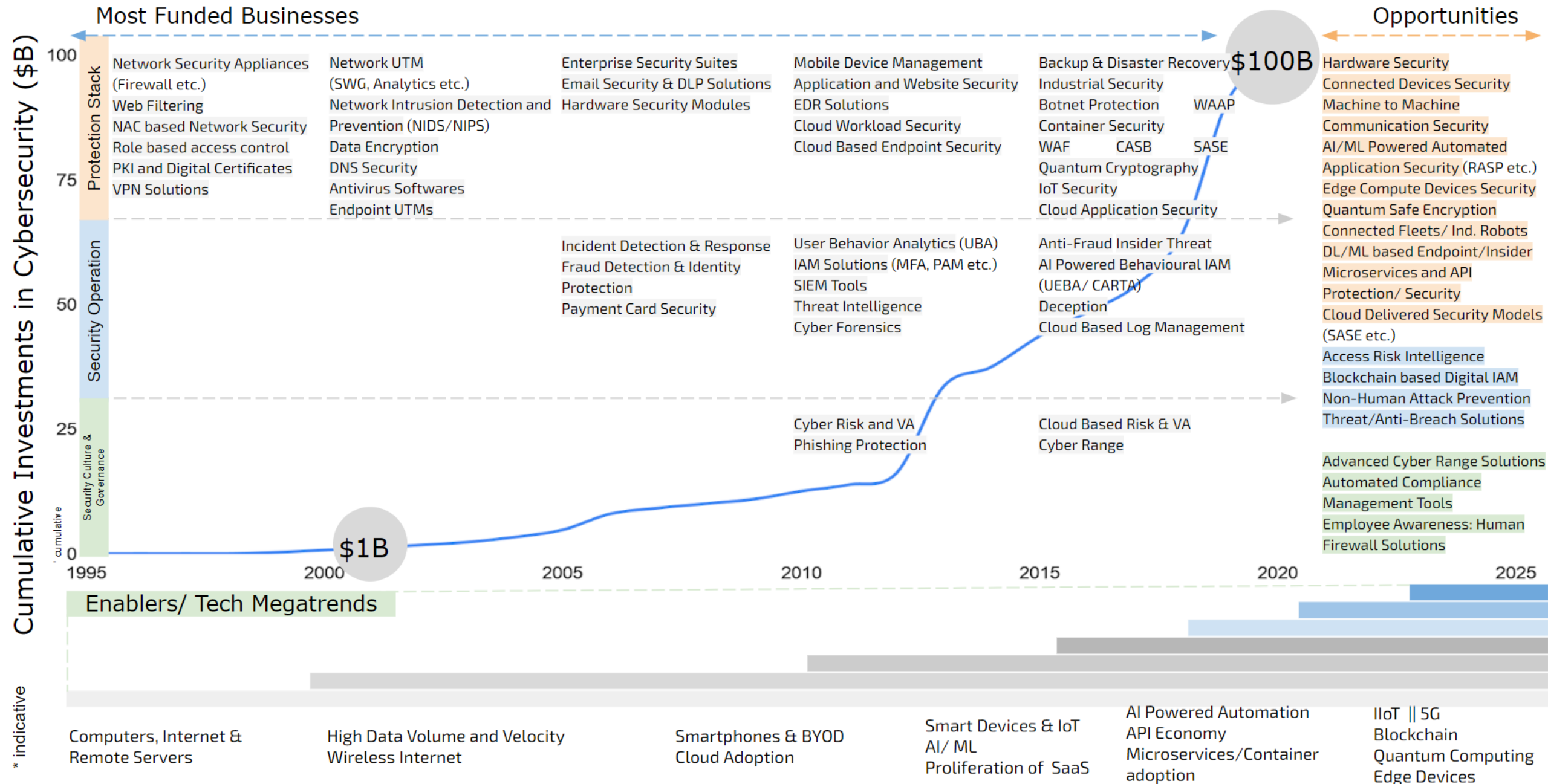


Indian Cybersecurity Product Landscape

...An Emerging Next-gen Cybersecurity Product Hub

Evolution of Cyber Security



* indicative

Innovation In Cyber Security

Traditional SoC's augmented using next gen solutions

SOAR (Security Orchestration, Automation and Response)

Creation of new generation SoC's, i.e. **Fusion Centers**

Leveraging AI/ML to enhance threat management

UEBA and ML capabilities used to establish behavioral fingerprints for advanced risk calculation

AI/ML powered **EDR** and **MDR** deployment for efficient end-point protection and threat management

Predictive analytics deployed to remediate new threat vectors

Shift in cybersecurity service model

Deployment through cloud (Security as a Service)

Platformization of solutions

Cloud security

SASE*

CASB*

Cloud application Discovery

Container and Kubernetes Security

EDRM*

Change in security architecture and thought process

Moving towards security by design ; DevOps to **DevSecOps**

Newer approaches focuses on **open architecture** for peer-to-peer, scalable systems that support edge analytics and remote monitoring

Adoption of SASE

Zero Trust Network Architecture

*Secure access service Edge

*Cloud Access Security Broker

*Enterprise Digital Rights Management

India Emerging as a Cyber Security Global Hub



- Architectural Intervention [DPI]
- Scale & Confidence
- Policy Enablement
- Industry & Innovation
- Technology Adoption

