrate RBI alignment in writing. Build a 1-page RBI FREE-AI compliance brief for every product in your portfolio.
- 02 PSU Banks: Legacy Modernisation is the Entry Point, Not AI**
SBI, PNB, Bank of India, Central Bank of India, and Bank of Maharashtra represent a massive underserved pipeline. PSU CIOs are 2-3 years behind private banks on cloud-native adoption. Lead with infrastructure modernisation and system reliability — then layer AI use cases once trust is established.
- 03 Security is Non-Discretionary — Frame for Continuous Compliance**
RBI fines, DPDP Act, and rising fraud volumes mean security budgets are protected even in flat IT spend environments. The winning frame is not 'better security' — it is 'regulatory certainty.' Position every security product as a compliance investment with board-reportable outcomes.
- 04 Private Banks: Compete on AI Sophistication and RBI Alignment**
HDFC, ICICI, Kotak, Axis, and IndusInd are AI-native and cloud-advanced. They need next-generation solutions, not fundamentals. Lead with XAI capabilities, vendor concentration risk mitigation, and Indis-

SOURCES & METHODOLOGY

RBI Annual Report 2024-25 · RBI FREE-AI Framework August 2025 · IBEX India Conference 2025 · Gartner Cybersecurity India 2026 · CISO Platform India Roundtables · NPCI UPI Data February 2026 · 12 direct CIO/CISO interactions across SBI, HDFC Bank, ICICI Bank, PNB, Axis Bank, Kotak Mahindra Bank · RBI Technology Survey (31 banks, November 2024)





Agentic AI: The Next Frontier of Enterprise Transformation

Agentic AI is emerging as a major shift in enterprise technology, moving beyond traditional automation and generative AI to systems that can act autonomously, make decisions, and execute tasks.

Unlike earlier AI models that rely on prompts, agentic AI systems can plan, adapt, and collaborate across workflows, enabling enterprises to automate complex, multi-step processes.

This evolution is driving enterprises from experimentation toward real business impact. Organizations are increasingly deploying AI agents in areas like customer service, operations, and IT workflows to improve efficiency and outcomes.

However, adoption is not just about implementing tools. Enterprises must redesign workflows, strengthen data foundations, and ensure governance to fully realize value. Without this, many initiatives risk remaining stuck at the pilot stage.

The rise of agentic AI also signals a broader transformation—AI is becoming an operational layer embedded into core systems, rather than a standalone assistant.

As organizations scale these systems, success will depend on aligning technology with business strategy, ensuring security and compliance, and building infrastructure that supports autonomous decision-making at scale

Kalpana Singhal

KALPANA SINGHAL, Editor, ITPV Channel Magazine
(E-mail: 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:
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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

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
Bangalore: 91-8851119532

OWNED, PRINTED & PUBLISHED BY ANUJ SINGHAL Printed at Modest Graphics Pvt. Ltd., C 52-53, DDA Shed, Okhla Industrial Area, Phase - I, New Delhi-20, Place of Publication: 370A, 2nd Floor, Sant Nagar, East of Kailash, New Delhi-110065, Editor- Anuj Singhal

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