NTT DATA

2025

COMPETITIVE STRATEGY LEADER

Transforming Innovation Into High-Growth Performance and Competitiveness

RECOGNIZED FOR BEST PRACTICES IN THE ASIA PACIFIC GENERATIVE AI SOLUTIONS INDUSTRY

FROST & SULLIVAN

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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. NTT DATA excels in many of the criteria in the generative AI solutions space.

RECOGNITION CRITERIA

Strategy Innovation	Customer Impact
Strategy Effectiveness	Price/Performance Value
Strategy Execution	Customer Purchase Experience
Competitive Differentiation	Customer Ownership Experience
Executive Team Alignment	Customer Service Experience
Stakeholder Integration	Brand Equity

The Transformation of the Generative AI Solutions Industry

The Asia-Pacific (APAC) artificial intelligence (AI) space is undergoing a dynamic transformation, fueled by rapid digital adoption, increasing investments in AI initiatives, and a burgeoning ecosystem of innovative startups. Businesses across the region are actively leveraging AI solutions to boost operational efficiency, enhance compliance, personalize customer experiences, improve business outcomes, and drive new revenue streams. This evolution is characterized by a growing demand for sophisticated AI capabilities in areas like natural language processing, computer vision, and machine learning, tailored to the unique linguistic and cultural nuances of the diverse APAC market.

Specifically, as generative AI (GenAI) technology rapidly evolves beyond its experimental phase, businesses across the region significantly ramp up their investments in implementation initiatives. For instance, nearly 82% of global respondents in various industries consider GenAI a highly disruptive technology,[1] with nearly all C-suite executives planning to boost their spending on it. Within this context, organizations must continually reevaluate and realign their strategies and operating models to accommodate the growing adoption of GenAI technology, thereby driving the demand for GenAI solutions.

Despite these promising growth opportunities, several challenges restrict widespread GenAI implementation. The absence of clear strategic frameworks among enterprises that impede the identification of value-driven solutions remains a primary barrier. Furthermore, the absence of a

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[1] *Growth Opportunities in Generative AI Implementation Platforms, Global, 2024-2029* (Frost & Sullivan, January 2025).

structured approach to prioritize use cases and define standardized return on investment models results in ambiguous investment priorities, complicating the path to tangible returns. Businesses also struggle to scale AI solutions due to the complexities involved in model fine-tuning and the limited availability of curated use cases, which extend deployment timelines and increase costs. Additional challenges include security concerns surrounding data privacy and intellectual property (IP), issues with the accuracy of AI outputs, and the overwhelming array of public and open-source AI models that complicate decision-making for businesses.

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>
> *- Kiran Kumar Vijaya Kumar*
> *Research Director*

Service providers must navigate these critical challenges by developing comprehensive strategies, establishing clear prioritization frameworks, and focusing on scalable, secure solutions that align with their customers' long-term objectives to secure growth in the rapidly evolving, complex, and highly competitive market. Frost & Sullivan's research identifies NTT DATA as a frontrunner in this regard.

NTT DATA: End-to-end Approach Facilitating GenAI Transformations

Headquartered in Tokyo, Japan, NTT DATA is a leading global information technology service provider and a key player in the APAC GenAI solutions space. A proud member of NTT Group, one of the world's largest telecommunications conglomerates, the company exemplifies a commitment to innovation, digital transformation, and comprehensive technology solutions, empowering enterprises to move confidently and sustainably into the digital future. To this end, NTT DATA leverages a dedicated GenAI office, over 10,000 data analytics, and AI professionals, and a global network of more than 70 delivery centers and 11 innovation centers across the globe to offer tailored GenAI solutions that adapt to evolving business landscapes.

NTT DATA addresses the complexities around GenAI implementation by leveraging the comprehensive learnings from its own GenAI transformation. The company approaches GenAI implementations with a focus on large-scale production and long-term business value, emphasizing the need to move beyond isolated use cases and ensure organizational readiness for widespread adoption. NTT DATA's strategy involves guiding clients to consider the foundational requirements and scalability of GenAI to drive significant and sustainable benefits, rather than getting fixated on narrow, short-term applications.