1.36 Billion
World's most extensive unique digital identity program

8 Billion
UPI Transactions in Jan 2023

900 Million
Internet User Base in 2023

\$50 Billion
Domestic Tech Market

\$90+ Billion
Ecommerce Market

250+ Billion
Indian IT Industry

~337.7 Million
Ayushman Bharat Health Accounts in Mar '23

\$21.3T 23.3% YoY
India digital payments

Indian Cyber Security Industry



\$16 Billion
Cyber Security Industry



400,000+
Cybersecurity Talent Pool



300+ CS Product Companies
[25x in 10 years]



300
Professors Engaged in Cybersecurity Research



1570 GCCs+
Many moving security services, engg., R&D in India

Commercial Technology Led Approach [Enterprise Products & Services]

User/ Buyer Industry: DSCI Membership

Capitalize Drivers: Digitization | Real-Time Mgmt. | Response & Recovery

Global Market for Products: Middle East [Currently]

Security Stack using Indian Capabilities [Army] [20+ products]

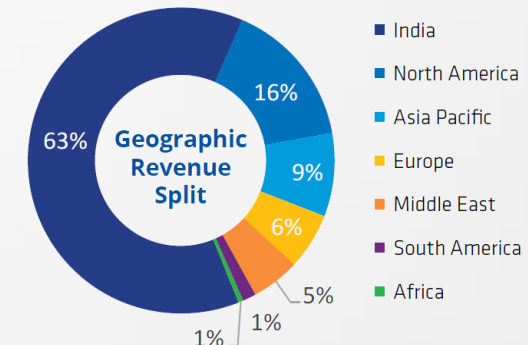
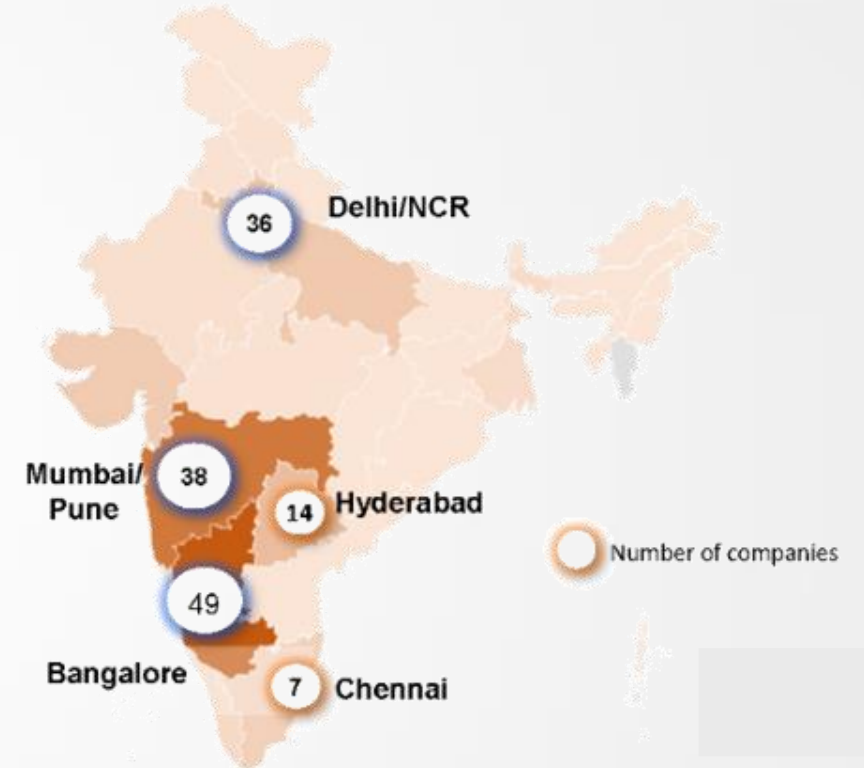
Armed Forces: IDEX Challenge DISC9 [Navy, Army, & Airforce]

Focusing on Service Export GCC Inward Investment

India Cyber Security Product Landscape

300+ Indian security product companies	20% start-ups incorporated in 2 years
USD ~2 Bn Cumulative Revenue in FY2021	~54% filed patents
20% Academic Collaboration	~70% companies are bootstrapped
18 years Average experience of founders	41000+ Total employee base
~80% Cloud Ready Solutions	74% Products leverage AI/ML

Heat Map of Geographic Presence



Indian Cyber Security Product Industry – Scripting a Promising Story

Snapshot from 2020 to 2022



Total Number of Companies



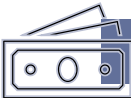
Emerging Start-ups are focusing on solving next-gen & sophisticated Cyber-threats



