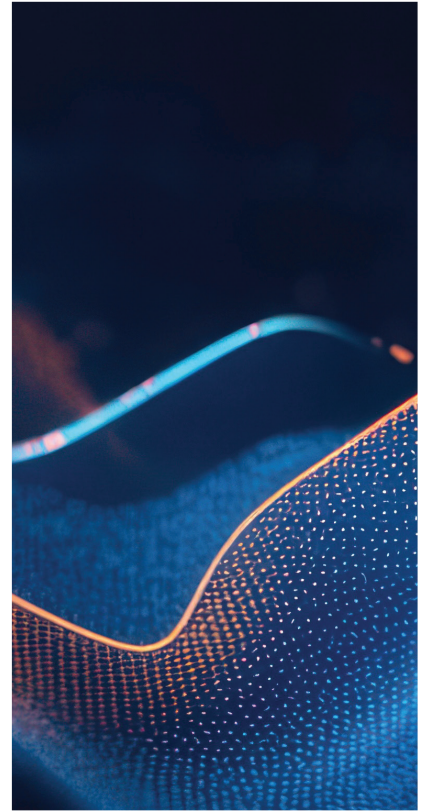
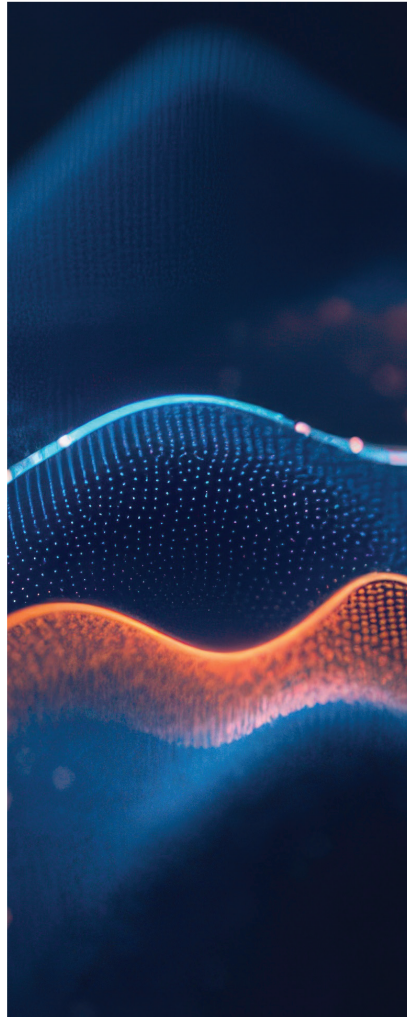


FROST & SULLIVAN
BEST PRACTICES



2026

JAPAN PRIVILEGED
ACCESS MANAGEMENT

COMPANY OF THE YEAR



Table of Contents

Best Practices Criteria for World-Class Performance	3
The Transformation of the Privileged Access Management Industry	3
NTT TechnoCross: Driving Digital Transformation Through Advanced ICT Solutions	4
Anticipating Market Shifts and Advancing Modern Privileged Access Security	4
Empowering Long-Term Customer Success Through Support and Engagement	6
Strengthening Market Leadership Through Innovation, Trust, and Partnerships	7
Conclusion	8
What You Need to Know about the Company of the Year Recognition	9
Best Practices Recognition Analysis	9
Visionary Innovation & Performance	9
Customer Impact	9
Best Practices Recognition Analytics Methodology	10
Inspire the World to Support True Leaders	10
About Frost & Sullivan	11
The Growth Pipeline Generator™	11
The Innovation Generator™	11

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 TechnoCross excels in many of the criteria in the privileged access management space.

RECOGNITION CRITERIA	
<i>Visionary Innovation & Performance</i>	<i>Customer Impact</i>
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

The Transformation of the Privileged Access Management Industry

Privileged access management (PAM) is evolving from a niche security control into a foundational component of modern identity security. As organizations expand their use of cloud services, distributed infrastructure, and hybrid operating models, demand for PAM is accelerating across every sector. Enterprises increasingly favor subscription-based and cloud-delivered solutions that can scale alongside dynamic environments, signaling a broader transition away from traditional infrastructure-centric security architectures.

