NETSCOUT®

2025 COMPANY OF THE YEAR

Driving impact across the customer value chain

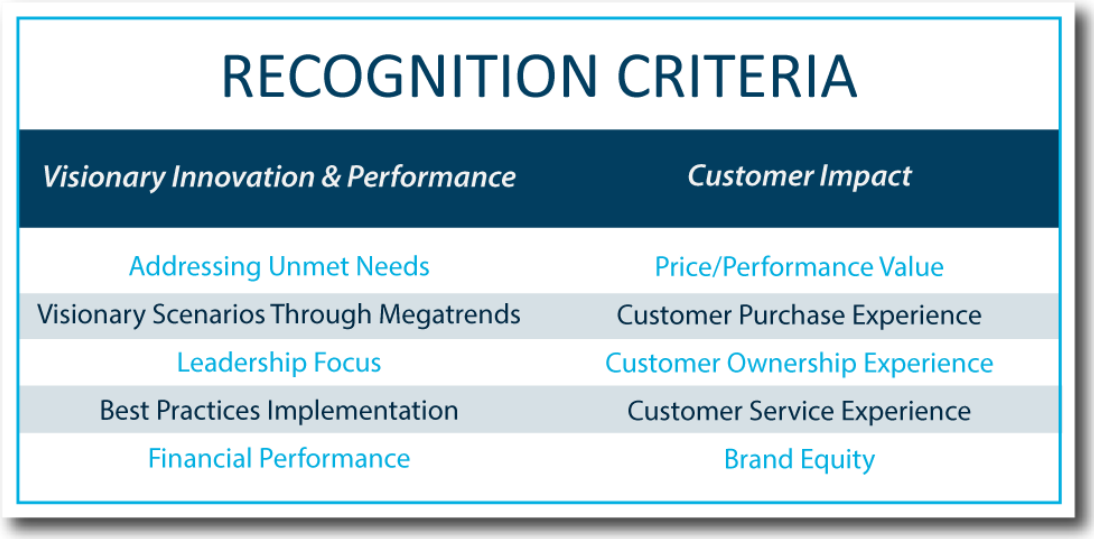
RECOGNIZED FOR BEST PRACTICES IN THE GLOBAL NETWORK MONITORING INDUSTRY

FROST & SULLIVAN

Table of Contents

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. NETSCOUT excels in many of the criteria in the network monitoring space.



Network Monitoring: Performance, Reliability, and Resilience in the Digital Economy

The global network monitoring market is undergoing a period of profound transformation, reflecting the escalating complexity of modern information technology (IT) ecosystems and the indispensable role of digital connectivity in business operations. As organizations increasingly rely on intricate webs of cloud, edge, and on-premise environments to support critical functions, maintaining continuous visibility across networks and applications becomes a strategic imperative. Network monitoring solutions (encompassing network performance monitoring solutions and application performance monitoring solutions) serve as the foundational enablers of this visibility, ensuring reliability, performance, and security in an era defined by data-driven decision-making and uninterrupted service delivery.

The market's evolution is closely tied to the accelerating pace of digital transformation and the redefinition of enterprise network boundaries. The post-pandemic surge in hybrid and remote work models expanded the perimeter of organizational networks, demanding more advanced tools for proactive management and troubleshooting. Enterprises across various sectors are investing in intelligent monitoring platforms that can correlate performance metrics, identify bottlenecks, and predict failures before they impact user experience or operational continuity. As networks underpin essential services (from financial transactions and telemedicine to industrial automation and public safety), performance assurance becomes synonymous with business resilience.

The growing dependence on network and application monitoring, however, is not uniformly distributed across all market segments. While large enterprises and telecommunications providers are leading

adopters, leveraging advanced analytics and automation for real-time visibility, small and medium-sized businesses remain more cautious in their investments. Economic uncertainties have tempered IT spending among smaller organizations, which often lack the resources or perceived urgency to deploy comprehensive monitoring frameworks. Nevertheless, the market's long-term trajectory remains strong, supported by the convergence of cloud computing, artificial intelligence (AI), and predictive analytics that continue to redefine performance management's delivery and scale.