Workforce



Majority of the workforce is involved in R&D & Product Development

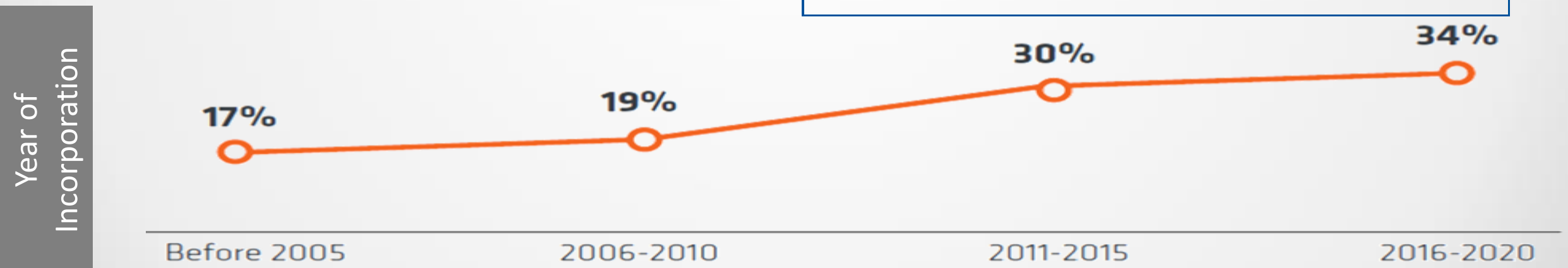
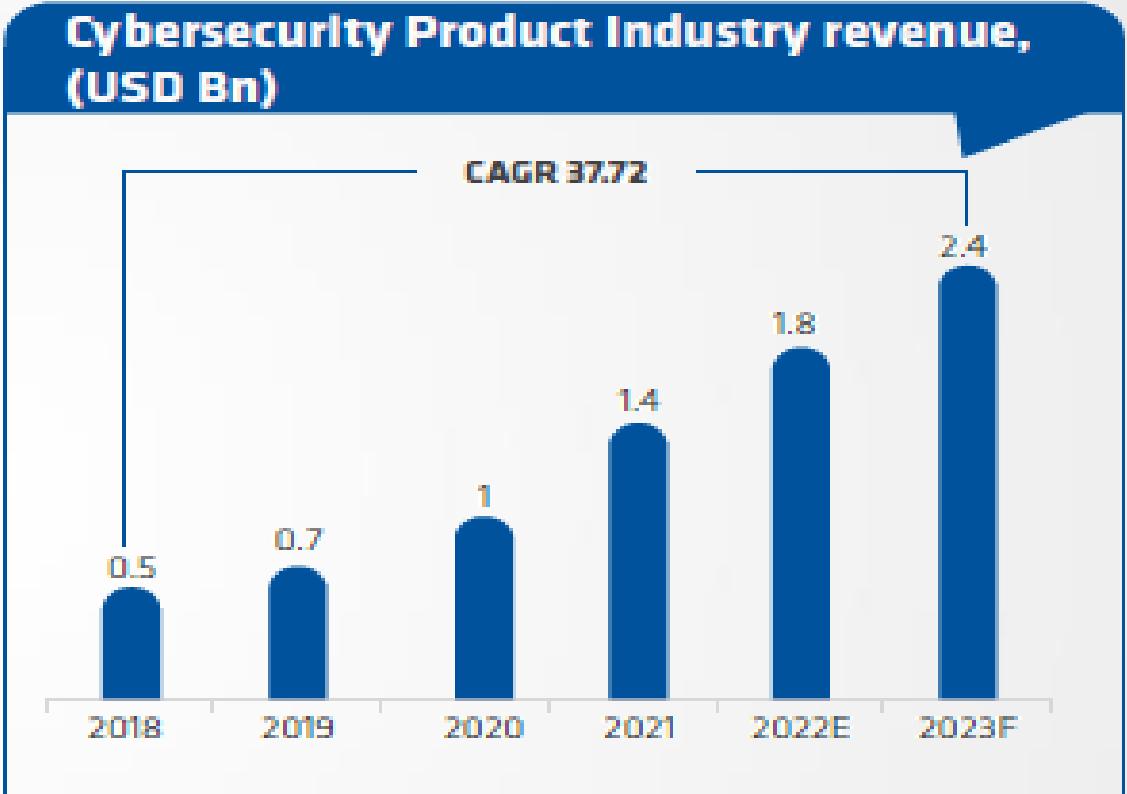
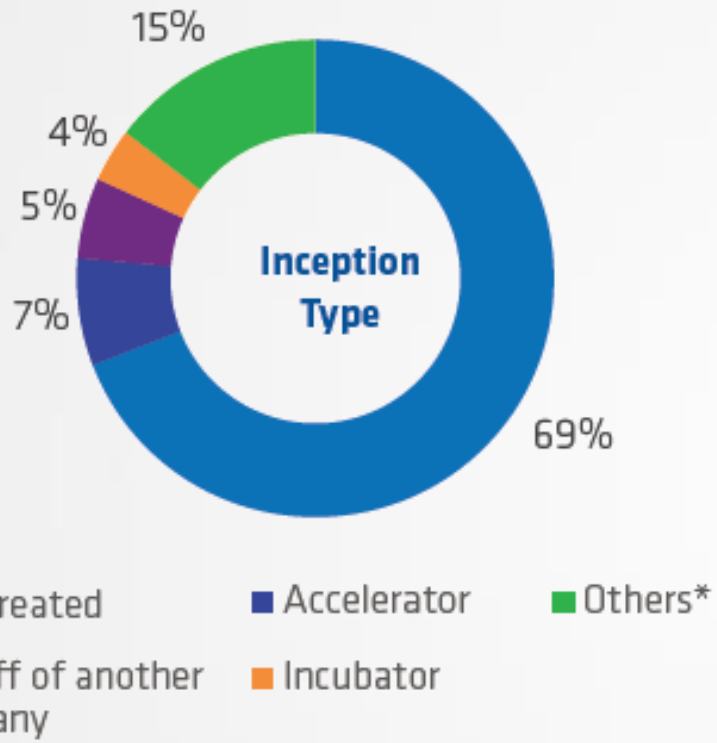