This transformation is driven by the growing complexity of managing privileged access across geographically dispersed systems, cloud platforms, and third-party ecosystems. Organizations require platforms that can adapt rapidly to changing environments, automate administrative tasks, and continuously enforce security policies. At the same time, regulatory and data sovereignty requirements prevent many enterprises from fully abandoning on-premises controls, leading to greater adoption of hybrid architectures that combine centralized cloud management with localized enforcement mechanisms.

The emergence of artificial intelligence (AI)-powered automation and autonomous digital agents is further reshaping the privileged access landscape. Machine identities, service accounts, Application Programming Interfaces, robotic process automation bots, and AI agents increasingly perform tasks that require elevated permissions. As these non-human identities proliferate, organizations face growing challenges related to credential management, privilege oversight, and attack-surface expansion. Consequently, enterprises are seeking PAM solutions capable of discovering, governing, and securing both human and machine identities through automated controls and policy-driven access management.

Looking ahead, organizations are expected to move toward unified identity governance frameworks that provide centralized visibility and consistent control across users, applications, machines, and AI-driven entities. Rather than managing privileged access through disconnected tools, enterprises increasingly seek integrated platforms that deliver common governance policies, risk monitoring, and access controls across all environments and identity types.¹

NTT TechnoCross: Driving Digital Transformation Through Advanced ICT Solutions

NTT TechnoCross is a Japan-based information and communications technology company that develops software, cybersecurity, AI, cloud, networking, and digital transformation solutions for enterprise and public-sector organizations. As part of the Nippon Telegraph and Telephone (NTT) Group, it combines technologies developed by NTT research laboratories with commercial products and services to deliver solutions in areas such as privileged access management, contact center analytics, identity security, media processing, and system integration. Located in Tokyo, Japan, the company was established in its current form in 2017 through the merger of NTT Software and NTT IT, although its roots trace back to NTT Software, founded in 1985. NTT TechnoCross employs approximately 2,000 people and serves customers across multiple industries, including finance, telecommunications, government, manufacturing, and critical infrastructure.

Anticipating Market Shifts and Advancing Modern Privileged Access Security

Frost & Sullivan's analysis indicates that the PAM market is undergoing a significant transformation as organizations shift from traditional on-premises deployments to hybrid and cloud-based security

“Frost & Sullivan finds that NTT TechnoCross addresses these challenges through a unified platform that consolidates privileged account governance, access control, monitoring, auditing, access reviews, and analytics within a single environment. Rather than requiring organizations to deploy and manage multiple disconnected tools, the company enables centralized visibility into privileged activities and access risks while streamlining governance processes.”

- Marcos Ainchil
BPR Analyst

architectures. Enterprises are increasingly adopting approaches such as Just-in-Time (JIT) access and Zero Standing Privileges (ZSP) to reduce risks associated with persistent, privileged credentials, while seeking tighter integration across PAM, Endpoint Privilege Management (EPM), Identity Governance and Administration, and User Activity Monitoring. The market is also moving toward SaaS-based delivery models that offer greater scalability, flexibility, and operational efficiency.

NTT TechnoCross has aligned its strategy and product roadmap with these evolving requirements through investments in cloud-enabled PAM, integrated privilege governance, and support for Zero Trust frameworks. These capabilities are delivered through the iDoperation portfolio, which supports on-premises

and cloud deployments and includes privileged identity management, session recording, password management and rotation, multi-factor authentication, JIT role elevation, EPM, audit and analytics, and non-human identity management.

¹ Privileged Access Management, Global, 2025-2030 (Frost & Sullivan, May 2026)

Deployment preferences depend on organizational needs, regulatory requirements, and technology strategies. While large enterprises and financial institutions often prefer on-premises deployments for data residency and security reasons, cloud adoption is accelerating as part of digital transformation initiatives. NTT TechnoCross has become a key differentiator by supporting cloud, hybrid, and on-premises environments within a single platform.