Regionally, North America remains the epicenter of innovation and adoption. The region's mature digital infrastructure, robust enterprise IT spending, and presence of leading technology vendors foster an ecosystem conducive to sustained growth, with an expected compound annual growth rate (CAGR) of 8.9% through 2026.[1] Europe, while more fragmented in regulatory and adoption terms, maintains a solid 25% market share, reflecting ongoing modernization efforts and a growing emphasis on data sovereignty and cybersecurity.[2] The Asia-Pacific region, by contrast, is emerging as the market's growth engine, projected to expand at a CAGR of 10.3%[3]—driven by fifth-generation (5G) deployments, rapid digitalization, and the rise of hyperscale data centers across major economies such as China, India, and Japan. In contrast, the rest of the world, though accounting for a smaller portion of total revenue, represents an important frontier for future expansion as connectivity infrastructure and investment capacity mature.

Ultimately, the network monitoring market is positioned at the intersection of technological sophistication and operational necessity. Its evolution is being shaped by the pressures of ensuring flawless digital experiences, reducing risks and managing escalating system complexity within constrained budgets. Frost & Sullivan concludes that vendors that succeed in combining deep visibility with automation, scalability, and cost efficiency will enable the next generation of intelligent, self-healing networks that underpin the global digital economy.

A Trailblazer's Path

NETSCOUT Systems, Inc. (NETSCOUT) is a global leader in real-time visibility, performance assurance, and cybersecurity solutions that empower the world's most essential organizations to thrive in an increasingly connected and complex digital landscape. With a legacy of innovation spanning more than three decades, the company's mission is to serve as the "Guardian of the Connected World" by providing the data and intelligence needed to ensure the continuity, safety, and reliability of global digital infrastructures. Through its patented Adaptive Service Intelligence (ASI) technology and industry-defining Visibility Without Borders® strategy, NETSCOUT transforms packet data into Smart Data. This actionable, AI-ready intelligence enables proactive observability, rapid troubleshooting, and precise threat detection and investigation across hybrid cloud, 5G, and enterprise environments. This pervasive visibility helps enterprises, service providers, and public institutions make better, smarter decisions, faster - ensuring uninterrupted services and exceptional digital experiences for billions of users globally.

[1] "Global Wireless Network Test Equipment Growth Opportunities", Frost & Sullivan, January 2022

[2] Ibid.

[3] Ibid.

Trusted by 90% of the Fortune 100, Tier 1 service providers, and leading financial and cloud hosting institutions, NETSCOUT has earned its reputation as the definitive source of truth for digital performance and resilience.[4] Its unified approach to observability and cybersecurity allows organizations to seamlessly detect, investigate, and resolve issues in real time, bridging traditional silos between IT, network operations (NetOps), AI operations (AIOps), and security operations (SecOps). Through continuous innovation, deep industry expertise, and enduring customer partnerships, the company helps shape the future of connected intelligence. Frost & Sullivan applauds NETSCOUT's continued market leadership and extensive industry tenure as it safeguards the performance, security, and reliability of the world's digital ecosystems.

Where Foresight Meets Execution: NETSCOUT's Blueprint for Market Leadership

NETSCOUT's enduring value proposition is rooted in its mastery of packet-based intelligence and its ability to turn raw network data into precise, actionable insight that empowers organizations to deliver consistent performance, security, and user experience across the most complex digital ecosystems. This foundation, built on decades of innovation in deep packet inspection (DPI) and refined through its nGeniusONE and Omnis platforms, sets the company apart in a market where visibility has become an operational necessity and a competitive differentiator. By combining DPI with its patented ASI technology, NETSCOUT enables customers to see every interaction across hybrid, multi-cloud, and on-premise environments, capturing the "truth" of user and application activity at a level of granularity few competitors can match.

At the heart of this differentiation is NETSCOUT's conviction that the packet remains the most reliable and complete source of truth. While many observability and performance vendors rely on sampled, logs or synthetic data, the company collects and analyzes real network traffic, generating AI-ready "Smart Data" that feeds its platforms and third-party observability or security ecosystems. This approach directly addresses a persistent market gap: the lack of trustworthy, contextualized visibility across distributed infrastructures that provides certainty. Traditional monitoring solutions often forced IT and NetOps teams to choose between completeness and cost efficiency. These tools collect "everything", only to drown in irrelevant data, or they filter too aggressively and lose important context. In contrast, NETSCOUT's architecture leverages what it calls "optimal viable telemetry," which delivers the precise data required for a given use case without compromising depth or performance. This balance enables organizations to gain complete situational awareness while optimizing storage, processing, and cost.