Revenue

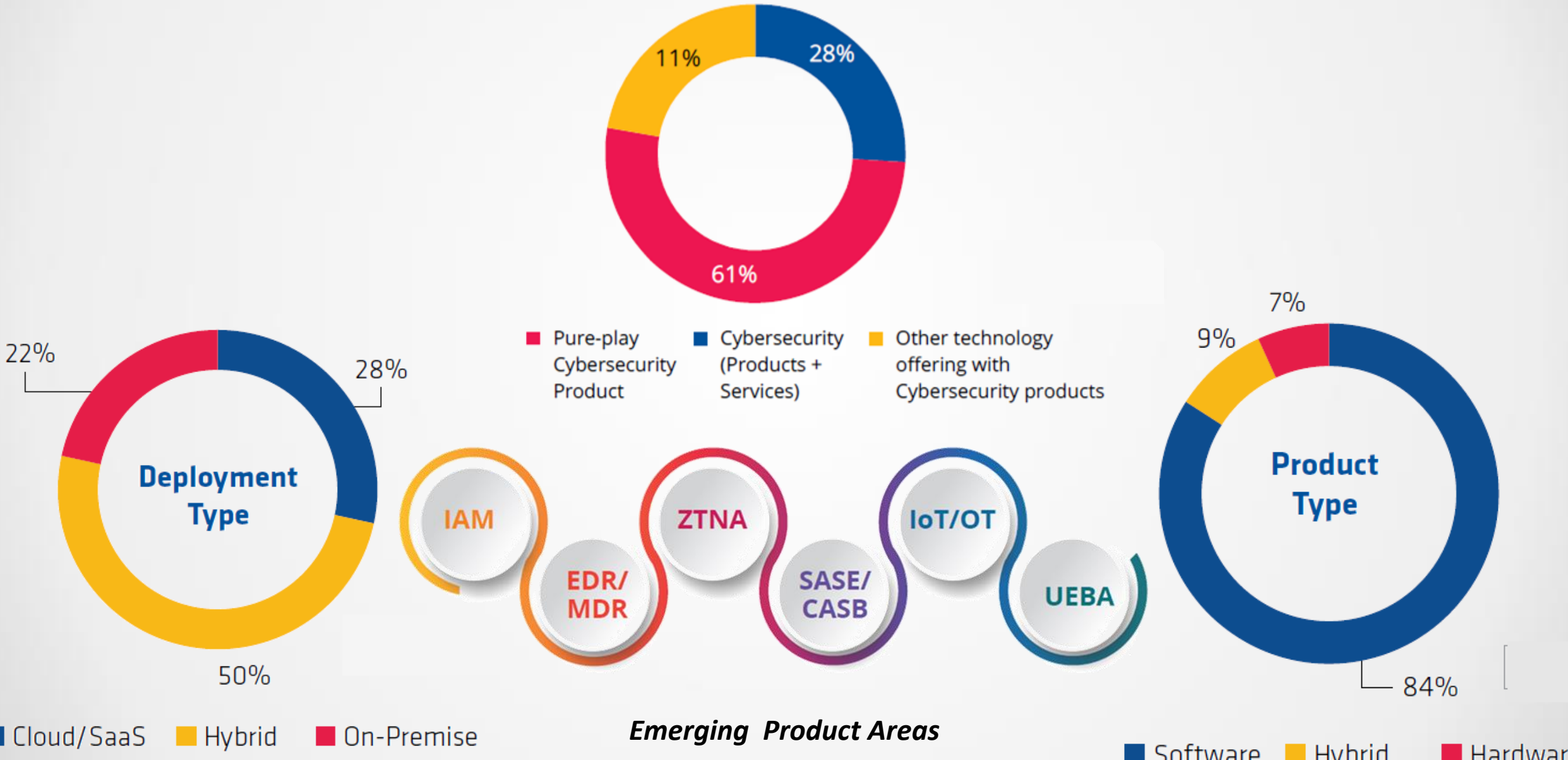


Establishing a strong footprint on global fora and capturing the international market

