FROST & SULLIVAN

BEST PRACTICES

2026 GLOBAL SATELLITE OSS/BSS PRODUCT LEADERSHIP

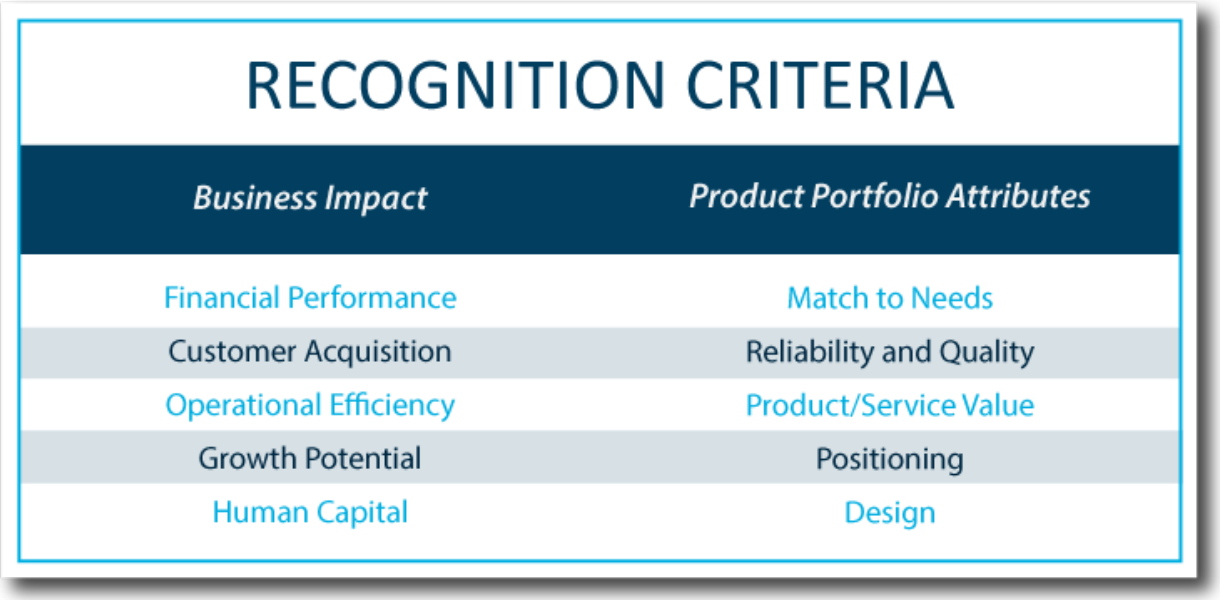
Delivering the Digital Future

Netcracker

An NEC Company

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 satellite OSS/BSS space.



Customer Acquisition

Netcracker Technology, a subsidiary of NEC Corporation (NEC), leverages more than 15 years of experience in the satellite services industry to meet the needs of low-earth orbit (LEO) and geostationary orbit (GEO) satellite operators, such as Telesat and Viasat. The company also provides services to leading communication service providers (CSPs) in the telecoms industry that utilize satellite for backhaul and traditional satellite-based media companies. By combining its specialized satellite knowledge with NEC's extensive heritage of more than 125 years in network infrastructure and strategic partnerships in the telecoms industry, the company bridges the gap between non-terrestrial-based networks and terrestrial-based mobile and fixed networks.

For example, Rakuten Mobile in Japan utilizes Netcracker Technology's business support system (BSS) to manage its digital-first network, which incorporates satellite-focused technologies. It is undertaking research and development (R&D) on artificial intelligence (AI)-enhanced satellite communications to manage the integration of satellite and terrestrial networks. Sky New Zealand utilizes Netcracker Technology to power its revenue management, billing, and customer experience and support its satellite and broadband services. Netcracker Technology has played a key role in Sky New Zealand's evolution from a traditional satellite-based media company into a hybrid, streaming-first media company. Netcracker Technology has also supported the strategic transitioning of Yes, a pay-TV subsidiary of the Israeli telecoms group Bezeq, from traditional satellite-based to fiber-based internet service provider (ISP) services.