Equipped with these unmatched insights and a multidisciplinary team, NTT DATA offers comprehensive GenAI solutions supported by full-stack capabilities, enabling a cohesive technological landscape that facilitates its customers' desired business outcomes. The company's deep end-to-end capabilities incorporate everything from strategic consulting and business engineering, application development and large language model (LLM) integration, robust data infrastructure and connectivity, ethical and compliant deployment, and managed services and ongoing support. By adopting this holistic approach, NTT DATA provides clients a unified and reliable partner, accelerating GenAI adoption and maximizing business value.

More specifically, NTT DATA's end-to-end approach supports clients across their strategy and governance, tools and technology, and transformation journeys.

Strategy and governance

Given the increasing GenAI investments across all sectors, NTT DATA underscores the critical importance of a robust, long-term strategy and a transparent AI governance framework to ensure these financial commitments translate into tangible value creation. Without a clear strategic vision guiding GenAI initiatives, organizations risk inefficient resource allocation and failure to realize the anticipated returns on their significant investments. However, while many businesses claim to possess a data and AI strategy, a mere fraction effectively aligns it with their core business objectives. This misalignment often leads to a rush towards rapid Proof of Concept driven by a fear of missing out on the burgeoning GenAI landscape, without establishing the foundational strategic coherence necessary for successful operationalization and sustained value creation beyond the initial experimentation phase.

NTT DATA leverages a deep understanding of this market gap to help companies define their GenAI journeys, establish a transparent AI governance framework, transform their organizations, develop their technology stacks, and leverage industry-specific knowledge to achieve a competitive edge against its contemporaries.

Tools and technology

The company empowers businesses to build modular, scalable, and multifaceted technology foundations to enable GenAI implementation at scale to meet regional and country-specific needs.

Transformation

NTT DATA allows enterprises to roll out specific use cases to integrate GenAI into business functions, such as spare-part identification and personalized knowledge assistants.

Overall, NTT DATA's distinction as a strategy-to-infrastructure partner ensures its solutions span consulting and advisory services on GenAI strategy, ethics, and responsibilities; use-case development and the prioritization of specific use cases; curated, fit-for-purpose platforms with accelerators and tools; and infrastructure and related services. Therefore, as organizations look to navigate the complexities of the digital era, NTT DATA stands ready to facilitate their ongoing transformations today while laying the groundwork for future growth, ensuring customers are equipped to thrive in the dynamic APAC market.

Comprehensive GenAI Solutions Suite Drives Competitive Differentiation

At the heart of NTT DATA's offerings is a robust suite of GenAI solutions designed to turn complex data challenges into competitive advantages. The company's approach prioritizes practical outcomes, employing proven frameworks that ensure clients not only harness their data effectively but also derive actionable insights that propel their business goals forward. By transforming traditional data analytics through its Decision Architecture framework, NTT DATA enables organizations to unlock their data's full potential, resulting in enhanced decision-making that drives tangible business value. Moreover, the company differentiates its GenAI solutions through proven frameworks that embed fairness, transparency via explainable AI, and robust security measures, aligning with global standards and regional regulations.

Some key examples of NTT DATA's core IP in the GenAI space include GenAI TechHub and aXet:

NTT DATA's **GenAI TechHub** is a developer's workbench that offers a readily available global repository of reusable GenAI assets, including prototypes, components, and solutions, built on scalable infrastructure leveraging major hyperscalers (such as Azure, Amazon Web Services, and Google Cloud Platform) and open-source ecosystems. This free-to-access service for NTT DATA customers, significantly accelerates GenAI use case development and deployment, promising up to 40% faster timelines and a 40% reduction in total cost through shared resources.[2] By providing pre-built modular components, a standardized approach, robust security, and efficient GenAIOps, the TechHub empowers organizations to innovate rapidly, ensure consistency, and achieve a strong return on their GenAI investments.

