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PRODUCT LEADER

*Advancing the Product Portfolio to Match
the Full Range of Customer Needs*

*RECOGNIZED FOR BEST PRACTICES IN THE
GLOBAL SATELLITE OSS/BSS INDUSTRY*

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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. Netcracker Technology excels in many of the criteria in the global satellite OSS/BSS space.

| RECOGNITION CRITERIA | |
|------------------------|------------------------------|
| Business Impact | Product Portfolio Attributes |
| Financial Performance | Match to Needs |
| Customer Acquisition | Reliability and Quality |
| Operational Efficiency | Product/Service Value |
| Growth Potential | Positioning |
| Human Capital | Design |

Match to Needs

Headquartered in the United States, Netcracker Technology is a wholly owned subsidiary of NEC, which is a global technology solutions provider with decades of expertise in satellite system engineering. NEC offers software-defined radios, radio frequency (RF) subsystems, and space-qualified onboard computing

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Mei Lee Quah
Senior Director, ICT Research

capabilities for low Earth orbit (LEO) and geostationary orbit (GEO) non-terrestrial network (NTN) constellations. Together with Netcracker Technology’s software solutions and 15 years of satellite experience, both companies offer integrated solutions for satellite communications. Netcracker Technology's expertise in end-to-end service orchestration and automation helps NEC deliver streamlined solutions for satellite operators.

Synergies between NEC and Netcracker Technology enable high-throughput, low-latency communications that are crucial for NTN applications, such as mobile connection, IoT backhaul, and internet access, serving as a strong competitive advantage in the satellite industry.

NEC and Netcracker Technology’s solutions are designed to support the growing demands of 5G and cloud technologies in the satellite industry. They offer solutions that leverage network slicing and multi-access edge computing (MEC) capabilities with options for deploying their solutions across multiple cloud

environments, thereby offering flexibility to satellite operators. Both companies have collaborated on multi-vendor solution projects. For example, they have partnered with Juniper Networks on projects that include 5G transport as part of the scope and with AWS on projects that orchestrate cloud-native 5G core services.

Reliability and Quality

Leading a new phase of growth in the NTN market, Netcracker Technology overcomes the complexity associated with the dynamic and multi-domain environment with its cloud-native Digital Satellite Solution. Launched in 2024, the Digital Satellite Solution is designed to help satellite operators automate operations, dynamically manage service topology, and track multiple Service Level Agreements (SLAs) and MEF (formerly the Metro Ethernet Forum) KPIs across coverage zones using artificial intelligence (AI)-driven service and resource inventories. The solution also features closed-loop assurance and multi-domain service orchestration for full lifecycle management. Acknowledged for its creative innovation by Frost & Sullivan and other industry participants, the Digital Satellite Solution leverages AI and automation to deliver a real-time operations environment that can monetize a diverse and global customer base with seamless service delivery and integration, which is vital for hybrid connectivity models and global service coverage.

Netcracker Technology enables real-time service topology and resource inventory using AI, which is crucial for managing dynamic satellite constellations, especially LEO constellations that orbit the Earth every 90 minutes. The solution enables flexible monetization and digital engagement through a business support system (BSS) stack with capabilities such as configure, price, and quote (CPQ), omnichannel digital engagement, unified product catalog, and flexible billing and partner management.

Embedded AI ensures dynamic SLA management and AI-driven service assurance, helping CSPs maintain optimal service quality across both satellite and terrestrial networks at all times. This makes it easier and faster for customers to deploy these solutions and commercialize services that can conform to strict multi-zone SLAs in real-time. Cloud-native and API-first architecture supports scalability and agility, and multi-domain orchestration integrates terrestrial mobile networks (e.g., 4G and 5G) and fixed networks (e.g., fiber) to enable end-to-end service orchestration across domains. Most importantly, built-in security practices in all parts of the solution protect sensitive customer data and prevent unauthorized access.

Product/Service Value

Netcracker Technology offers several advantages for startups in the satellite industry, helping them overcome barriers to entry such as limited resources, complex operations, and time-to-market. With cloud-native, scalable architecture, startups can deploy solutions without the usual heavy upfront infrastructure investments and scale as the business grows. AI-driven automation automates service provisioning, assurance, and fault management to help startups maintain high service quality with lean teams. Further, with flexible monetization tools and end-to-end service orchestration capabilities, startups can experiment with innovative business models (e.g., pay-as-you-go, network as a service [NaaS]) to cater to new markets and expand their value proposition with access to terrestrial mobile networks (4G and/or 5G), IoT platforms, and cloud services.

Pre-integrated modules and templates facilitate faster product iterations, leading to quicker service launches. With AI, analytics, and orchestration tools, startups can differentiate themselves from competitors through better performance with predictive maintenance, dynamic SLA management, and real-time topology updates.