> *"Netcracker Technology delivers value by utilizing pre-integrated, modular, and cloud-native architecture that accelerates time-to-market and lowers TCO through automation, while offering extensive, proven experience with major satellite operators."*
>
> ***Mei Lee Quah***
> ***Senior Director, ICT Research***

Its customer-facing processes for satellite-based operation support system (OSS)/BSS drive efficient, consistent customer acquisition by leveraging an omnichannel digital engagement platform that streamlines the lead-to-cash process, enabling rapid onboarding and instant service activation. By offering the advanced, cloud-native Digital Satellite Solution, which includes AI-driven self-service portals, configure, price, quote (CPQ) tools, and a centralized, 360-degree customer view, Netcracker Technology reduces operational friction, allowing users to easily customize, order, and activate complex satellite services across different orbital planes.

This seamless experience directly enhances customer retention, as personalized, real-time engagement and proactive service level agreement (SLA) management reduce churn and build long-term loyalty. Furthermore, the integration of flexible billing schemes and partner ecosystem management ensures superior service quality and monetization processes, fostering trust and sustaining customer relationships in the highly competitive satellite services market. Netcracker Technology brings cross-industry service enablement to the market to offset the commoditization of satellite connectivity that is compressing margins for satellite operators.

Growth Potential

The satellite and telecom industries are rapidly evolving and converging from distinct sectors into a unified ecosystem with non-terrestrial LEO satellite constellations and 5G terrestrial networks complementing one another to provide seamless global coverage and capacity. This complementary partnership is shifting from experimental to mainstream commercial adoption, driven by developments in direct-to-device (D2D) and non-terrestrial networks (NTN) technologies. These technologies enable proprietary devices and smartphones to connect directly to satellites more affordably than before. Once commercially viable, both technologies look set to harness future growth potential and monetization opportunities, especially by bridging the digital divide in remote areas and the maritime and aviation industries.

Although still an emerging but high-value segment, Netcracker Technology is capturing early commercial deployments in software-defined satellite and hybrid connectivity, which is expanding its deal scope and driving monetization potential for the company. Frost & Sullivan expects that the company's satellite-based OSS/BSS products, in particular the Digital Satellite Solution, which addresses the unique challenges of multi-orbit LEO and GEO constellations, enabling automated service management, rapid monetization, and improved SLAs, will drive significant growth for the company.

This growth is fostered by a strong customer focus, where the company works closely with satellite operators to address specific needs, such as delivering premium services and reducing service delivery times, which, in turn, strengthens its brand reputation and reinforces long-term customer loyalty. By offering end-to-end support for the entire digital customer lifecycle, including advanced CPQ, automated fulfillment, and omnichannel support, Netcracker Technology enhances the overall user experience for its

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customers and solidifies its position as a trusted partner to customers in the satellite and telecoms industries.

Match to Needs

Netcracker Technology's satellite-based OSS/BSS product portfolio is directly influenced and inspired by the evolving needs of satellite operators, particularly the demand for managing complex, multi-orbit constellations and hybrid satellite-terrestrial networks. By considering satellite operator goals, such as accelerating time-to-market for new services, improving customer experience, and guaranteeing SLAs, Netcracker Technology designs its solutions to be cloud-native and AI-driven.

Adopting a cloud-native, AI-driven architecture is critical for satellite operators to manage the explosive data volume of modern LEO constellations, enabling real-time autonomous operations, predictive maintenance, and scalable, on-demand services that legacy systems cannot support. Cloud-native microservices allow satellite operators to handle fluctuating data workloads elastically, reducing costs and accelerating service deployment. AI-driven analytics, particularly on-orbit AI edge computing, allow satellites to process, prioritize, and filter data instantly, reducing bandwidth bottlenecks. Combining cloud and AI technologies equips satellite operators with advanced threat detection, proactive anomaly detection, and secure, agile, and sovereign data management capabilities.