NTT DATA's **aXet** is a proprietary internal platform leveraging GenAI enablers to significantly enhance development productivity and expedite development timelines. By integrating third-party technologies within a secure, collaborative environment, aXet's no-code and low-code capabilities democratize GenAI capabilities across the software development lifecycle and other tasks. This open platform streamlines workflows, boosts team synergy, and ensures the compliant adoption of advanced AI, ultimately improving the productivity and quality of NTT DATA's service delivery.

In addition, NTT DATA offers a cultivated suite of digital assets to accelerate GenAI use case deployments. Some key examples for the financial services sector include assisted search, global insurance digital platform, PARSONII, conversational AI, and REGLA.

Collectively, NTT DATA's GenAI solutions suite delivers real-world, measurable business outcomes. For instance, the company's expertise, co-innovation approach, and fit-for-purpose solutions help enterprises improve productivity and efficiency by an average of 40%.[3] Other tangible benefits across key GenAI applications include[4]:

- Assisted search: 75% less time spent searching information using a conversational assistant
- Structured content generation: up to 25% less time spent on creation and over 90% of generated content meets structure and expectations
- Creative content generation: more than 50% less time spent on creation with high accuracy and low risk of hallucination with specialized constrained models
- Conversational automation: up to 50% less manual support with conversational self-care, up to 70% request automation, and more than 70% request routing accuracy
- Information processing: over 80% accuracy for summarization, extraction, and classification and more than 90% faster than manual processing

Equipped with this differentiated GenAI solutions portfolio, Frost & Sullivan believes NTT DATA is uniquely prepared for today's demands and exceptionally positioned for tomorrow's needs.

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[2] https://www.nttdata.com/global/en/-/media/nttdataglobal/1_files/services/generative-ai/genai-industry-services/genai-techhub-flyer_2025.pdf?rev=d308b6fd4f58411a9f501b761022450b
[3] https://www.nttdata.com/global/en/insights/reports/generative-ai#:~:text=Through%20our%20expertise%2C%20coinnovation%20approach,unlock%20unprecedented%20opportunities%20for%20growth.
[4] Frost & Sullivan's discussion with NTT DATA (March 2025)

Spearheading Innovation through In-House R&D and Strategic Collaborations

NTT DATA strengthens the competitive differentiation afforded by its comprehensive, proven GenAI solutions suite through a relentless pursuit of market-driven innovation, anticipating future policy and technology shifts to deliver client-centric outcomes. The company underpins this commitment through a substantial annual R&D investment of $3.6 billion (within the NTT Group), a global network of 11 innovation centers, and a team of over 5,000 R&D professionals. Specifically, NTT DATA invests heavily in IOWN, its global R&D platform, to drive AI innovation. This proactive approach, combined with a diverse global team, a robust IP portfolio, and a strong AI governance framework, ensures the provision of flexible, scalable, and ethically compliant AI strategies, deployments, and operations tailored to meet its customers' unique needs.

NTT DATA's March 2024 launch of **tsuzumi**, its proprietary high-performance and resource-efficient LLM, is an excellent example of its IP expansion efforts. Developed in-house by leveraging over 40 years of natural language processing expertise from NTT Laboratories, this lightweight, small language model is designed for efficient fine-tuning. Notably, tsuzumi excels in Japanese language processing, while also supporting both Japanese and English. Its ability to allow inferencing on a single Graphics Processing Unit or Central Processing Unit and seamless integration with Azure services makes it a powerful solution for businesses deploying advanced AI capabilities at scale.[5]

Moreover, NTT DATA's innovation efforts are strategically directed towards anticipating and addressing evolving market demands within the GenAI space. For instance, recognizing the growing emphasis on agentic AI, the company launched a suite of intelligent AI agents across diverse sectors, including legal, accounting, sales, and human resources, that transcend traditional automation by incorporating sophisticated judgment capabilities. Furthermore, the beta release of the agentic orchestration platform further exemplifies NTT DATA's commitment to offering transformative agentic AI technologies.