Inception and Growth

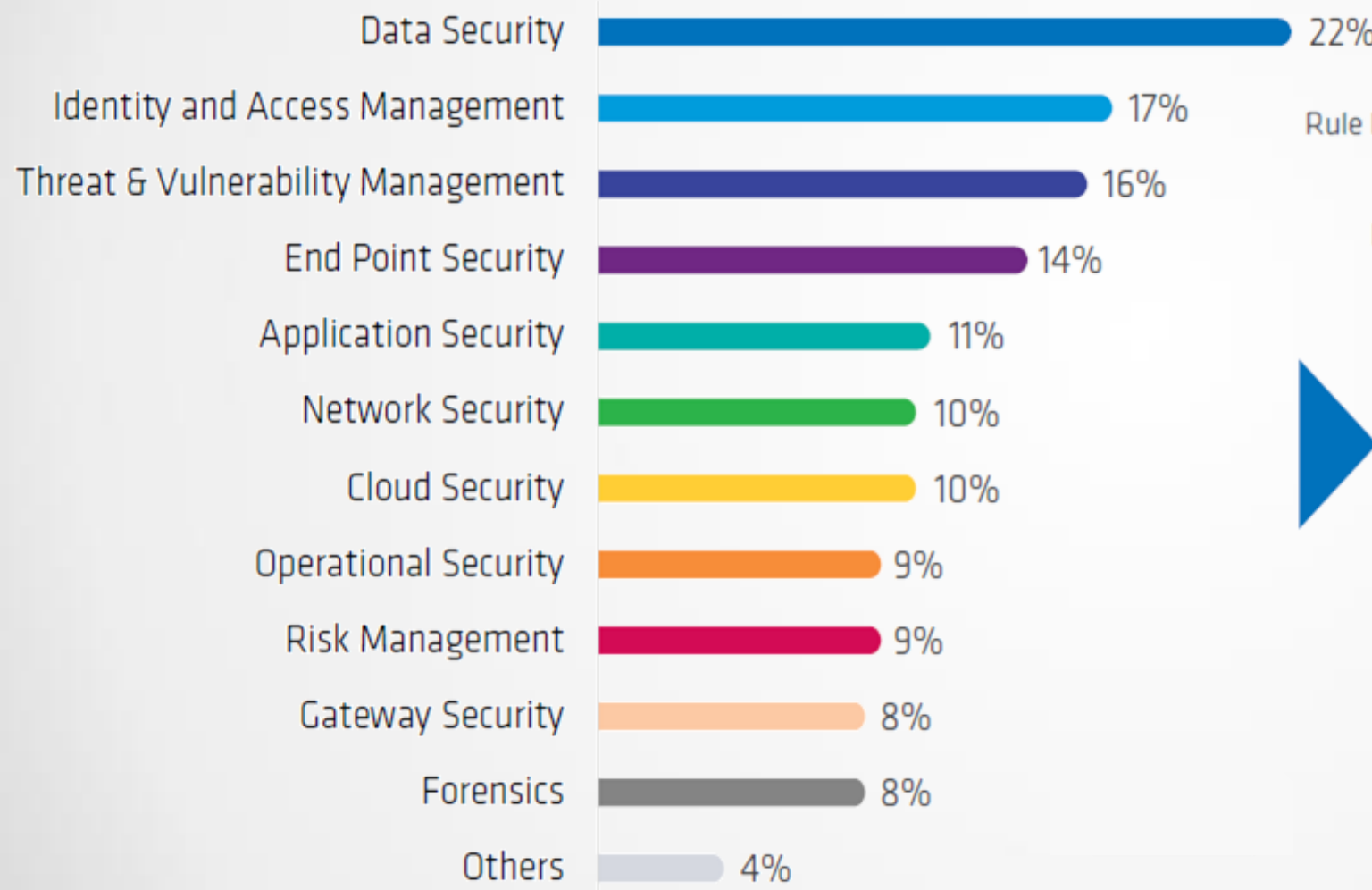


Indian Cyber Security Product Landscape



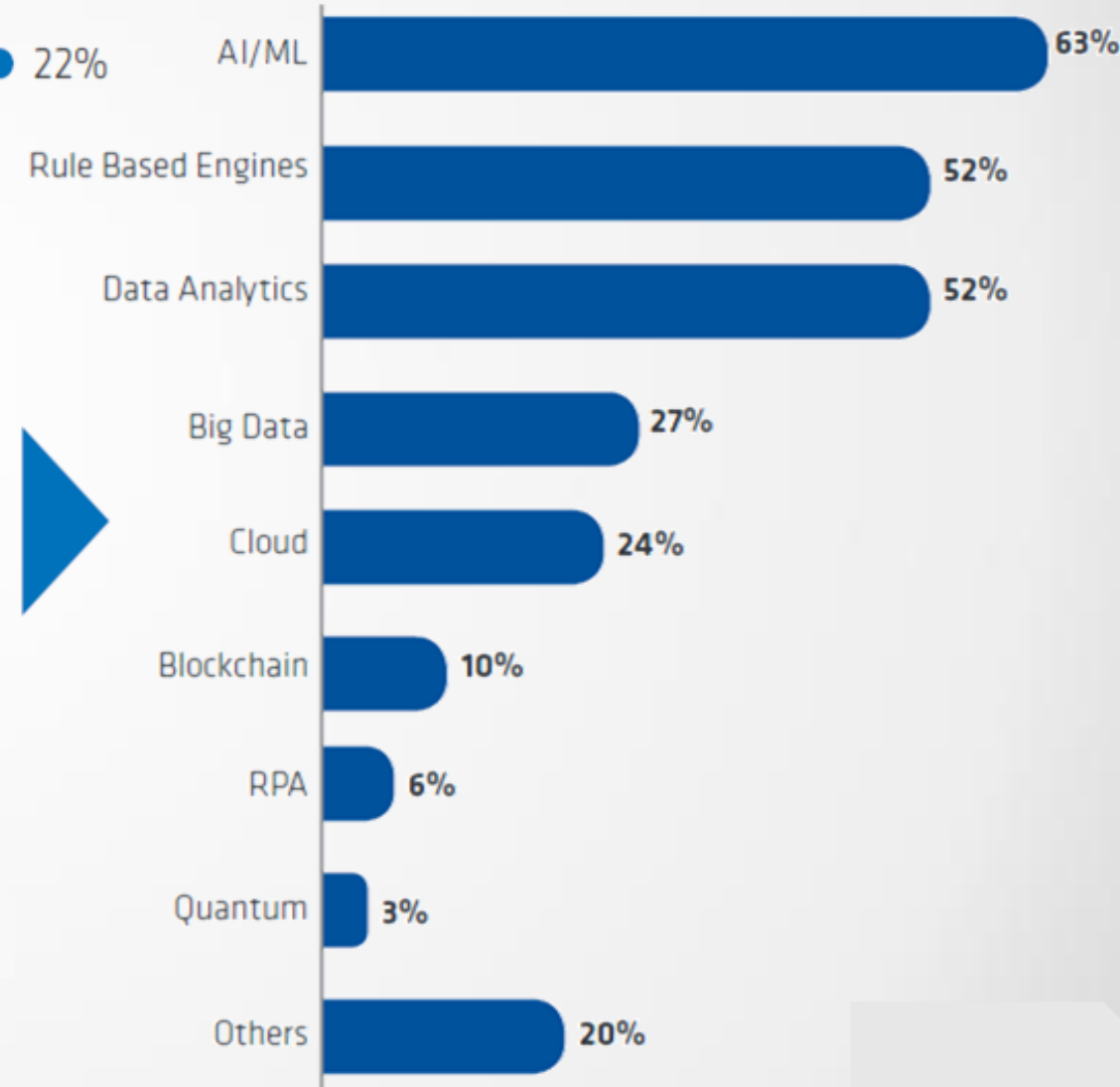
Indian Cyber Security Product – Offerings and Tech Stack