The company's DPI-enhanced Metadata, Events, Logs, and Telemetry (MELT) further amplifies this value by bridging the gap between surface-level observability and true causality. While traditional MELT data can highlight that a problem exists, NETSCOUT's DPI-derived insights reveal "why" it exists. They pinpoint the root causes of performance degradation, latency, or security threats by decoding actual payload traffic. This capability allows IT operations, AIOps, and cybersecurity teams to move beyond detection and into decisive, informed action. In highly distributed industries such as healthcare, manufacturing, and financial services (where downtime translates directly into financial loss or safety risks), the company's ability to reduce mean time to knowledge and mean time to resolution (MTTR) proves transformative. As

[4] https://www.netscout.com/company

described by company leaders, customers often cut incident resolution from days to minutes upon deployment, reclaiming operational stability, trust, and productivity.

NETSCOUT's technological evolution reflects a consistent commitment to innovation anchored in practical customer outcomes. Over its 40-year history, the company has progressed from reactive network analysis to proactive performance assurance and then to predictive observability. This journey parallels the increasing sophistication of its clients' needs: from restoring services post-incident to anticipating potential disruptions before they occur. The integration of AI and machine learning (ML) into its nGenius and Omnis platforms epitomizes this shift. By feeding real-time, DPI-enriched data into AI/ML engines, NETSCOUT empowers predictive management, automated triage, and guided workflows. Its ongoing development of large language models represents the next frontier in human-AI collaboration for IT operations, enabling teams to interact with complex datasets conversationally, derive contextual insights, and execute corrective actions without relying on static dashboards or manual correlation.

Leadership focus and organizational discipline are pivotal in translating these innovations into sustained market impact. Under a hands-on executive philosophy (symbolized by the CEO's "5% rule," emphasizing direct strategic engagement), NETSCOUT maintains deep proximity to customer challenges. Executives and engineers alike engage continuously with clients to anticipate emerging requirements and shape product evolution accordingly. This approach ensures that the company's roadmap remains tightly aligned with real-world complexity, from supporting 5G rollouts alongside major network equipment manufacturers to integrating seamlessly with evolving AIOps and cybersecurity ecosystems. The company's leadership also invests heavily in megatrend analysis, synthesizing insights from analysts, customers, and internal research and development teams to steer innovation toward the most impactful domains: hybrid cloud visibility, edge intelligence, AI observability, and cyber resilience.

NETSCOUT's ability to unite observability and cybersecurity within a single architectural framework is another defining strength. Both domains leverage the same foundational DPI instrumentation—deployed across data centers, public clouds, and remote environments—to extract packet-level intelligence. This shared core enables customers to view the same data through different analytical lenses: performance assurance on one side, threat detection, investigation and response on the other. Considering the increasing overlap of cyber incidents and service disruptions, this convergence delivers exceptional value. The company's Omnis Cyber Intelligence platform, for instance, builds upon the same packet-capture infrastructure used for service assurance, adding analytics that expose anomalies, behavioral deviations, and potential intrusions. This dual use of a unified data layer allows organizations to detect, investigate, and mitigate threats faster. It bridges the critical gap between detection and response with what NETSCOUT calls reduced "mean time to knowledge."

Perhaps NETSCOUT's most distinctive competitive differentiator, however, is its concept of "Visibility Without Borders." This philosophy encapsulates the company's capacity to provide end-to-end, cross-domain insight across any network topology: enterprise, service provider, or government. Through scalable instrumentation that adapts to physical, virtual, and containerized environments, NETSCOUT gives organizations "eyes and ears" in every corner of their operations, including remote or resource-constrained sites where conventional tools cannot reach. Customers in sectors like healthcare and

manufacturing rely on this capability to maintain uptime and compliance even in decentralized or hybrid settings, underscoring the company's ability to democratize observability across the enterprise.

In sum, NETSCOUT's differentiation lies in its unwavering focus on data integrity, cross-domain adaptability, and customer-centric innovation. By transforming packet data into a universal language for performance and security, the company bridges historical silos between IT, NetOps, and SecOps, enabling organizations to operate with confidence in an increasingly unpredictable digital landscape. Through this blend of visionary leadership, disciplined execution, and technical authenticity, NETSCOUT continues to define the benchmark for intelligent, resilient, and borderless visibility in the network monitoring market.

Where Value Meets Trust: NETSCOUT's Formula for Long-Term Customer Loyalty

NETSCOUT delivers exceptional price-to-performance value through a unique blend of architectural efficiency, technical breadth, and flexible licensing models that align with the evolving financial and operational needs of its customers. Its pricing strategy is rooted in fairness, scalability, and transparency, enabling organizations to achieve enterprise-grade observability and cybersecurity without unnecessary complexity or inflated costs. Customers can choose between perpetual and subscription licenses, both of which support a "pay-as-you-grow" model that allows them to expand coverage and functionality in line with their business growth. This flexibility enables organizations of all sizes to scale intelligently and sustainably.