Positioning

Netcracker Technology is considered a strong and growing brand in the satellite industry, particularly in the domain of digital transformation, AI-driven operations, and service monetization for satellite operators. Known for technical depth, reliability, and innovation, the company is trusted by both established satellite operators and startups. Its cloud-native, modular architecture appeals to a wide range of customers—from agile startups to global enterprises. It leads the industry in satellite specialization, innovation, and ecosystem integration, making it a top choice for satellite operators seeking advanced, scalable, and hybrid satellite solutions.

“Netcracker Technology has strong growth potential in the satellite industry, driven by its advanced technology stack, strategic positioning, and alignment with market trends.”

– Mei Lee Quah
Senior Director, ICT Research

The company stands out in the satellite industry for its AI-driven, cloud-native OSS/BSS platform tailored to the complexities of multi-orbit satellite networks. Strengths of the platform include real-time service topology and AI-driven SLA management for LEO/MEO/GEO networks, as well as the integration of OSS/BSS, orchestration, and monetization in a single platform. A particular differentiator for the company is

its dynamic inventory and topology management, which adapts to fast-moving LEO constellations.

Its Digital Satellite Solution has been acknowledged as the “Most Innovative Automation Product” by Telecom Review and has won the Gold Stevie Award in the Telecommunications Product category at the 21st Annual International Business Awards Program. These awards are a testament to the Digital Satellite Solution's disruptive nature and potential to transform the satellite industry. It also validates the effectiveness of the solution, particularly the use of AI and automation in real-world deployments. These awards build credibility and trust, making customer acquisition easier.

Customer Acquisition

Netcracker Technology's flagship Digital OSS/BSS solution is leading the way in successful digital transformation execution. In the satellite industry, the company serves several prominent customers, particularly those operating LEO and GEO networks such as Telesat, JSAT, and Viasat. It works closely with companies to test new concepts and jointly drive innovation and market disruption to revolutionize the broadband industry. Its Digital Satellite Solution supports companies in direct-to-device (D2D) and internet of things (IoT) satellite services, including CSPs integrating LEO/MEO/GEO networks with terrestrial infrastructure; companies targeting underserved regions with flexible monetization model; businesses supporting mobility use cases such as within aviation and maritime industries; and those offering premium services with real-time assurance.

Netcracker Technology is helping satellite operators transition from niche services to mass-market offerings. It lowers the barriers to entry for new market players and accelerates time-to-market. The

company's customer success stories reflect its ability to deliver scalable, AI-driven, cloud-native platforms that empower satellite operators to innovate, monetize, and grow.

Within Telesat's Lightspeed LEO constellation, the world's most advanced LEO satellite network, Netcracker Technology provides the cloud-native Digital OSS/BSS suite as a full stack solution and an AI-enabled inventory and topology system to manage dynamic connectivity and service quality. Launched to deliver high-capacity, low-latency broadband to the enterprise and government segments globally, Telesat's Lightspeed leveraged Netcracker Technology's solution to manage the highly dynamic, multi-orbit network with real-time service demands and complex customer requirements. Telesat was able to rapidly launch and scale services across global markets. The solution delivered a differentiated, enterprise-grade experience with high availability and performance guarantees, positioning Telesat as a disruptive force in the global satellite broadband market and a leader in next-generation satellite connectivity. Netcracker Technology's AI and data analytics platform provided predictive insights, anomaly detection, and optimization across operations, which enabled smarter decision-making and improved network resilience.

Growth Potential

The need for dependable internet connectivity, particularly direct connectivity to mobile and IoT devices, in underserved and remote areas is growing. Wider adoption of solutions to bridge the digital divide and support mission-critical communications is necessary. The global satellite industry is projected to grow 7x in size over the next decade, fueled by increased satellite launches, demand for global connectivity, and competition for spectrum. Netcracker Technology has strong growth potential in the satellite industry, driven by its advanced technology stack, strategic positioning, and alignment with market trends.

There is ample opportunity for the company to support satellite operators with scalable, AI-driven platforms. The company's strategy for delivering exceptional customer value and driving higher customer acquisition in the satellite industry is built around its AI-driven real-time operations support, conditional SLA and monetization innovation, cloud-native and scalable architecture, and strategic partnerships.

Conclusion

Together with NEC, Netcracker Technology offers integrated solutions for satellite communications. Leveraging each other's strengths as a competitive advantage in the satellite industry has positioned the company as a strong and growing brand. The company's industry-recognized Digital Satellite Solution and increasing trust among customers will help it tap into growth opportunities within the satellite industry.

With its strong overall performance, Netcracker Technology earns Frost & Sullivan's 2025 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 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 Product Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

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

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