Product Offering Segments



Others Include: Hardware & SCADA Security and IoT Security

Technology Stack Adoption



Work From Home Offerings- Indian Security Startups

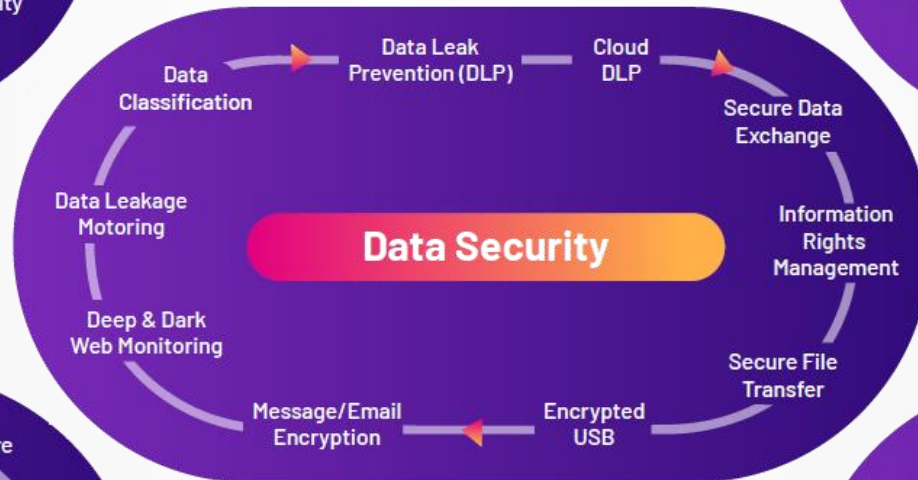
Identity, Access & Authentication



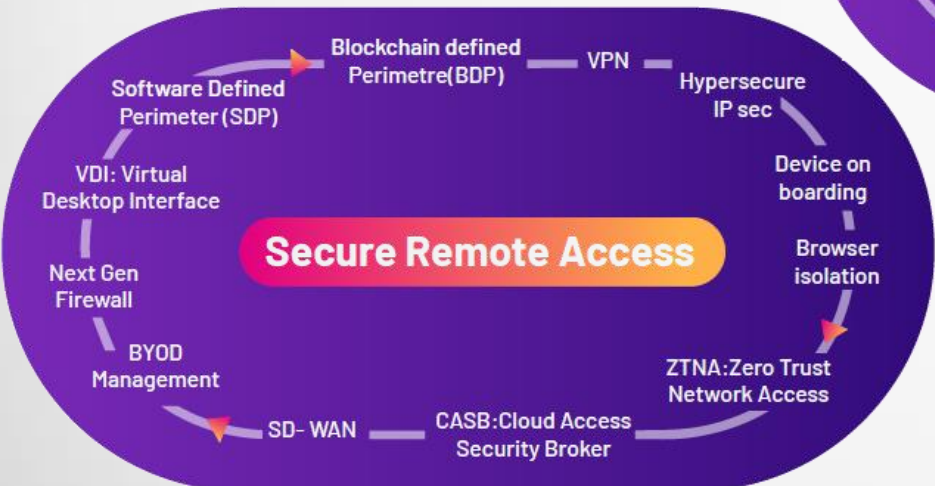
Threat & Vulnerability Management



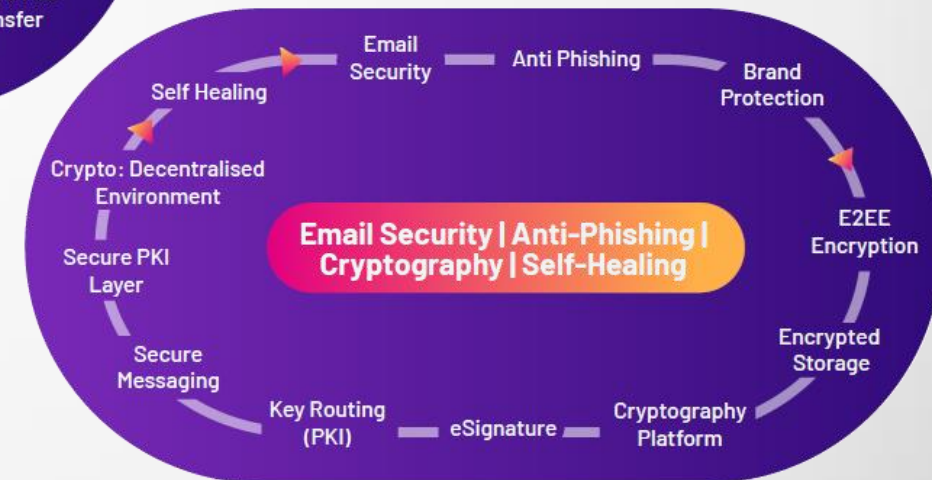
Data Security



Secure Remote Access



Email Security | Anti-Phishing | Cryptography | Self-Healing



Cybersecurity Product Landscape

