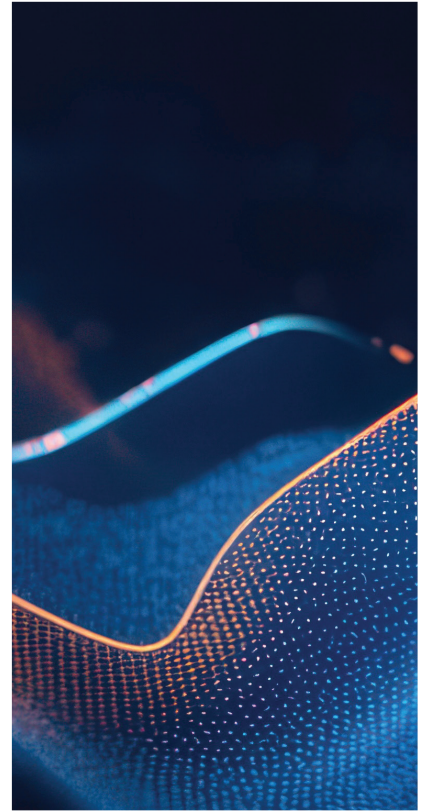
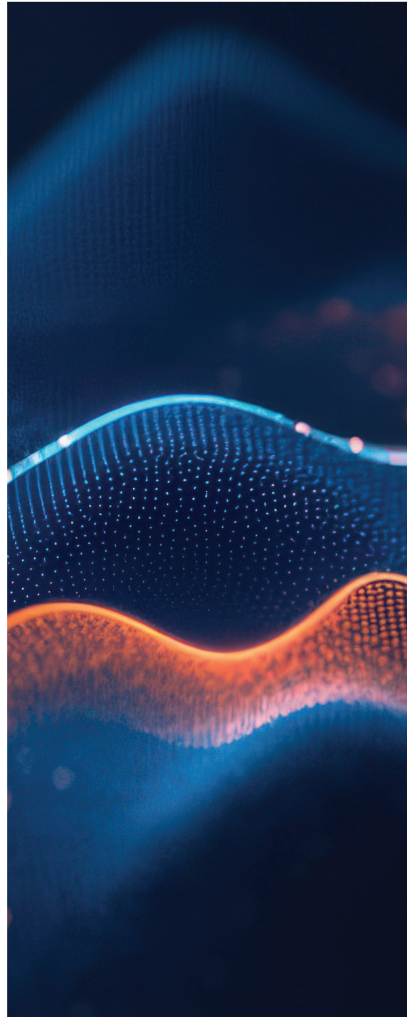


FROST & SULLIVAN
BEST PRACTICES



2026

ASIA-PACIFIC
OSS/BSS

COMPANY OF THE YEAR

Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Netcracker Technology excels in many of the criteria in the APAC OSS/BSS space.

RECOGNITION CRITERIA	
<i>Visionary Innovation & Performance</i>	<i>Customer Impact</i>
Addressing Unmet Needs	Price/Performance Value
Visionary Scenarios Through Megatrends	Customer Purchase Experience
Leadership Focus	Customer Ownership Experience
Best Practices Implementation	Customer Service Experience
Financial Performance	Brand Equity

Addressing Unmet Needs

Netcracker Technology, a subsidiary of NEC Corporation (NEC) headquartered in the United States, is a pioneering innovator responsible for many groundbreaking technological firsts in the telecom industry. The company plays a key role in accelerating generative artificial intelligence (GenAI)-driven autonomous operations, monetizing 5G-Advanced architectures, and delivering cloud-native transformations for communication service providers (CSPs) across the Asia-Pacific (APAC).

The telecom industry is transitioning from passive artificial intelligence (AI) insights to autonomous agentic AI capable of independently executing complex, multi-step workflows. This transition closes the value gap between experimentation and measurable return on investment (ROI) and is a milestone that has triggered the redefining of the competitive landscape in the region. AI-native inclined CSPs desire to move beyond analytics to autonomous, bounded actions that enable zero-touch operations and predictive maintenance, which autonomously resolve issues within defined boundaries. Netcracker Technology addresses this unmet need by ensuring that CSPs know what outcomes to expect and helping them move beyond experimentation in agentic AI toward measurable ROI with real business impact through key performance indicator (KPI)-linked frameworks. The company's success is driven by its ability to execute and deliver business outcomes for CSPs by focusing on CSP requirements and working collaboratively to identify the solutions that can deliver those outcomes.