Organizations increasingly cite regulatory compliance, ransomware defense, insider threat mitigation, and operational simplicity as key drivers of PAM investment. At the same time, many face challenges related to implementation complexity, cybersecurity skills shortages, and overlapping identity technologies. Frost & Sullivan finds that NTT TechnoCross addresses these challenges through a unified platform that consolidates privileged account governance, access control, monitoring, auditing, access reviews, and analytics within a single environment. Rather than requiring organizations to deploy and manage multiple disconnected tools, the company enables centralized visibility into privileged activities and access risks while streamlining governance processes. This approach is particularly valuable for large enterprises operating across hybrid and multi-cloud environments, where reducing operational complexity and improving oversight have become critical requirements for maintaining security and compliance.

The platform's value proposition is supported by capabilities that directly address evolving customer requirements for governance, visibility, and operational efficiency. Through features such as session recording, automated password rotation, Just-in-Time role elevation, Endpoint Privilege Management, audit analytics, and non-human identity management, the platform helps organizations strengthen control over privileged access while reducing reliance on manual processes. NTT TechnoCross reinforces

“To support adoption, the company provides professional services including consulting, deployment planning, implementation, training, troubleshooting, incident response, updates, and security patches. For cloud deployments, onboarding programs include initial sessions to establish processes and familiarize administrators with the platform, followed by continued guidance and knowledge transfer.”

- Vivien Pua
Industry Principal

this commitment through a structured product enhancement cycle, delivering updates twice annually that incorporate new security capabilities, operational improvements, and integrations designed to address emerging customer and market requirements.

NTT TechnoCross further differentiates itself through its ability to combine advanced privilege governance capabilities with operational simplicity. The company's approach centers on helping organizations move beyond traditional privileged account protection toward operating models that emphasize least-privilege enforcement, Zero Standing Privileges, and dynamic access control. Its agile development model enables rapid adaptation to changing customer

requirements, regulatory developments, and emerging threat landscapes, while its channel-focused strategy extends market reach and local support capabilities. Together, these strengths allow the company to deliver security controls that address increasingly complex access risks without imposing excessive administrative burdens on IT and security teams.

The platform's extensive integration ecosystem provides practical advantages for organizations seeking to incorporate privileged access management into broader cybersecurity and IT operations strategies. By

integrating with identity management, database auditing, log management, asset management, and service management platforms, NTT TechnoCross enables customers to leverage existing technology investments while improving visibility and coordination across security workflows. This interoperability helps reduce operational silos and supports more consistent governance across complex environments. In addition, the company leverages technologies developed within NTT research laboratories, including advanced encryption and video compression capabilities, to enhance security, optimize storage and performance requirements, and improve the efficiency of session monitoring and audit processes.

Frost & Sullivan observes that PAM is expanding beyond protecting privileged accounts to prevent privilege compromise. Technologies such as ZSP, JIT access, artificial intelligence, and non-human identity governance are becoming increasingly important in securing complex multi-cloud environments. NTT TechnoCross has anticipated these trends through investments in dynamic privilege management, automated access reviews, anomaly detection, and governance of human and machine identities. During 2024 and 2025, the company enhanced cloud interoperability, analytics, automation, SIEM integration, and JIT capabilities, while its roadmap includes ZSP models, AI-assisted analysis, and flexible deployment architectures.

Looking ahead, Frost & Sullivan expects greater platform convergence, broader identity governance, increased use of artificial intelligence, and continued adoption of cloud-native models. NTT TechnoCross has already aligned its roadmap with these market shifts through ongoing investments in Zero Standing Privilege operating models, AI-assisted analysis of operational records and activity logs, expanded automation capabilities, and governance of both human and non-human identities. Combined with its support for cloud, hybrid, and on-premises deployments, these initiatives position the company to address evolving enterprise requirements as organizations increasingly seek unified platforms that deliver centralized visibility, risk management, and access governance across diverse environments.