Application Security



Cloud Security



Data Security



End-Point Security



Operational Security



OT and SCADA Security



Forensics



Identity Access Management



Risk Management



Threat and Vulnerability Management



IoT Security



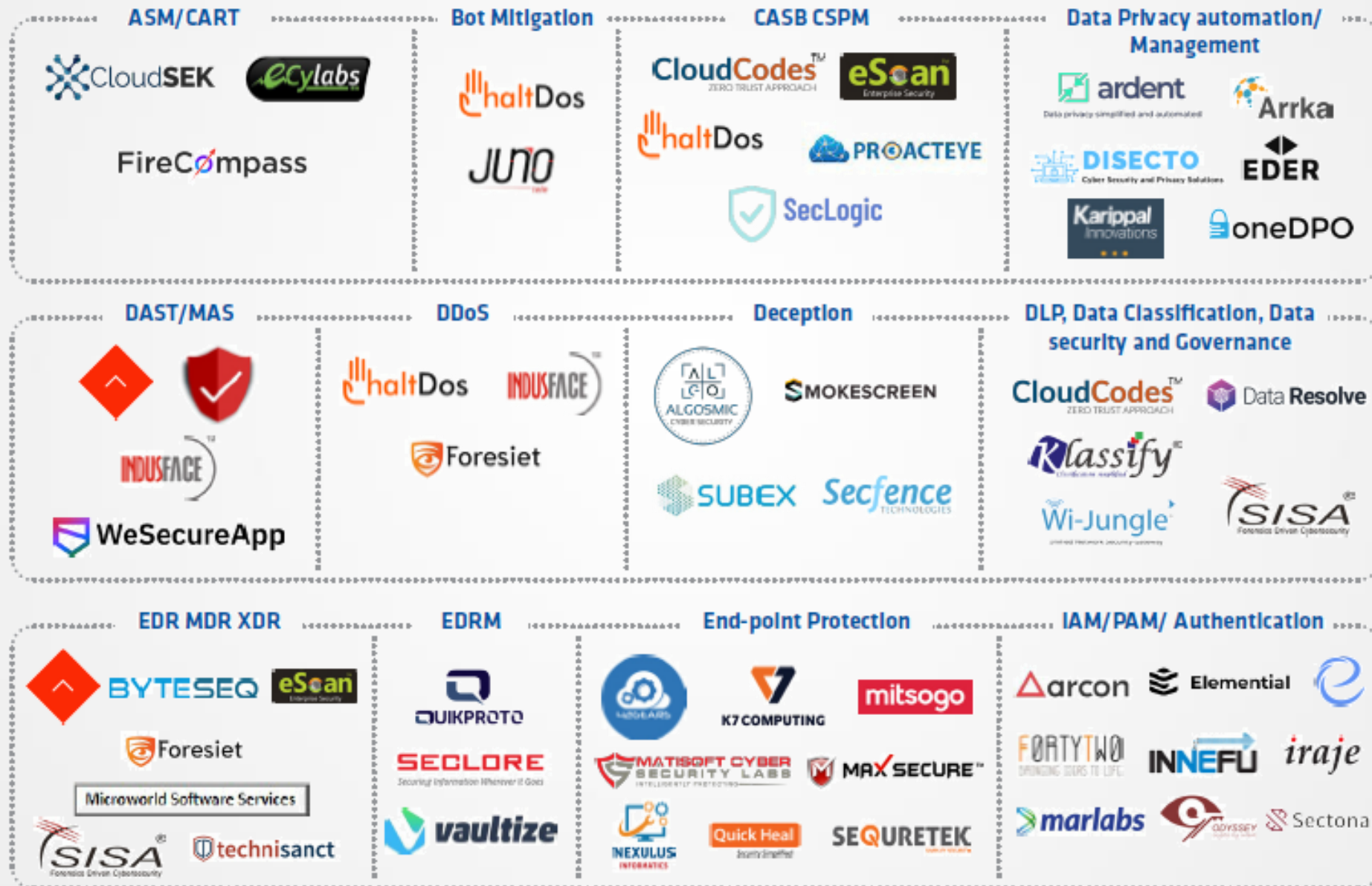
Gateway Security



Network Security



Cybersecurity Product Landscape



Cybersecurity Product Landscape



Indian Privacy Technology Companies



Truthshare

Privacy as a Service



Data privacy simplified and automated.

