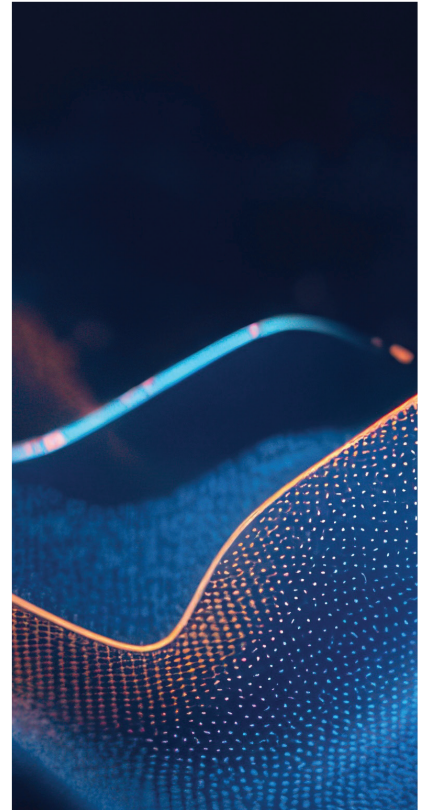
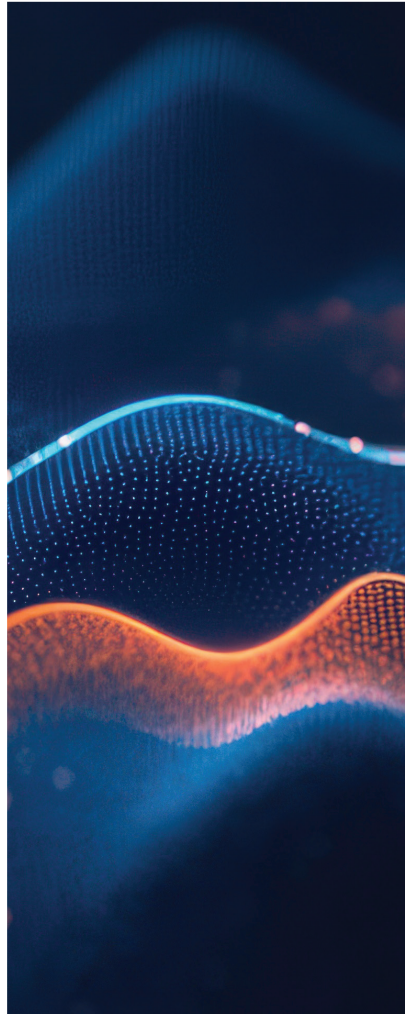


FROST & SULLIVAN
BEST PRACTICES



2026
**GLOBAL OSS/BSS
INDUSTRY**

**TECHNOLOGY INNOVATION
LEADERSHIP**

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 global OSS/BSS space.

RECOGNITION CRITERIA	
<i>Business Impact</i>	<i>Technology Leverage</i>
Financial Performance	Commitment to Innovation
Customer Acquisition	Commitment to Creativity
Operational Efficiency	Stage Gate Efficiency
Growth Potential	Commercialization
Human Capital	Application Diversity

Commitment to Innovation

Netcracker Technology, a subsidiary of NEC Corporation (NEC) headquartered in the United States, offers a comprehensive suite of operations support system (OSS) and business support system (BSS) software that manages customer and network lifecycles. It also helps communication service providers (CSPs) modernize their IT infrastructure through a combination of cloud-native software platforms, artificial intelligence (AI)-driven automation, and a comprehensive suite of professional services.

As agentic systems, autonomous networks, and intelligence-driven business models are redefining the competitive landscape, real-time decision-making capability embedded across business and operational workflows is driving intelligent value creation and reducing operating expenses (OpEx) across customer care, OSS/BSS, and partner operations. In line with industry developments, the company has undertaken to leverage AI to achieve internal and customer transformation. It has focused on the integration of agentic AI, AI agents, and generative AI (GenAI) into mobile networks to improve customer experience and automate mobile network operations. By enabling innovation and creating digital value, these improvements will give mobile networks the autonomous decision-making capability that will drive business growth for CSPs.