Empowering Long-Term Customer Success Through Support and Engagement

NTT TechnoCross emphasizes long-term customer value by extending its approach beyond software deployment to include onboarding, operational guidance, technical support, and continuous engagement. The company maintains a strong customer base, with enterprise contracts averaging approximately eight years and renewal rates exceeding 90%. Add-on capabilities typically follow the same pricing model as the core platform, with EPM as the primary exception.

To support adoption, the company provides professional services including consulting, deployment planning, implementation, training, troubleshooting, incident response, updates, and security patches. For cloud deployments, onboarding programs include initial sessions to establish processes and familiarize administrators with the platform, followed by continued guidance and knowledge transfer.

Customer engagement extends beyond deployment through operational reviews, product briefings, and consultation sessions that help optimize evolving environments and ensure awareness of new capabilities. Feedback gathered through customer programs informs continuous improvements.

The company maintains a strong reputation for reliability and responsive support, supported by coordination with distributors and partners. Customer satisfaction with support reached 4.6 out of 5.0 in

fiscal year 2025, reflecting improvements in service quality and responsiveness.² Long-term relationships and high renewal rates demonstrate the effectiveness of this support model.

The licensing model is primarily based on the number of managed systems, while EPM follows a user-based model. By combining ease of deployment, continuous engagement, and responsive support, the company enables customers to maximize the value of their PAM investments.

Strengthening Market Leadership Through Innovation, Trust, and Partnerships

The company pursues a distributor-centric sales strategy, expanding its reach through distributors, system integrators, and reseller partners. This approach enables broad coverage while supporting localized sales and services. Across APAC, the company strengthened its ecosystem in 2025 by expanding within Japan and establishing partnerships in Hong Kong, Indonesia, and Malaysia, enhancing regional coverage and customer support capabilities.

Customer advocacy remains strong. In fiscal year 2024, the company achieved a Net Promoter Score of 8.4 out of 10, with approximately 85% of customers indicating they would recommend its solutions. Customers highlighted support responsiveness, operational ease, and platform reliability as key strengths. Through its partner ecosystem, regional expansion, and strong customer satisfaction, NTT TechnoCross continues to strengthen its position in the PAM market, reinforcing its reputation and credibility. Large-scale deployments in power utilities, financial services, and telecommunications have contributed significantly.

Industry investment patterns continued to evolve in 2025. Financial institutions increased spending to address regulatory and cybersecurity demands, manufacturing organizations expanded investment due to digital transformation, technology companies addressed complex access environments, and government entities elevated cybersecurity priorities.

Large enterprises remained the primary drivers of PAM investment, with strong growth in manufacturing, power utilities, and IT services, where modernization, cloud migration, and infrastructure protection accelerated adoption.

The company's sustained growth, expanding presence in critical sectors, and increasing adoption among large enterprises demonstrate its ability to capitalize on evolving cybersecurity priorities. Continued investment in cloud migration, resilience, and access governance reinforces its strong market position and growth trajectory. Frost & Sullivan recognizes that these results highlight NTT TechnoCross's success in translating technology leadership and customer trust into measurable business performance, supporting its recognition for excellence in financial performance.

² Frost & Sullivan's Best Practices Research Discussion with NTT TechnoCross (June 2026)

Conclusion

NTT TechnoCross has distinguished itself through its forward-looking approach to Privileged Access Management (PAM), helping organizations address evolving cybersecurity challenges across increasingly complex hybrid and multi-cloud environments. Through its iDoperation portfolio, the company delivers comprehensive privileged access governance, advanced security controls, and operational efficiency within a unified platform.

The company has earned strong customer trust through continuous innovation, a customer-centric support model, and a commitment to balancing security, compliance, and usability. Its focus on emerging trends such as Zero Standing Privileges, AI-driven automation, software-as-a-service-based delivery, and non-human identity management positions it at the forefront of the evolving PAM market. By combining technology leadership, long-term customer commitment, and a clear vision for the future of access security, NTT TechnoCross has established itself as a trusted PAM provider and a deserving recipient of this recognition.

With its strong overall performance, NTT TechnoCross earns Frost & Sullivan's 2026 Japan Company of the Year Recognition in the privileged access management 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 megatrends 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)