The company sustains industry leadership by combining rapid, productized delivery with continuous innovation in AI and cross-functional operations (xOps) and strong ecosystem partnerships, ensuring secure, compliant transformations. This approach leverages extensive pre-built assets, domain expertise,

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Mei Lee Quah
Senior Director, ICT Research

and active standards leadership to reduce risk and accelerate time-to-value for CSPs. Global project learning is continuously embedded into reusable assets, such as processes, KPIs, and blueprints. This practice enables faster deployments, lowers operational risk, and increases switching costs. Ongoing investments in AI for IT operations (AIOps), development and operations (DevOps), financial operations (FinOps), security operations (SecOps), and telecom-specific AI agents ensure continuous improvements in automation, operational efficiency, and overall service quality. Strong alliances with hyperscalers, technology providers, and integrators further expand capabilities, ensuring the rapid,

scalable adoption of emerging technologies.

Netcracker Technology's intelligent, domain-trained agent architecture seamlessly translates high-level business objectives into autonomous, execution-driven actions within live operation support system (OSS) and business support system (BSS) workflows. By utilizing an advanced, open orchestration engine that naturally supports standard agent integration interfaces, i.e., Agent-to-Agent (A2A) and Model Context Protocol (MCP), integration interfaces, the framework enables seamless collaboration across both native and third-party systems. Through proven best practices, Joint Development, Center of Excellence, and Ecosystem programs, and built-in governance, its solution provides the critical guardrails and monitoring frameworks required for safe, high-accuracy execution of agents in complex, real-world telecom environments. As a result, its use of agentic AI to automate complex telecom diagnostics, network operations, and service orchestration has been recognized through recent industry accolades that solidify its product leadership.

Visionary Scenarios Through Megatrends

Automation is a fundamental megatrend in the telecom industry because it shifts mobile networks from static infrastructure to dynamic, AI-native platforms. Automation maturity in APAC is rising significantly faster than in Western markets. The telecom industry is experiencing an accelerated migration toward level 5 autonomous networks, with CSPs increasingly leveraging hyper-automation to reduce operational expenditures (OPEX) and manage exponential data demands. To capture these efficiencies, CSPs are prioritizing self-healing network infrastructures that predict outages and self-optimize with minimal human intervention. Achieving this level of autonomy requires the deep integration of intelligent automation into core OSS/BSS suites, including revenue management, resource inventory, and service orchestration. This convergence of business and operational support systems eliminates traditional legacy complexity and poor data quality, paving the way for scalable, zero-touch provisioning and dynamic network slicing.

Netcracker Technology's autonomous networks solution addresses critical industry gaps in interoperability and open interfaces, providing a structured progression toward autonomous network

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Level 4 and beyond. The platform combines cross-domain orchestration with closed-loop service and network lifecycle management, powered by an AI-first framework that utilizes embedded AI agents, digital twins, and advanced data model ontologies. Rather than relying on rigid, rule-based automation, the system uses a telecom-specific AI reasoning engine to analyze real-time relationships between network resources, services, and customer experiences. This

context-aware intelligence enables the platform to instantly detect, analyze, and resolve operational issues, guaranteeing consistent performance with minimal human intervention.

Built on technology-agnostic architecture, Netcracker Technology’s Service and Network Automation solution provides centralized, end-to-end management of traditional and dynamic services across multi-technology, multi-domain, and multi-vendor networks, including 5G, fiber, satellite, and broadband. The company automates every aspect of cross-domain and domain-specific services and networks—from design and deployment to lifecycle management, optimization, and closed-loop assurance—leveraging AI/machine learning (ML), GenAI, and data analytics to maximize automation. By supporting standard data models and open application programming interfaces (APIs), the platform ensures seamless third-party integration, helping CSPs accelerate time-to-market and expand into new digital business sectors. The framework translates high-level operational targets into intent-driven, automated actions, using over 30 specialized agents and 100 pre-configured automation use cases. This extensive library of pre-configured assets enables CSPs to capture implementation best practices immediately, delivering up to 80% asset reuse in multi-domain setups while significantly reducing deployment timelines.

Netcracker Technology’s leadership in mobile network automation has consistently been recognized by industry awards, including recent honors such as the 2026 FutureNet Award for Autonomous Network Operations and the 2025 Outstanding Use Case: Network Automation award at the Light Reading Leading Lights.