Netcracker Technology's AI-Native Telco Open Platform is a comprehensive, open, ready-to-deploy, end-to-end platform operating system that allows CSPs to design, orchestrate, secure, and govern the AI agents that it needs. An accompanying agentic AI solution allows CSPs to access more than 100 telecom-specific AI agents, which have the capabilities to automate tasks like network troubleshooting, billing, sales quotations, and customer service tasks from within OSS/BSS workflows, that can be customized

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Senior Director, ICT Research

using the platform’s Agent Design Studio for rapid agent creation and orchestration. The company’s innovative approach enables in-process automation that is inherently superior to bolt-on augmentation, which creates a fragmented architecture where AI struggles against rigid, legacy constraints, forcing constant human review. In-process automation integrates AI reasoning natively, allowing the system to dynamically plan, execute, and adapt workflows from a core operating layer that spans OSS/BSS, customer experience (CX) channels, monetization

platforms, and partner ecosystems.

Being an open platform, it supports multi-vendor, multi-model environments as a result of the Model Context Protocol (MCP), which is a standardized "universal connector", and Agent-to-Agent (A2A) protocol, which facilitates interoperability based on inter-agent communication. This enables agents and large language models (LLMs) from different providers to work together within a single workflow. Its multi-agent architecture is a unique differentiator for Netcracker Technology as it offers ecosystem agnosticism, pre-built telecom integration, and measurable business return on investment (ROI). The company utilizes this protocol-driven approach to target high-ROI use cases natively while enabling AI to execute complex tasks, e.g., diagnostic evaluation or deployment, by leveraging embedded deep telecom domain expertise and maintaining the flexibility to integrate with existing multi-vendor infrastructure. Flexibility is an increasingly critical requirement as CSPs adopt hybrid AI strategies spanning hyperscalers, sovereign models, and domain-specific AI.

The company’s solutions help CSPs overcome the struggle to scale and prioritize use cases that will improve monetization. To address adoption risk, Netcracker Technology enables a progressive autonomy model, allowing CSPs to transition from assisted decisioning to fully autonomous, closed-loop execution in a controlled manner. Agentic AI capabilities mark a shift from traditional AI augmentation to autonomous, AI-native execution, and the company’s multi-agent orchestration layer ensures execution works across all agents, including third-party agents. By embedding intelligent agents directly into the OSS/BSS platform, these systems independently understand intent, develop strategies, and execute complex workflows without human intervention.

Commitment to Creativity

Netcracker Technology drives digital OSS/BSS evolution by upgrading customer solutions for revenue management, customer relationship management (CRM), and configure, price, quote (CPQ) systems into cloud-native, AI-driven platforms. The company leverages agentic AI embedded into its platforms to enable autonomous operations and real-time decisioning, creating demand for capabilities not yet widely operationalized in the industry. This allows CSPs to successfully enter and monetize underpenetrated segments, including business-to-business (B2B), fiber, wholesale, satellite, and mobile virtual network operators (MVNOs).

Backed by a structured, AI-powered innovation engine, the company commercializes scalable telecom solutions, integrating frontier technologies like production-ready agentic AI to empower CSPs to monetize emerging services. By filtering ideas strictly through a commercial viability lens, the company ensures all innovation—from hackathons to global research and development (R&D)—delivers measurable business outcomes rather than just theoretical prototypes. The company fosters a culture of innovation by empowering employees through an AI-driven professional development framework. This personalized system curates targeted learning paths, identifies opportunities for advancement, and integrates continuous recognition to ensure that employee creativity remains measurable and career-enhancing. Furthermore, a centralized knowledge ecosystem equips employees with future-ready capabilities, directly driving the company's innovation pipeline. With a dedicated R&D allocation to explore new ideas and minimal hierarchical barriers, teams move from concept to proof-of-concept significantly faster than industry norms.

Through joint Centers of Excellence and live customer environments with Tier I CSPs, innovations are stress-tested and validated using telecom-grade digital twins prior to deployment. This approach accelerates innovation cycles while ensuring carrier-grade reliability. Active leadership in global standards bodies and large-scale industry initiatives ensures Netcracker Technology does not just follow innovation trends—it defines them, reinforcing both technical leadership and ecosystem impact.