Furthermore, in January 2025, NTT DATA launched its **Smart AI Agent™** as a strategically designed next-generation agentic AI tool to accelerate AI adoption, enhance operational efficiency, address global talent shortages, and empower businesses with intelligent automation, aiming to generate $2 billion in revenue by 2027.[6] By autonomously extracting, organizing, and executing tasks, the Smart AI Agent™ enables businesses to rapidly evaluate and deploy AI applications, optimize workflows, and realize the transformative value of AI technology across various industries.

Similarly, in March 2025, NTT DATA launched its **Agentic AI Services** to meet the increasing demand for agentic AI solutions that offer personalized experiences, delivering scalable, AI-powered automation for clients.[7] This comprehensive suite of cloud-managed services empowers organizations to seamlessly adopt, build, manage, and scale AI-powered agents, leveraging hyperscalers to drive unprecedented efficiencies, fast-track innovation, and deliver measurable business value.

NTT DATA's innovation initiatives go beyond its in-house R&D-related efforts to open innovation in collaboration with startups, academic institutions, and strategic technology and accelerator partners. To

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[5] https://group.ntt/en/magazine/blog/tsuzumi/
[6] https://www.nttdata.com/global/en/news/press-release/2025/january/012800
[7] https://services.global.ntt/en-US/newsroom/ntt-data-agentic-ai-services-for-hyperscaler-technologies

this end, the company strategically cultivates a broad ecosystem of robust partnerships with leading cloud providers (such as Google Cloud and Microsoft Azure) and enterprise application vendors (like ServiceNow and SAP) to complement and advance its innovation activities. NTT DATA leverages the deep technical expertise and comprehensive support offered through these alliances to deliver end-to-end services, ensuring seamless integration and optimal performance, thus solidifying its position as a premier AI solutions provider in the region.

For instance, in January 2025, NTT DATA signed a strategic partnership agreement with Databricks Inc. (Databricks) to further enhance the capabilities of its data and AI platforms. By leveraging Databricks' unified "Data Intelligence Platform," the company aims to create advanced AI agents that combine tsuzumi's customizable, lightweight LLM with conventional AI and GenAI, enabling human-like task execution. This collaboration not only enhances NTT DATA's data and AI platforms but also facilitates the development of specialized AI solutions, ultimately promoting the democratization of data and AI.[8]

With its continual in-house R&D and collaborative innovation efforts, NTT DATA actively integrates GenAI capabilities into its existing solutions portfolio while pioneering novel GenAI offerings, further strengthening its position at the forefront of the evolving APAC market.

Roadmap to Success: Customer-centric, Continuous, Proactive

NTT DATA's customer-centric approach goes beyond its extensive AI expertise and best-in-class capabilities, with delivering tangible customer value as a strategic imperative. Unlike competitors, the company builds on its extensive global presence, local expertise, and library of proprietary LLMs supporting diverse industries to tailor solutions to specific market needs.

Moreover, NTT DATA delivers exceptional customer value and excellent customer experiences by leveraging deep industry knowledge and business acumen to strategically guide clients in identifying high-impact GenAI applications. Its consultants provide comprehensive support, from selecting optimal models and architectures to fostering talent development and ensuring regulatory compliance and robust risk management. This approach empowers organizations to fully harness the transformative potential of GenAI, resulting in desired business benefits and a significant competitive advantage.

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>
> *- Sama Suwal*
> *Best Practices Research Analyst*

Furthermore, NTT DATA leverages its robust internal enablement initiatives, exemplified by the Global GenAI Academy and the upskilling of a significant portion of its APAC workforce as GenAI experts through various trainings, to not only address its own talent needs but also to provide a model and expertise for customers facing similar skilled labor shortages, especially in the APAC region. By fostering an AI-literate culture internally and embedding GenAI tools within its operations, NTT DATA demonstrates a proven approach

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[8] https://www.nttdata.com/global/en/news/press-release/2025/march/031100

that clients can emulate to democratize GenAI knowledge and cultivate the necessary skills to effectively adopt and implement AI solutions within their own organizations.