Ardent Privacy

AI based Data Minimization and
Data Security Platform



Eder Labs

Data Security & Privacy for
AI/ML Workloads



SISA

Data Discovery



ZIROH Labs

Encrypted Computing



OneDPO

Privacy Engineering & privacy in
big data environment



Klassify

Data Classification



SecurelyShare

Separate critical data and
transactional data



Tactical Cyber Range

Multimodal Authentication System



Arrka

Privacy management Platform



DISECTO

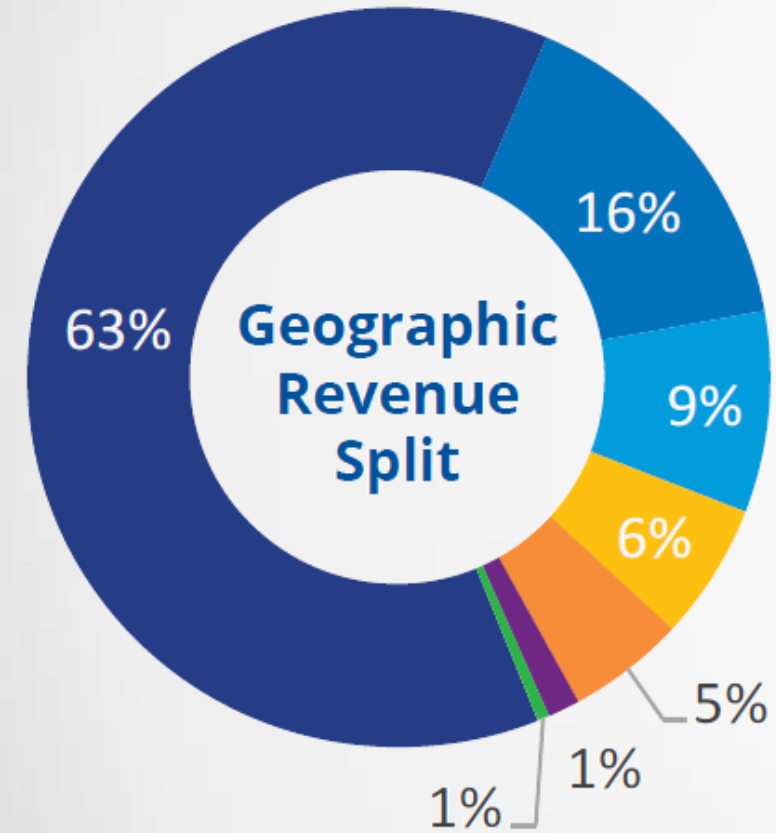
Decentralized privacy-
preserving framework



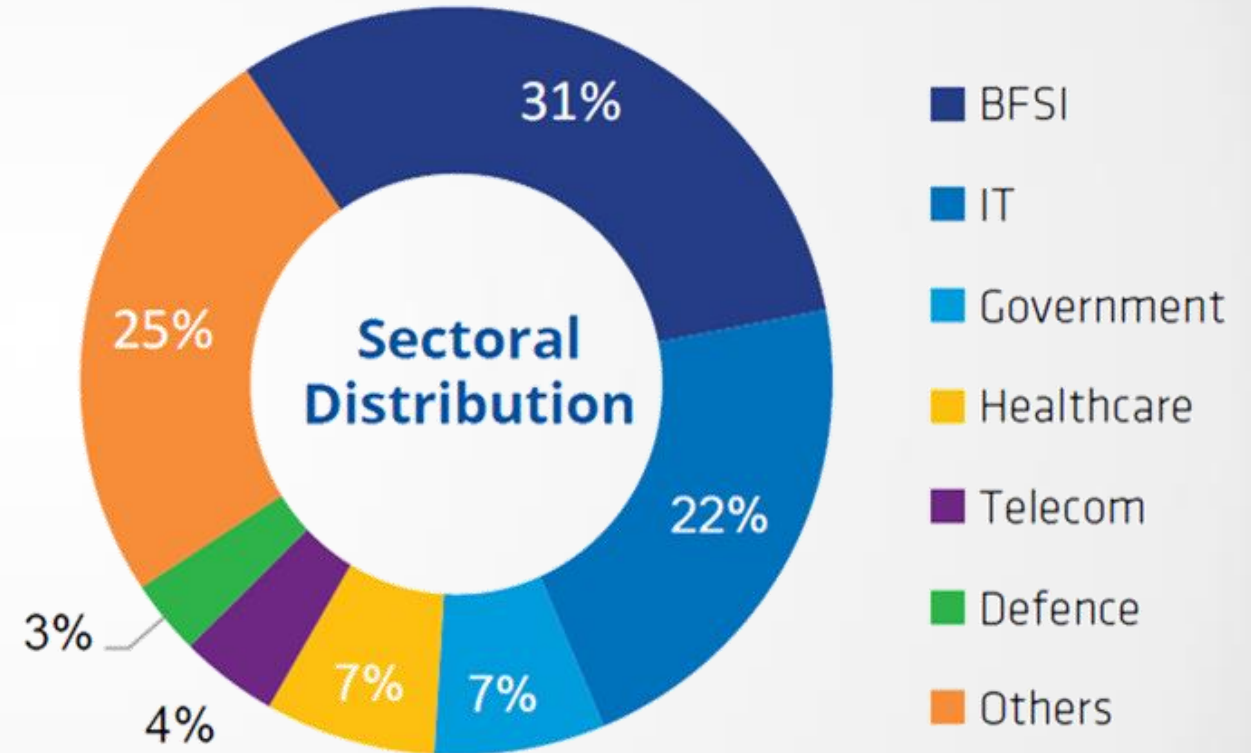
Stellar

Data Recovery

Geographical and Sectoral Coverage



- India
- North America
- Asia Pacific
- Europe
- Middle East
- South America
- Africa



- BFSI
- IT
- Government
- Healthcare
- Telecom
- Defence
- Others

Overall Funding & Investing trends

Funded Companies



Fund Houses



-> its an Indicative list

Key Customers

BFSI



Telecommunication



Others



Information Technology



Consulting



IT enabled services



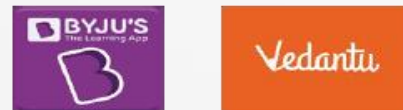
Retail



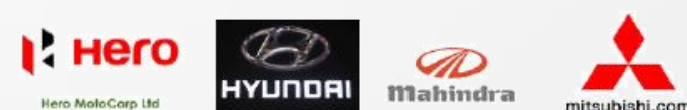
Consumer goods



Academia



Automotive



Aviation



About Industry Development Initiative

Building the Cybersecurity Industry

by
2025



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