FROST & SULLIVAN
BEST PRACTICES

2026
ASIA-PACIFIC NETWORK VISIBILITY PLATFORMS
COMPANY OF THE YEAR

KEYSIGHT

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. Keysight Technologies excels in many of the criteria in the network visibility space.

RECOGNITION CRITERIA

Visionary Innovation & Performance	*Customer Impact*
Addressing Unmet Needs	Price/Performance Value
Visionary Scenarios Through Megatrends	Customer Purchase Experience
Leadership Focus	Customer Ownership Experience
Best Practices Implementation	Customer Service Experience
Financial Performance	Brand Equity

Accelerating Transformation in APAC: Redefining Network Visibility for a New Digital Era

The Asia-Pacific (APAC) region is undergoing a significant transformation in its network visibility landscape, driven by the convergence of advanced technologies and increasing cybersecurity demands. The rapid adoption of 5G, 6G on the horizon, the Internet of Things (IoT), cloud-native architectures, and artificial intelligence (AI)/machine learning are adding substantial complexity to modern networks and placing greater pressure on traditional monitoring and security approaches.

To meet heightened expectations around network performance and security, organizations across the region—from established telecommunications providers in countries such as India and Japan to rapidly growing digital economies across Southeast Asia—are investing in advanced visibility solutions. These platforms must deliver end-to-end, granular, real-time telemetry across any environment to support scalability, resilience, and compliance.

As networks become more distributed and encrypted, organizations face mounting challenges in maintaining visibility into network traffic. Evolving end-to-end encryption standards, ephemeral keys, and containerized workloads introduce significant operational hurdles, making decryption and traffic correlation indispensable for threat detection and troubleshooting. At the same time, APAC's cost-sensitive markets and heterogeneous maturity levels create friction for vendors offering high-performance visibility solutions. As a result, customers across the region seek modular, scalable architectures that minimize upfront investment while delivering pay-as-you-grow flexibility. Yet, gaps persist: many enterprises lack awareness of advanced visibility capabilities, and smaller organizations struggle to justify the return on investment for large network visibility deployments. These unmet needs underscore the importance of customer awareness, simplified deployment, and integrated solutions that consolidate multiple functions, such as advanced filtering, packet deduplication, application intelligence, and traffic decryption into a single platform.

Within this context, success for network visibility vendors will hinge on three key imperatives: innovation, ecosystem collaboration, and customer-centricity. First, solution providers must anticipate emerging requirements, from AI traffic monitoring to cloud-native visibility, while ensuring wire-speed performance and zero packet loss. Second, forging deep partnerships with technology providers is vital to deliver integrated, multi-vendor solutions that reduce complexity and cost for customers. Lastly, vendors must align pricing models, support structures, and operational practices with regional realities by offering flexible licensing, localized service, and high-touch engagement to build trust and loyalty.

In essence, companies that combine technical excellence with adaptability and collaborative innovation will not only address today's visibility challenges but also shape the future of secure, intelligent networking across the APAC market.

Keysight Technologies: Redefining Network Visibility

Among the companies rising to meet today's escalating network complexity, Keysight Technologies (Keysight) stands out as a global leader in electronic design, test, and optimization solutions that empower enterprises, service providers, and governments to innovate faster and secure increasingly complex networks. This leadership is rooted in more than eight decades of measurement science expertise, inherited from its Hewlett-Packard origins, establishing the company as a trusted partner for organizations seeking reliability, precision, and engineering excellence.

> *"Unlike generic, one-size-fits-all packet brokers, Keysight offers purpose-built hardware for distinct verticals like Vision X for telcos managing massive traffic volumes, Vision Edge 1S for operational technology (OT) networks operating in industrial environments, and TradeVision for high-frequency trading markets where nanoseconds define competitive advantage. This vertical-specific strategy ensures customers receive solutions optimized for their operational realities, whether enabling lawful interception for telecommunications operators in India or embedding third-party sensors into OT environments across manufacturing, energy, and utilities."*
>
> ***- Sujan Sami***
> ***Senior Research Director***

Over the years, as customer environments became more distributed, cloud-centric, and security-sensitive, Keysight expanded its focus from design simulation and validation to full lifecycle network security and performance optimization. This evolution accelerated significantly with the strategic acquisition of Ixia in 2017,[1] a pivotal move that extended the company's reach beyond traditional test and measurement into cybersecurity, traffic intelligence, and network visibility. By integrating these capabilities across physical, virtual, and cloud environments, Keysight's unified platform enables organizations to maintain performance, strengthen security posture, and navigate the operational complexity of modern digital ecosystems.