Leadership Focus

The transition to an AI-native technology company (techco) represents a foundational evolution for CSPs by embedding intelligence into core operations to create autonomous, self-healing networks, rather than treating AI as a bolt-on utility. This shift, which involves replacing legacy, hardware-heavy systems with agile, AI-driven platforms, is considered the next evolution of the techco model. CSPs in APAC are accelerating their evolution into techcos by adopting automated, AI-driven, and cloud-native solutions.

Netcracker Technology anchors its market leadership in the region on a core thesis of driving the AI-native telco evolution through intelligent automation. By infusing cloud-native OSS/BSS with cutting-edge Agentic AI, the company delivers unmatched strategic value, enabling CSPs to substantially cut operational costs, eliminate structural silos, and automate complex workflows at scale.. Strategic modernization of legacy stacks—such as OSS/BSS cloud migration and OSS transformation—optimizes operations and customer experiences. This highly innovative framework is fully proven out across the company’s expansive regional footprint, serving CSPs across diverse APAC markets, including Japan, Thailand,

Singapore, and the Philippines, positioning the company as the foundational architect for autonomous operations in APAC.

The company acts as a critical strategic enabler by bridging the monetization gap and helping APAC CSPs unlock lucrative enterprise 5G-Advanced revenue streams. To accomplish this, the company addresses entrenched legacy complexity by modernizing rigid, fragmented systems into agile, open architectures, which mitigates operational inertia. This modern architectural foundation empowers carriers to achieve true dynamic scaling, effortlessly meeting the hyper-scale demand for cloud-based telecom services while supporting the high-volume transactional requirements of digital ecosystems. Integrations of GenAI drive efficiency in fraud detection and customer support, while advanced platforms allow CSPs to successfully monetize 5G and deliver personalized digital services.

Netcracker Technology has solidified its position as an industry trailblazer by consistently pioneering innovative solutions that address evolving customer demands, setting the benchmark for product excellence and market agility. By leveraging a customer-centric approach that fosters high retention and deeply embeds its platforms into daily workflows, the company drives consistent, high-margin revenue growth, as highlighted by accelerated adoption rates and expanded service offerings in the telecoms industry. Their leadership is further sustained by disciplined, scalable sales strategies, a strong go-to-market model that maximizes customer lifetime value, and continuous investment in new market expansion, ensuring a sustainable competitive advantage in 2026.

The company is future proofing its business by embedding environmental, social, and governance (ESG) and digital transformation into its core strategy. Netcracker Technology's Security, Governance & Sustainability Solution is a comprehensive, natively embedded offering that unifies AI-driven cybersecurity, end-to-end governance, and ESG sustainability practices across OSS/BSS operations and professional services, helping CSPs build trusted, compliant, and sustainable digital operations from a single point of accountability. By leveraging AI to enhance efficiency and personalization, and transitioning to a sustainable circular economy, it is unlocking high-margin growth while mitigating risks and outpacing industry competitors.

Price/Performance Value

As an NEC company, Netcracker Technology provides the enterprise-grade reliability, financial stability, and scale required for mission-critical operations. Integration with NEC broadens capabilities in security and advanced computing, reinforcing the company as a trusted partner for large-scale deployments. This is essential for CSPs in APAC, where massive subscriber bases and continuous 5G and business-to-business (B2B) evolution demand uninterrupted, multi-service operations.

The company drives digital transformation and operational efficiency across APAC, accelerating time-to-market for new services by 50%. These agility metrics are matched by substantial efficiency gains, reducing complex order-to-activation cycles by up to 40% through intelligent automation and zero-touch provisioning. By stripping out operational friction and replacing fragmented infrastructures, the company's platform drives definitive cost reduction, successfully lowering the total cost of ownership (TCO) for regional CSPs and converting technological modernization into direct bottom-line profitability.

Netcracker Technology's strong customer focus drives continuous engagement, prompting leading CSPs across APAC to renew, maintain, and expand their scope of work. For instance, Japan's Rakuten Mobile extended its partnership to utilize next-generation, AI-enabled Digital BSS, while Indosat in Indonesia expanded its scope to engage the company in fiber-to-the-home (FTTH) services. Furthermore, Singtel leverages the Netcracker Technology Service and Network Automation suite to scale broadband and mobile businesses, optimize support costs, and accelerate business objectives seamlessly across its regional affiliates. By deploying AI-driven platforms and automated B2B capabilities, Singtel can efficiently accelerate enterprise service delivery, monetize its 5G infrastructure, minimize operational costs, and elevate the overall customer experience.