Overall, NTT DATA's transparent and seamless approach and close customer relationships position it as a preferred partner for organizations seeking impactful GenAI transformations. As a result, the company continues to expand its established client base across various industries, including automotive, energy and utilities, financial services, healthcare, insurance, manufacturing, public sector, retail, telecommunications, life services and pharmaceuticals, and transportation and logistics. Notably, NTT DATA serves 75% of the Fortune Global 100 companies in over 50 countries.

Specifically, NTT DATA is driving significant value for APAC customers across key sectors, particularly in financial services, healthcare, public sector, and manufacturing, by deploying GenAI solutions that address critical business challenges. In the financial sector, the company focuses on use cases such as fraud prevention, Know Your Customer compliance, and personalized service recommendations, while in manufacturing, the company enables product design, supply chain optimization, and knowledge management. NTT DATA's expertise is especially strong in mature markets like Singapore, Australia, and India, where the company is making inroads in the complex healthcare sector and the public sector.

At the same time, NTT DATA's sterling reputation and customer-centric framework continue to position it for strong financial growth in the APAC GenAI solutions space. In the third quarter of the fiscal year ending March 31, 2025, the company recorded net sales of ¥3,408 billion, a year-on-year increase of ¥231.6 billion. Similarly, NTT DATA increased its operating profit by ¥38.9 billion and quarterly profit by ¥12.7 billion for the same period.[9] This impressive growth momentum and trajectory are a testament to NTT DATA's customer-centric approach, end-to-end solutions portfolio, and ongoing innovation capabilities, earning its clients trust and loyalty and enabling it to capture more market share.

Frost & Sullivan believes the company is well-positioned to drive the APAC GenAI solutions space into its next growth phase, capturing market share and sustaining its leadership in the coming years.

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[9] https://www.nttdata.com/global/en/-/media/nttdataglobal/1_files/investors/financial-results/2024/fy2024_fs_3q.pdf?rev=5572ff5c72154440b622642a46ddd0fd

Conclusion

Frost & Sullivan believes that innovation and growth opportunities drive future success; many factors contribute, yet having a competitive strategy is critical. NTT DATA understands this core concept and is leading the generative artificial intelligence (GenAI) solutions market due to its focused strategies, helping it outpace competitors.

NTT DATA approaches GenAI implementations with a focus on large-scale production and long-term business value, emphasizing the need to move beyond isolated use cases and ensure organizational readiness for widespread adoption. The company offers comprehensive, end-to-end GenAI solutions supported by full-stack capabilities to enable a cohesive technological landscape that facilitates its customers' desired business outcomes. This holistic approach uniquely encompasses everything from business operations support to new business value creation, focusing on strategy and governance, tools and technology, and transformation journeys.

Moreover, NTT DATA's in-house research and development and collaborative innovation efforts empower the company to actively integrate GenAI capabilities into its existing solutions portfolio while simultaneously pioneering novel GenAI offerings, further strengthening its position at the forefront of the evolving APAC market. Overall, the company develops and implements its strategies with its customers in mind, securing its position as a trusted partner and market leader.

With its strong overall performance, NTT DATA earns Frost & Sullivan's 2025 Asia Pacific Competitive Strategy Leadership Recognition in the generative AI solutions industry.

What You Need to Know about the Competitive Strategy Leadership Recognition

Frost & Sullivan's Competitive Strategy Leadership 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 Competitive Strategy Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Strategy Innovation

Strategy Effectiveness: Effective strategy balances short-term performance needs with long-term aspirations and overall company vision

Strategy Execution: Company strategy utilizes best practices to support consistent and efficient processes

Competitive Differentiation: Solutions or products articulate and display unique competitive advantages

Executive Team Alignment: Executive team focuses on staying ahead of key competitors via a unified execution of its organization's mission, vision, and strategy

Stakeholder Integration: Company strategy reflects the needs or circumstances of all industry stakeholders, including competitors, customers, investors, and employees

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 fuelled 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)