Customer Acquisition

Netcracker Technology acts as a strategic transformation partner, not just a technology vendor, that shares accountability across the entire lifecycle, providing the continuous engagement and transparency needed for navigating complex CSP transformations. Its customer-facing processes support efficient and consistent new customer acquisition. For example, a library of pre-configured solutions built from 250+ deployments enables prospects to validate solutions in a live sandbox before commitment, resulting in reduced risks (including perceived, financial, and operational risks) and faster internal decision-making. The company's AI-driven professional services leverage standardized methodologies and AI-assisted delivery to ensure rapid deployment, repeatability, and adaptation to specific customer needs without heavy customization.

The company's customers highly value the combination of measurable outcomes, rapid deployment, and extensive out-of-the-box capabilities. Clearly defined business key performance indicators (KPIs) linked to service-level agreements (SLAs) with performance tracked across the full lifecycle ensure transparency, business accountability, and measurable outcomes from the outset. Customers appreciate that engagements are tied to hard metrics, as this helps with value realization and risk reduction. They also appreciate that the minimum viable product (MVP) model gets high-impact features and functionality into production early, as this accelerates ROI. Not having to build workflows from scratch is a major plus, as out-of-the-box capabilities such as pre-built business processes, customer journeys, and industry templates enable faster time-to-market (TTM), reduced complexity, and consistent delivery quality. The company's embedded AI-driven capabilities streamline deal qualification, thereby helping customers handle complex deal configurations, pricing, and solution design quickly, resulting in higher win rates with more accurate proposals. Well-thought-through customer-facing processes supplemented by a strong product portfolio create a powerful combination that is driving customer growth for the company.

Netcracker Technology's growing list of global CSP customers include but is not limited to T-Mobile, Telus, and Rogers in North America (NA), A1 group, Nuuday, Odido, Swisscom, Telenet, Vivacom, One Hungary, and Virgin Media O2 (VMO2) in the European Union (EU), du, e&, Ooredoo Qatar, Vodafone Oman, and Zain in the Middle East and Africa (MEA), and AIS, Globe, Indosat, Maxis, NTT, Optus, Rakuten Mobile, Singtel and SLT-Mobitel in the Asia-Pacific (APAC). Its customers in the satellite industry include global satellite operators such as Telesat, and Viasat, and the traditional satellite-based media companies such as Sky New Zealand and Yes in Israel. Its customers in fiber and broadband include, but are not limited to Globe, Indosat, Swisscom, GFiber and Telecentro.

Commercialization

To thrive in the intelligence era where agility, network reliability, and immersive CX are the drivers of growth, profit, and competitive differentiation, CSPs need to look beyond standalone innovation and actively operationalize AI-driven transformation. Netcracker Technology addresses this need by combining deep domain expertise, a proven delivery culture, and scalable global resources with an AI-native, modular platform that embeds agentic AI and advanced automation into core business functions. This comprehensive approach enables CSPs to tackle critical challenges in monetization, ecosystem expansion, and autonomous operations. The company translates advanced systems into measurable business outcomes, optimizing customer engagement, network reliability, and operational efficiency. Backed by a unified data foundation and structured execution frameworks, this strategy ensures that CSPs can securely generate tangible ROI and track growth through clear KPI-driven metrics. Ultimately, this focus on continuous value creation supports both immediate wins and large-scale, progressive digital transformation journeys.

Netcracker Technology is helping CSPs create new demand in underpenetrated and emerging telecom value pools by enabling them to monetize complex services through the end-to-end automation of the revenue lifecycle and ecosystem-centric monetization, for instance, transaction-based multi-partner, multi-industry business revenues. By driving launches of co-developed innovations, the company has achieved proven commercial scale with agentic AI embedded across all platform releases to fuel enterprise-wide automation. This is driving the adoption of AI-driven operating models ahead of AI-driven market maturity. The company's innovation is translating into

"As CSPs move from legacy systems to cloud-native, SaaS-enabled platforms, driving sustained demand for large-scale digital transformation programs, Netcracker Technology stands to benefit from demand for its strong execution credentials in large-scale digital transformation and expanded capability as a result of the CSG acquisition, namely its SaaS capabilities."

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real commercial scale with agentic AI already deployed across 30+ CSPs in production and select high-value solution areas driving deal expansion, larger contract scope, and increased share of customer investments. Market demand is driven by investments in AI-driven CX automation, which is one of the strongest areas of commercial demand, followed by advanced CPQ for faster B2B segment monetization, robust AI security, and GreenOps. Key segments include non-terrestrial networks (NTN), inclusive of software-defined satellite and hybrid connectivity, and partner enablement to

support multi-brand, wholesale, and partner-driven business models. The highest commercial impact is expected in B2B, partner ecosystems, and hybrid connectivity, where complexity drives demand for integrated, AI-enabled platforms.