Keysight's network visibility portfolio is at the heart of this offering, designed to deliver better visibility into physical, virtual, and software-defined networks. The

[1] https://investor.keysight.com/investor-news-and-events/financial-press-releases/press-release-details/2017/Keysight-Technologies-Announces-Closing-of-Acquisition-of-Ixia/default.aspx

portfolio includes network packet brokers (NPBs), bypass switches, network taps, private and public cloud visibility solutions, and centralized visibility management tools, all working together to capture, aggregate, filter and optimize network packet traffic before sending it to downstream monitoring, security and other analytics solutions. These network visibility solutions provide dynamic network intelligence (i.e., rich insights into traffic, applications, and users across any environment), helping organizations continuously innovate, meet aggressive service level agreements, and keep applications running smoothly and securely. Overall, Keysight's visibility tools deploy seamlessly across on-premise data centers, cloud-based hypervisors, and software-as-a-service environments, ensuring end-to-end monitoring and control.

Building on this foundation, Keysight delivers a differentiated approach tailored to the APAC region's unique challenges. Unlike generic, one-size-fits-all packet brokers, the company offers purpose-built hardware for distinct verticals like Vision X for telcos managing massive traffic volumes, Vision Edge 1S for operational technology (OT) networks operating in industrial environments, and TradeVision for high-frequency trading markets where nanoseconds define competitive advantage. This vertical-specific strategy ensures customers receive solutions optimized for their operational realities, whether enabling lawful interception for telecommunications operators in India or embedding third-party sensors into OT environments across manufacturing, energy, and utilities.

Keysight enhances this differentiation with advanced capabilities such as traffic decryption, line-rate traffic deduplication, network metadata and application intelligence, all integrated into a high-performance platform that reduces complexity and delivers actionable insights. Its packet brokers handle massive traffic volumes at wire speed by combining advanced switch silicon, CPU-based processing and field-programmable gate array (FPGA)-based hardware acceleration. This powerful combination ensures zero packet loss, deep visibility into encrypted and cloud-native environments, and intelligent traffic processing, capabilities essential for APAC organizations facing challenges such as pervasive encryption, rapid cloud migration, and growing AI-driven workloads.

Beyond technology, Keysight addresses APAC's cost sensitivity and operational complexity with modular, scalable architectures and flexible licensing models that let customers start small and expand as their requirements grow. Moreover, the company's strategic partner network, including technology partners, amplifies the value of its visibility platform by enabling third-party sensor integration across security and network performance use cases. Together with these collaborators, Keysight delivers co-validated solutions that reduce infrastructure costs, simplify deployment, and accelerate time to value. This approach continues to drive wins with key customers in the APAC banking and finance, government, telecommunications, and transportation sectors, reflecting strong confidence in the combined strength of Keysight's platforms and its partner ecosystem.

By embedding intelligence at the core of its visibility platform and extending platform access to a robust partner network and seamless third-party sensor integration, Keysight ensures that customers across APAC can navigate the complexity of modern networks with confidence and agility.

Strengthening Competitive Differentiation: Integrating Innovation, Performance, and Ecosystem Leadership

Keysight's prominent position in the APAC network visibility market is not driven by technology alone, but by a holistic strategy that unites operational rigor, continuous innovation, and an open, collaborative ecosystem. This multi-pronged approach enables the company to consistently deliver advanced solutions while strengthening its competitive edge in a region marked by complexity, scale, and accelerated digital transformation.

Keysight complements this operational strength with its commitment to market-led innovation. Close engagement with enterprises, carriers, OT operators, and financial institutions across APAC ensures that its product roadmap aligns with real-world challenges. This customer-driven approach translates emerging needs into practical solutions that close visibility gaps in high-throughput and highly regulated environments. Examples include Keysight's CloudLens, a cloud-native, platform-agnostic solution delivering Visibility-as-a-Service for public, private, and hybrid clouds, and Keysight's industry-leading 400G packet broker portfolio and continued innovation beyond 400G, delivering scalable, high-performance, and lossless visibility for high-bandwidth networks. These innovations enable customers to maintain visibility across containerized workloads, hybrid cloud environments, and next-generation networks, ensuring resilience against evolving threats and operational complexity.

This market-led innovation philosophy also underpins Keysight's commitment to an open, partner-centric ecosystem, one that transforms network visibility into a unified, multi-vendor platform. Launched in January 2025, the Keysight Application Fusion program exemplifies this approach by integrating best-in-class third-party security and monitoring solutions directly into the company's packet brokers.[2] Partner integrations have been announced with Forescout, Armis, Instrumentix, and Nozomi Networks, enabling customers to consolidate multiple monitoring tools onto a single appliance. By embracing partner technologies rather than competing with them, Keysight expands the functional reach of its platform and strengthens its role within APAC's broader technology ecosystem, delivering flexible, end-to-end visibility architectures that scale with evolving customer requirements.