Netcracker Technology's customer-centric approach shapes its product portfolio to include advanced, automated, and real-time inventory management, flexible monetization schemes such as usage-based or bandwidth-on-demand, and robust partner management. Consequently, Netcracker Technology positions the Digital Satellite Solution as an essential, high-end platform for the "new space" era, enabling, for instance, the seamless integration of LEO and GEO assets and the support of diverse customer segments (including consumers, enterprise, and government), and ensuring that satellite operator needs for agility and high-performance, automated operations are met.

Reliability and Quality

Netcracker Technology's satellite-based OSS/BSS products consistently exceed customer expectations for performance and long-term reliability by utilizing a cloud-native, AI-driven architecture designed to manage the complexities of modern, high-throughput LEO and GEO satellite constellations. By delivering end-to-end automation, real-time service orchestration, and comprehensive SLA assurance, its Digital Satellite Solution significantly accelerates service creation and helps monetize new opportunities while lowering total cost of ownership (TCO).

The company's groundbreaking multi-orbit blueprint ensures that Netcracker Technology's Digital Satellite Solution is well recognized within the industry for enabling satellite operators to modernize, scale, and deliver high-quality services in a rapidly changing, competitive market. The company's Intelligent Operations Automation, another AI-driven, cloud-native suite designed to automate the full

lifecycle of services and networks, including satellite networks, and IT infrastructure, is an innovation that is particularly notable in the satellite services market and will drive development in non-terrestrial networks.

With over 30 years of experience delivering robust, scalable technology in the telecoms industry, Netcracker Technology ensures high availability and long-term operational sustainability, allowing satellite operators to future-proof their infrastructure, ensure seamless customer experiences, and manage complex, multi-orbit networks with high performance.

Product/Service Value

Netcracker Technology is addressing the urgent need for modernized satellite operations with the Digital Satellite Solution, which enables LEO and GEO satellite operators to transition from niche, legacy operations to dynamic, high-bandwidth services. By integrating real-time, multi-orbit orchestration with comprehensive BSS capabilities, including flexible monetization, customer relationship management (CRM), and AI-driven CPQ, the company directly addresses the complexities of managing, billing, and provisioning for diverse, high-speed satellite-terrestrial networks. The platform supports advanced use cases like D2D communication and maritime applications, providing a single source of truth for resource inventory and service assurance. Netcracker Technology delivers value by utilizing pre-integrated, modular, and cloud-native architecture that accelerates time-to-market and lowers TCO through automation, while offering extensive, proven experience with major satellite operators.

Positioning

Netcracker Technology's Digital Satellite Solution serves a unique, unmet need in the satellite services industry: the ability to monetize, manage, and assure services across dynamic, high-speed LEO and GEO multi-orbit environments. While legacy systems handle static, GEO-only, or terrestrial networks, the company leverages AI-driven, real-time service topology and multi-domain orchestration to solve the extreme latency, beam-hopping, and rapid-switching complexities inherent in LEO constellations. Additionally, the company's specialized, cloud-native platform offers a centralized, 360-degree customer view through a single pane of glass for end-to-end management that competitors, which focus primarily on either standard CSP BSS or basic GEO satellite monitoring, cannot easily replicate, as they lack Netcracker Technology's years of deep, specialized integration expertise with advanced satellite operators.

Conclusion

Addressing a key gap in the satellite services industry, Netcraker Technology's Digital Satellite Solution is unmatched in its ability to address unique, unmet customer needs. Its strong customer focus, deep technical skill sets, extensive track record, and strong branding that reinforces customer loyalty make the company well-positioned to continue to drive significant growth in this space.

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

What You Need to Know about the Product Leadership Recognition

Frost & Sullivan's Product Leadership Recognition identifies the company that offers a product or solution with attributes that deliver the best quality, reliability, and performance in the industry.

Best Practices Recognition Analysis

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

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

Product Portfolio Attributes

Match to Needs: Customer needs directly influence and inspire the product portfolio's design and positioning

Reliability and Quality: Products consistently meet or exceed customer expectations for performance and length of service

Product/Service Value: Products or services offer the best value for the price compared to similar market offerings

Positioning: Product serves a unique, unmet need that competitors cannot easily replicate

Design: Product features an innovative design that enhances both visual appeal and ease of use

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)