Netcracker Technology disrupts traditional operational models by embedding real-time governance, sustainability, and security into core platforms, which is more efficient, compliant, and sustainable, and provides measurable improvements in cost, energy consumption, and risk management. It is notable that within digital CX, the company replaces fragmented, channel-specific engagement models with AI-driven, unified customer lifecycle management. This shifts CX from a reactive service handling approach to proactive, predictive, and continuously optimized engagement. This shift is meaningful because it allows CSPs to maximize customer lifetime value, reduce silent churn, and protect brand equity. By treating customers as continuous journeys rather than fragmented interactions, CSPs organically lower acquisition costs and eliminate revenue-draining service gaps. The next phase of commercial growth will be anchored by AI, scaling deployments across all domains to generate cross-portfolio adoption and continuous recurring revenue for CSPs.

Application Diversity

Netcracker Technology offers a unified cloud-native, AI-driven platform that enables reuse of capabilities across business models, network domains, including mobile, fixed, satellite, and converged environments, and vertical industries—accelerating adoption while minimizing duplication and complexity. Pre-integrated, reusable business configurations allow customers to deploy once and extend across multiple lines of business, services, and operational domains with minimal customization. The company's service- and domain-agnostic microservices support cross-domain digital transformation efficiently and effectively across customer segments, including business-to-customer (B2C), B2B, wholesale, mobile virtual network operator (MVNO), and NetCo/ServCo. Open application programming interfaces (APIs) with built-in API management enable seamless integration into multi-vendor, multi-cloud, and partner ecosystems.

The company's platform is actively deployed across customer segments at British Telecom, Cyta, Claro Brasil, Etisalat, NTT, TDC Brands, Telenet, T-Mobile, VMO2 and Verizon; within network domains at Deutsche Telekom, Maxis, Rakuten, Optus, Swisscom, Telefonica, Telesat, and Viasat; within service layers (including digital services, value-added services, and marketplaces) at du, Telus, Telefonica Ecuador, Verizon and Zain; and within vertical industries such as utilities, public sector, finance, and other industries where companies such as Bechtle, DHL, Powerlink, Airwave and Atos operate.

Revenue generation is often the primary catalyst for technology integration because it promises direct top-line growth and measurable ROI. While efficiency and reliability focus on cost-cutting and stability, revenue-driven initiatives unlock new business models, allowing CSPs to justify interconnected application environments. Within the different customer segments served, focus has been on digital-only onboarding, the Internet of Things (IoT) and private networks, and wholesale automation. CSPs such as TDC Brands and Telenet have been front-runners in this space and are deploying these solutions to capture new enterprise and wholesale revenue. Partner ecosystem monetization centers on business-to-business-to-everything (B2B2X) marketplaces, 5G API monetization, and verticalized ICT and CSPs orchestrate multi-partner platforms to deliver bundles, edge computing, communications-platform-as-a-service (CPaaS),

and private networks. This network-as-a-service (NaaS) model enables CSPs such as Bechtel, Etisalat, Rakuten, and T-Mobile to capture significant new value.

Growth Potential

Netcracker Technology is committed to shaping the future of intelligent connectivity. As a result, its influence amongst customers is growing rapidly, and its services are expanding beyond its core product portfolio. The company's growth potential is expected to be driven by AI projects and end-to-end multi-party services. In 2025, the company experienced a high double-digit year-on-year (YoY) growth in AI projects, well above the industry growth average both for the telecoms industry and AI projects within the telecoms industry. Growth of AI projects is expected to receive a boost from the industry-wide transition from isolated AI use cases to orchestrated, multi-agent systems and from NEC's advanced AI research and development, e.g., on enterprise-grade Cotomi LLM, which is among the best LLM models for the Japanese language. Meanwhile, the company is pioneering its end-to-end multi-party services and is achieving success for customers. As an example of a successful customer outcome, du has seen its revenue potential double as a result of service implementation.