Financial Performance

Netcracker Technology has delivered a highly successful fiscal year, achieving 10% year-over-year (YoY) growth in 2025 and solidifying its position as a primary growth engine for NEC. This robust expansion was driven by a strategic mix of new customer acquisitions, deeper market penetration within existing accounts, and an increased share of predictable, recurring revenues. The company's top-line growth and improved margin stability were propelled by a major surge in AI-led digital transformation initiatives, a 12% to 15% YoY increase in managed services, and expanded strategic relationships with major CSPs. The company's completion of the CSG acquisition in May 2026 will significantly elevate its delivery capabilities and expand its market reach within the region.

Brand Equity

Netcracker Technology provides AI-driven telecom digital transformations in APAC using integrated OSS/BSS, cloud-native architecture, and autonomous AI solutions. Its localized delivery model, regulatory compliance, and green tech initiatives allow major CSPs like AIS, Globe Telecom, Indosat, Maxis, NTT, Optus, Rakuten Mobile, Singtel, SLT-Mobitel, and Sky New Zealand to scale operations and monetize 5G services. The company deepens its long-term investment in APAC by continuously expanding its regional centers of excellence. Its dedicated on-the-ground presence ensures high-touch support for complex organizational transformations. This localized delivery model allows the company to seamlessly navigate intricate project requirements while maintaining strict adherence to highly fragmented regional data sovereignty mandates and localized data protection frameworks.

The company has solidified its branding as a premier architect for telecom digital transformations. This market leadership is underscored by prestigious accolades, including the 2026 AI Excellence Award and 2026 Gold Stevie Awards. These honors highlight the success of its pioneering Agentic AI Solution, which enables CSPs to achieve autonomous decision-making and zero-downtime execution. The company actively champions sustainability by utilizing green tech solutions. By optimizing cloud infrastructure workloads and resource allocation, the company helps regional CSPs minimize their carbon footprints and achieve corporate net-zero environmental objectives.

Operating as a high-trust, execution-led strategic partner, Netcracker Technology manages mission-critical transformations across business and network layers. By utilizing outcome-based models, the company lowers the cost of revenue and builds long-term, predictable relationships. This high-

accountability approach enables the company to capture larger, multi-domain programs that translate directly into sustained customer loyalty, higher revenue quality, and structurally stronger margins.

Conclusion

Netcracker Technology is an execution-led strategic partner and premier architect for telecom digital transformations. It empowers CSPs in APAC to convert technological modernization into bottom-line profitability through market-ready, AI-driven automation. The company's acquisition of CSG expands its global footprint and enriches customer engagement, monetization capabilities, and technological prowess.

For its strong overall performance, Netcracker Technology is presented with Frost & Sullivan's 2026 APAC Company of the Year Recognition in the OSS/BSS industry.

What You Need to Know about the Company of the Year Recognition

Frost & Sullivan's Company of the Year Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Recognition Analysis

For the Company of the Year Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Visionary Innovation & Performance

Addressing Unmet Needs: Customers' unmet or under-served needs are unearthed and addressed to create growth opportunities across the entire value chain

Visionary Scenarios Through Megatrends: Long-range scenarios are incorporated into the innovation strategy by leveraging megatrends and cutting-edge technologies, thereby accelerating the transformational growth journey

Leadership Focus: The company focuses on building a leadership position in core markets to create stiff barriers to entry for new competitors and enhance its future growth potential

Best Practices Implementation: Best-in-class implementation is characterized by processes, tools, or activities that generate consistent, repeatable, and scalable success

Financial Performance: Strong overall business performance is achieved by striking the optimal balance between investing in revenue growth and maximizing operating margin

Customer Impact

Price/Performance Value: Products or services offer the best ROI and superior value compared to similar market offerings

Customer Purchase Experience: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

Customer Ownership Excellence: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

Customer Service Experience: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

VALUE IMPACT			
STEP		WHAT	WHY
1	Opportunity Universe	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	Transformational Model	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	Ecosystem	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	Growth Generator	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	Growth Opportunities	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	Frost Radar	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	Best Practices	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	Companies to Action	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at <http://www.frost.com>.

The Growth Pipeline Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fueled by the Innovation Generator™.

[Learn more.](#)

Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- **Megatrend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