Together, these pillars of operational excellence, market-driven innovation, and ecosystem openness transform network visibility from a passive monitoring layer into a proactive, intelligence-driven capability. By combining high-speed data capture, modular scalability, and seamless integration with partner solutions, Keysight empowers enterprises and service providers to navigate complex hybrid networks, meet stringent regulatory mandates, and unlock actionable insights from telemetry. As a result, the company not only elevates customer outcomes but also solidifies its position as APAC's most differentiated and future-ready leader in network visibility.

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

Keysight's Customer-Centered Strategy: Delivering Consistent Value and Confidence

Keysight builds its success in the APAC region on a customer-first philosophy that prioritizes delivering measurable outcomes and long-term value for every

[2] https://www.keysight.com/us/en/about/newsroom/news-releases/2025/0109-pr25-022-keysight-launches-all-in-one-solution-for-network-visibility-and-security.html

engagement. The company maintains high-touch engagement with its most important customers, ensuring frequent interactions and proactive support so that every visibility deployment achieves its intended outcomes and delivers full value. This commitment is reinforced by a robust regional infrastructure that consolidates domain expertise and robust demo capabilities. This regional presence and commitment enable rapid proof-of-concept validation and solution optimization, ensuring customers experience consistent, high-quality results.

Around-the-clock technical assistance across multiple countries, complemented by local and remote professional services, ensures customers receive timely help wherever they operate. In select markets, Keysight partners with trusted distributors to deliver execution and maintain consistency in operational practices. The company backs this localized support with an APAC-optimized supply chain and repair-return services, reducing downtime and accelerating resolution.

Furthermore, Keysight's solutions themselves are engineered for reliability and performance, leveraging CPU, FPGA-based hardware acceleration and custom chips to deliver wire-speed processing and zero packet loss. Combined with strong partner and channel support, this technical foundation ensures that customers can scale visibility without compromising security or compliance.

Keysight transforms complex network visibility projects into seamless, high-value experiences by coupling operational excellence with advanced technology and ecosystem collaboration. Customers benefit from reduced operational complexity, faster incident response, and actionable insights that drive compliance and business outcomes. This unwavering focus on customer success positions Keysight not just as a vendor, but as a trusted partner delivering differentiated outcomes that few competitors in the APAC network visibility market can match.

Driving Growth and Brand Excellence in the APAC Network Visibility Market

Building on its customer-focused foundation, Keysight demonstrates a strong ability to translate insights into measurable outcomes, as reflected in its robust financial performance. In the second quarter of fiscal year 2026, the company reported a record $1.717 billion in revenue, representing 31% year-over-year (y/y) growth and exceeding the high end of its guidance range. This performance was supported by strong growth across business segments and key geographic regions. APAC remained a significant contributor, accounting for 43% of global revenue, with $746 million in revenue and an impressive 30% y/y increase.[3] This momentum underscores Keysight's strategic emphasis on the region, where investments in advanced solutions for AI-driven networks, cloud-native visibility, and defense modernization continue to align with regional priorities and fuel sustained growth.

This financial strength amplifies Keysight's brand positioning in the region. Through the integration of differentiated technology, thought leadership, and compelling customer implementations, the company positions its visibility solutions as the benchmark for performance and reliability. Its focus on delivering tangible customer value builds trust and long-term loyalty among APAC enterprises and service providers.

Through this dual emphasis on customer-centric innovation and operational excellence, Keysight sustains competitive differentiation while capturing new opportunities across telecommunications, financial

[3] https://s22.q4cdn.com/444849635/files/doc_earnings/2026/q2/presentation/Q2-26-Results-Presentation.pdf

services, OT, and cloud-native environments. This alignment of strategy, brand, and execution ensures the company remains a trusted, high-value partner in the region's evolving network visibility ecosystem.

Conclusion

The Asia-Pacific (APAC) region faces critical challenges as organizations grapple with encrypted traffic, hybrid architectures, and escalating security demands, driving an urgent need for high-performance visibility solutions that can handle traffic decryption, dynamic workloads, and rapidly evolving threat landscapes. Keysight Technologies (Keysight) addresses these requirements through a leadership approach that blends customer-centric strategies with best-practice implementation. These include the company's modular, scalable architectures that minimize upfront investment, flexible licensing models tailored to regional realities, and ecosystem-driven programs such as the Application Fusion Program, which consolidates monitoring and security functions to simplify operations and accelerate time-to-value.

Keysight's ability to anticipate emerging requirements, including artificial intelligence traffic monitoring and cloud-native visibility, while delivering wire-speed performance and zero packet loss through purpose-built hardware, further strengthens its differentiation. Coupled with strong regional presence and localized support, the company ensures consistent, high-quality outcomes across diverse APAC environments. This combination of innovation, operational rigor, and customer alignment positions Keysight as a trusted partner, earning a reputation for delivering the most comprehensive and reliable visibility solutions in the industry.

With its strong overall performance, Keysight Technologies earns Frost & Sullivan's 2026 Asia-Pacific Company of the Year Recognition in the network visibility industry.

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

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)