The company's range of customers is expanding within non-core customer segments in the telecoms industry, such as B2B, wholesale, fixed, satellite, and ecosystem-driven models. Increasing complexity in these customer segments is reinforcing the need for the company's products and solutions. This supports stronger positioning for the company in complex and critical environments, especially with its ROI framework as an advisory tool that links all agents to measurable key performance indicators (KPIs), for example, operating expense (OpEx) reduction, TTM improvement, and automation rates. With key KPI metrics demonstrating business improvements despite challenges, CSPs will be able to deliver successful business outcomes and justify continued support for board-level investment.

The completion of the CSG acquisition by NEC in May 2026 will help the company further expand its customer base and revenue potential within the telecom industry and beyond. In the telecoms industry, the company will benefit from customer and revenue growth from NA, with 86% of CSG's revenue derived from NA. Additionally, the acquisition will give the company a stronger hold on the government segment. Beyond the telecoms industry, the company will benefit specifically from CSG's active coverage of the financial services, media and entertainment, healthcare, utilities, retail, and logistics industries, where CSG derives close to 30% of its revenues. In terms of technical capability, the CSG acquisition will result in the company expanding its technical capabilities to include complementary software and software-as-a-service (SaaS) capabilities that can drive enterprise-centric automation opportunities. Expanded capabilities across AI-driven automation, cloud-native platforms, customer engagement, monetization, and operations will ultimately be beneficial to customers.

As CSPs move from legacy systems to cloud-native, SaaS-enabled platforms, driving sustained demand for large-scale digital transformation programs, Netcracker Technology stands to benefit from demand for its strong execution credentials in large-scale digital transformation and expanded capability as a result of the CSG acquisition, namely its SaaS capabilities. The company also stands to benefit from CSPs consolidating vendors and investing in integrated, end-to-end platforms, which increase deal size and duration, as this tends to favor vendors such as Netcracker Technology with full-stack capabilities and a

comprehensive pre-integrated set of capabilities. The company's track record and commitment to business outcomes in large-scale, mission-critical programs position it to capture a larger share of high-value CSP deals compared to competitors.

Lastly, as the telecom industry is experiencing a strong push for operational efficiency, AI and automation are helping to reduce costs for CSPs and are driving a shift toward AI-powered managed services. While this trend heavily impacts major, broad-scope service providers in the mobile network market, Netcracker Technology is comparatively less affected by this pressure within telecom-related IT services. This is because the company is leading the way in driving the growth of autonomous agentic AI systems to address CSP operational efficiency needs, including the need to embed intelligence to close operational loops and manage complex network configurations. The opportunity within telecom-related IT services is projected to grow at approximately 10% YoY in 2026, with AI-based professional services in this category expected to have a 40% to 50% CAGR from 2026 to 2030. These are healthy numbers that are indicative of strong growth potential in the coming years.

Conclusion

Netcracker Technology is a transformative partner to CSPs, helping them integrate agentic AI and GenAI into mobile networks to automate operations and improve CX. Its multi-agent platform enables in-process automation, independent execution of workflows, and measurable business ROI, thereby reducing OpEx and driving growth for CSPs. By embedding agentic AI across all platforms, the company enables CSPs to transform their CX from reactive service handling to predictive lifecycle management, which maximizes lifetime value, reduces churn, and emphasizes top-line growth.

For its strong overall performance, Netcracker Technology is presented with Frost & Sullivan's 2026 Global Technology Innovation Leadership Recognition in the OSS/BSS industry.

What You Need to Know about the Technology Innovation Leadership Recognition

Frost & Sullivan's Technology Innovation Recognition identifies the company that has introduced the best underlying technology for achieving remarkable product and customer success while driving future business value.

Best Practices Recognition Analysis

For the Technology Innovation Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Technology Leverage

Commitment to Innovation: Continuous emerging technology adoption and creation enables new product development and enhances product performance

Commitment to Creativity: Company leverages technology advancements to push the limits of form and function in the pursuit of white space innovation

Stage Gate Efficiency: Technology adoption enhances the stage gate process for launching new products and solutions

Commercialization: Company displays a proven track record of taking new technologies to market with a high success rate

Application Diversity: Company develops and/or integrates technology that serves multiple applications and multiple environments

Business Impact

Financial Performance: Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

Customer Acquisition: Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

Operational Efficiency: Company staff performs assigned tasks productively, quickly, and to a high-quality standard

Growth Potential: Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

Human Capital: Leveraging innovative technology characterizes the company culture, which enhances employee morale and retention

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)