At the core of NETSCOUT's value proposition is its distributed architecture, designed to perform analytics at the source of packet capture rather than relying on expensive, centralized middleware. By generating DPI-based Smart Data locally and minimizing the volume of data ingested into observability platforms, the company lowers infrastructure costs and energy consumption. It delivers a greener and more cost-efficient alternative to monolithic competitors. This architecture allows customers to gain complete visibility without paying for redundant processing or excessive data transfer. In contrast to other vendors that limit monitoring capabilities or charge per-application fees, NETSCOUT's nGeniusONE, Omnis Cyber Intelligence consoles along with respective InfiniStreamNG and CyberStream network probes provide support for more than 3,000 applications, protocols, and well-known services out of the box, at no additional cost.[5] These include critical industry standards, including Health Level Seven in healthcare, International Organization for Standardization 8583 in financial transactions, Financial Information eXchange and OUCH (Order Unconfirmed Cancel Handler) protocols in capital markets, and Supervisory Control and Data Acquisition and Generic Object Oriented Substation Event systems in utilities and manufacturing, demonstrating the company's depth across verticals. Customers can also easily configure support for custom or emerging applications, reinforcing NETSCOUT's commitment to openness and adaptability.

[5] Interview with Frost & Sullivan, October 2025

Another key component of NETSCOUT's value equation lies in its ability to deliver multi-purpose functionality from a single deployment. The same infrastructure used for service assurance can seamlessly extend to cybersecurity applications through software-based add-ons, dramatically lowering the total cost of ownership. For example, customers who already deploy InfiniStreamNG network probes for network monitoring can use those same probes to enable advanced threat detection and incident response capabilities via the Omnis Cyber Intelligence platform, effectively uniting NetOps and SecOps around a shared source of packet-based truth. This integration reduces tool sprawl, eliminates redundant investments, and simplifies operations. It allows teams to collaborate efficiently while maintaining high levels of performance, resilience, and protection. By converging observability and security into a unified data framework, NETSCOUT ensures customers gain unmatched operational agility and insight at an optimal price-to-performance ratio.

NETSCOUT's commitment to customer experience is reflected in its philosophy of "delighting the customer" throughout the entire engagement lifecycle: from initial deployment to long-term optimization. The company's global MasterCare program provides 24/7 technical support through nine world-class assistance centers, ensuring rapid response and comprehensive coverage. Unlike many vendors that restrict maintenance updates to bug fixes, NETSCOUT's MasterCare includes feature-rich enhancements at no additional cost, ensuring customers continuously benefit from the latest innovations. The myNETSCOUT portal extends this support ecosystem by offering a dynamic hub of technical resources, deployment documentation, training videos, and access to software updates.

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- Debashrita Tripathy
Senior Consulting Analyst

For organizations seeking a deeper partnership, NETSCOUT offers "Premium Support Engineers": dedicated experts who work either on-site or remotely as extensions of a customer's IT team. These specialists ensure that the company's solutions have optimal configuration, excellent maintenance, and full alignment with evolving operational priorities. Additionally, its innovative Visibility as a Service offering delivers proactive, 24/7 oversight by NETSCOUT's own experts, effectively acting as an outsourced network operations team. This capability is especially valuable for customers in sectors such as healthcare and manufacturing, where continuous operations are essential but internal IT resources can be limited. Through early detection, intelligent triage, and collaborative problem resolution, the company's service model helps organizations maintain peak performance while reducing the burden on internal teams. The result is a consistently high level of customer satisfaction, reflected in long-term loyalty, strong retention rates, and sustained revenue growth across enterprise and service provider segments.

Case Study 1:

A global technology manufacturer, operating across more than 24 international development sites, faced a severe application performance issue that disrupted its product reliability and quality testing processes. The slowdown in a critical engineering application caused missed deadlines and production delays, threatening revenue and reputation. The company's complex, distributed IT environment (shaped by years of acquisitions) left its engineering division without adequate network visibility or on-site technical resources. As the issue persisted for weeks, traditional troubleshooting methods failed to pinpoint the root cause, forcing the IT team to escalate the situation to NETSCOUT for deeper analysis and resolution.

