

MY MARKET VISION



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We are one-stop shop for security as we cater end to end. Network security is even more important now than it ever was due to the recent trends that we have seen, especially the attacks on the Indian IT infrastructure. The need for security is increasing as organizations don't want to be caught due to lack of security in their infrastructure. We have also seen a lot of people spending a lot more time with us to understand the security aspects when they are planning their infrastructure deployment. Organizations are taking big steps to secure their infrastructure to make sure they have got everything covered. We recently announced an open solution set to deliver intelligent security and performance across all enterprise locations called 'Adaptive Threat Management Solutions.' These solutions help to close the vulnerability gap between what companies have deployed in their network and what they need, to ensure that business-critical applications can be efficiently delivered at scale regardless of location and security which is intelligent, efficient and ubiquitous.

We have launched Junos Pulse which provides a defense mechanism to the growing usage of mobile devices as the preferred platform for IT transactions. The Juniper Global Threat center provides around-the-clock, global monitoring of mobile security threats to consumers and enterprises. It is the first and only center dedicated to tracking, responding and researching threats to mobile devices, including viruses, spy ware and

other security vulnerabilities that can expose a user's personal, professional and sensitive information.

BFSI has always been a key vertical for us along with the government and defense. All these verticals demand high level of security because of their sensitive nature of information that is at stake.

We have also seen positive interest and movement across all other verticals like manufacturing, healthcare, education etc. The biggest challenge for the industry in general is the availability is skilled manpower, people who can really understand and deploy these technologies.

Trends that we have seen are mainly datacenter consolidation and virtualization with regard to cloud models. Cloud is no more a buzzword, people are actually taking serious steps to deploy these business models. Cloud computing has changed the way enterprises think during deploying applications. In terms of security, multiple vendors

and multiple technology developers are moving towards products and technologies that will have the ability to recognize these virtual machines and virtual connections and keep track of the users on one end and virtual infrastructure on the other end. One statement can be made with certainty that the future of security technologies is moving in two definite directions—one is that security is getting more and more embedded into products today (especially into networking products) and the second is that it is always going to be a race between the good and bad guys. IT has opened a new frontier for war between governments and hostile entities which has added a new dimension to this ongoing race and the stakes are very high.

The future of this market is definitely bright as the impact of a security botch-up is far more in today's environment than it ever was. Government is deploying a lot of infrastructure as security is vital for them. BFSI is under going changes with key initiatives being taken in the areas of financial inclusion. This can not be possible without information security being at the highest levels. Organizations are going to continue expanding and upgrading their infrastructure and security which will play a vital role here. Healthcare and manufacturing verticals are also showing a lot of promise so we are confident that wherever there is an IT deployment, there has to be a strong security solutions and this is where we feel that we can contribute immensely.

India's market for networking hardware continues to grow by factors such as higher PC penetration, adoption of IT by the Indian Government and telecom penetration. Although low key, developments like branch expansions and campus build-outs are also contributing to the growth. Avaya has been focusing on growing market share through strategic product introductions and renewed confidence with existing customers to continue to expand networks with Avaya data product in India. Avaya's integrated roadmap is very well received by customers, partners and analysts. Ethernet switching primarily Gig and 10 Gig has shown significant increase in QoQ and YoY business.

By various estimates networking market in India is growing between 35 percent to 40 percent CAGR. Various projects like APDRP, CWG 2010 and others have allowed market to beat the slow down.

Indian government and PSU are consolidating datacenters which are planning to have Hi-Fi campus network. Telecom backhaul expansion is also a key contributor driving the demand in networking industry in India. All this is driving converge network solution for switching, routing, carrier Ethernet and datacenter virtualization and Wi-Fi

products in India.

Discussing about the deterring factors, lesser penetration, poor telecom network infrastructure coupled with lack of awareness in tier-2 cities are the primary handicapping factors. Despite the fast growth in the telecom network in India, there has not been a proportionate growth in related local equipment manufacturer due to regulatory issues.

According to industry analysts some of the trends in networking for 2011 will be private cloud plans mature and dominate enterprise software agenda with VoIP coming of age in the nation. Unified communications, in its true form will be evolving with a predicted death of the traditional WAN.

IT/TeS and BFSI are two major verticals which will continue to grow in size and will spread to tier-2 and tier-3 cities and will be the major consumer of LAN market, both the segments are coming out of the recession effect and expected to bounce back completely again by 2011.



SANJAY GUPTA
Director—Enterprise, Avaya India

In addition, growth is expected in manufacturing, government and mid market segment as well. As there have been several initiatives to revamp the infrastructure of the country there will be steep growth in the transport vertical including airports.

According to Dax Networks, India's market for networking hardware continues to grow, which is driven by factors such as higher PC penetration and adoption of IT by Indian Government. Telecom penetration. This is perceived to be the greatest opportunity for the future by the hardware vendor community. Additionally, the Indian software and BPO industry is also creating a great potential for employment. All of these make India one of the most exciting markets for IT hardware vendors. As more and more international companies set up office in India, the demand for hardware will increase.

India is the fastest growing IT networking products market in the Asia-Pacific Region. Recently, Dax Networks has forayed into the IP surveillance area by launching a range of IP network video surveillance solutions in India. Fixed IP cameras are an ideal choice to monitor a very specific area or direction and are best suited for indoor applications. Domestic IT market (including hardware) reached \$24.3 billion



SUDHA JAGADISH
CEO, Dax Networks

2.6 percent; software and services spending supported by increasing adoption, grew by almost eight percent.

Government, telecom, financial institutions, manufacturing sector and IT segment are the major vertical spenders in 2009. Broadband penetration, fiber to home, better infrastructure, service deliver and other improvements like voice facilities where the impact made by the telecom sector. As every one knows the telecom sector is the fastest growing sector and India stands second. BSNL GPON rollout was one major contribution by the telecom segment. Government sector contributed with more e-governance initiatives across all departments like ESIC, home department and many more.

The much anticipated launch of 3G and WiMax services will boost the networking market in India in coming years.

in FY09 as against \$23.1 billion in FY08, a growth of 5.3 percent. Hardware grew at