By deploying NETSCOUT's nGeniusONE® platform, InfiniStreamNG® (ISNG) appliances, and Remote ISNG units at key engineering sites, the company achieved end-to-end visibility into application traffic for the first time.[6] DPI and real-time analytics quickly revealed that excessive microbursts within the Citrix ICA virtual desktop interface were creating congestion and latency issues. With this insight, IT teams resolved the month-long disruption in under two hours (avoiding costly downtime and production delays). The solution restored system reliability and established a proactive framework for monitoring application interdependencies, ensuring continuous performance optimization across global locations. As a result, the manufacturer strengthened operational resilience, improved user experience, and reinforced its reputation for innovation and efficiency.

Case Study 2:

A major European-based global financial institution, serving millions of retail and institutional customers across Latin America and Europe, faced growing cybersecurity challenges as it migrated critical workloads to the Amazon Web Services (AWS) cloud. The bank struggled with limited visibility into its hybrid and multi-cloud environments, inefficient detection of advanced threats, and complex compliance obligations under strict financial regulations. Its fragmented ecosystem (composed of multiple vendors and legacy tools) further hampered threat correlation, slowed investigations, and increased operational costs. The organization turned to NETSCOUT's Omnis™ CyberStream and Omnis™ Cyber Intelligence (OCI) for a unified, cloud-ready solution capable of delivering real-time visibility, rapid detection, and regulatory compliance support to regain control over its security landscape.

By deploying Omnis CyberStream and Cyber Intelligence , the bank gained full packet-level visibility across AWS and on-premises environments, enabling precise monitoring of network activity and user behavior. The solution's advanced threat analytics leveraged behavioral modeling, indicators of compromise, and policy compliance checks to improve identification accuracy of known and unknown threats while reducing false positives. Continuous packet capture and long-term metadata storage facilitated historical investigations and reduced MTTR by more than 50%.[7] The integration of NETSCOUT's security platform with existing tools streamlined security operations, decreased vendor dependency, and delivered measurable cost savings. As a result, the bank strengthened its cybersecurity posture, enhanced compliance through detailed policy mapping and MITRE Adversarial Tactics, Techniques, and Common

[6] https://www.netscout.com/resources/case-studies/global-manufacturer-resolves-a-weeks-long-application-disruption-in-under-two-hours

[7] https://www.netscout.com/resources/case-studies/enhancing-cloud-security-for-retail-bank-with-omnis-cyber-intelligence-oci-in-an-aws-environment

Knowledge alignment, and established a scalable, proactive defense framework for its growing digital ecosystem, ensuring robust protection of sensitive customer data and business continuity in the cloud.

Strategic partnerships play a vital role in reinforcing NETSCOUT's brand presence and technological reach. Collaborations with industry leaders such as Cisco/Splunk, ServiceNow, AWS, Microsoft Azure, Google Cloud, and Palo Alto Networks ensure seamless integration with the ecosystems that power today's digital enterprises. This interoperability enhances the company's visibility footprint, enabling customers to leverage NETSCOUT Smart Data within their existing observability, AIOps, and cybersecurity workflows. As organizations accelerate automation and AI adoption, NETSCOUT's data becomes indispensable—curated, contextual, and "AI-ready," providing the precision and completeness required to drive intelligent decision-making.

Through this combination of architectural integrity, relentless customer focus, and visionary brand strategy, NETSCOUT solidifies its reputation as a trusted guardian of the connected world. Its ability to deliver sustainable performance at scale, backed by exceptional service and a globally recognized brand, underscores its leadership in a market increasingly defined by complexity and interdependence.

Frost & Sullivan recognizes and applauds NETSCOUT's continued market leadership, customer-centric innovation, and enduring commitment to excellence in delivering unparalleled value to the world's most essential organizations.

Conclusion

The global network monitoring market struggles with fragmented visibility, limited data fidelity, and inefficient cross-domain collaboration between information technologies, network operations, and security operations teams.

NETSCOUT properly addresses these unmet needs through its mastery of packet-based intelligence and patented Adaptive Service Intelligence technology, transforming raw network data into precise, actionable insight that ensures consistent performance, security, and user experience across even the most complex hybrid and multi-cloud ecosystems. Overall, the company tackles these challenges through strong leadership that combines customer-focused innovation with disciplined execution, exemplified by its "Visibility Without Borders®" approach and the unification of observability and cybersecurity within a single data architecture. Frost & Sullivan appreciates how NETSCOUT remains a trusted partner and global benchmark for intelligent, resilient, and borderless visibility across the digital infrastructure landscape.

With its strong overall performance, NETSCOUT earns the 2025 Frost & Sullivan Global Company of the Year Recognition.

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 mega trends 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

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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)