FROST & SULLIVAN

BEST PRACTICES



2026 GLOBAL ENTERPRISE MESSAGING SERVICES

COMPETITIVE STRATEGY LEADERSHIP

syniverse®

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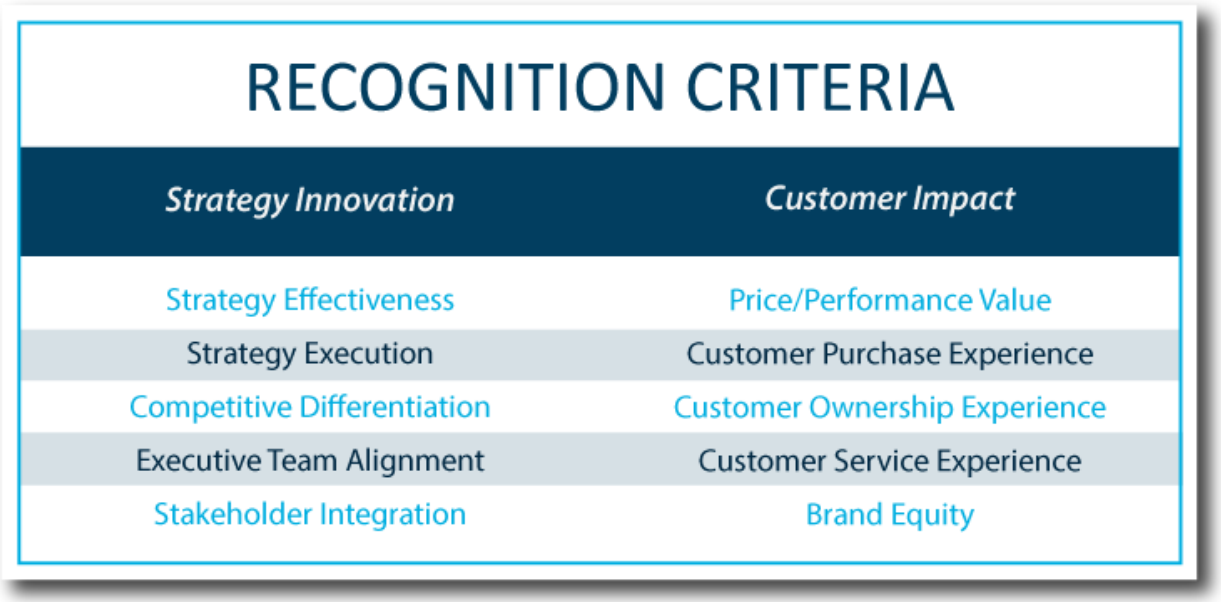
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Best Practices Criteria for World-Class Performance

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. Syniverse excels in many of the criteria in the global enterprise messaging services space.



The Transformation of the Enterprise Messaging Services Industry

The enterprise messaging services industry has shifted from volume-driven utility to mission-critical infrastructure underpinning authentication, regulatory communication, fraud prevention, and customer trust. As digital engagement expands across financial services, eCommerce, healthcare, and the public sector, messaging reliability has become essential to business continuity.

Enterprise evaluation has moved beyond routing reach and price efficiency toward delivery determinism, latency stability, fraud resilience, and regulatory alignment. Enterprises now judge messaging solely by its ability to safeguard transactions, enable identity verification, and ensure uninterrupted customer interaction. In authentication-heavy environments, milliseconds impact transaction success rates, revenue, compliance exposure, and brand reputation.

Rising fraud and tighter regulations have made trust a key competitive dimension. Enterprises need visibility into traffic integrity, governance controls, and accountability. Providers must demonstrate strong carrier connectivity, robust compliance operations, and integrated fraud intelligence. Surface-level API breadth is insufficient; infrastructure depth and ecosystem embeddedness are decisive differentiators.

This transformation has also reshaped competitive dynamics. Scale alone, no longer guarantees defensibility. Providers must align strategy with enterprise complexity, embed governance across the customer life cycle, and coordinate effectively with carriers, enterprises, and regulators. Industry value

now centers on assurance, not volume, redefining enterprise messaging's strategic role in global communications.

Enterprise-First, Future-Ready Solutions

> *"By concentrating on enterprises that value governance, reliability, and executive partnership, Syniverse reduces exposure to price-led competition while increasing defensibility through differentiated services and infrastructure depth."*
>
> ***- Krishna Baidya,***
> ***Sr. Director, ICT Practice,***
> ***Asia-Pacific***

Syniverse is a leading global enterprise messaging and mobility solutions provider with deep roots in carrier interconnect and international messaging infrastructure. Leveraging its embedded position within global operator ecosystems, the company delivers authentication-grade messaging, fraud resilience, and governance-driven reliability for large, regulated enterprises.

Its competitive strategy demonstrates disciplined segmentation, ecosystem leverage, and focused investment in trust-led growth rather than expansion into commoditized self-service markets. The company maintains an enterprise-first posture, prioritizing Global 2000 organizations and complex use cases. This segmentation shapes pricing, service architecture, compliance investments, and product roadmap priorities. By concentrating on enterprises that value governance, reliability, and executive partnership, Syniverse reduces exposure to price-led competition while increasing defensibility through differentiated services and infrastructure depth.

Portfolio coherence across mobility and messaging reinforces this strategy. Carrier relationships and interconnect heritage strengthen messaging performance and create synergy structural advantages that competitors without similar ecosystem proximity may struggle to replicate.

Syniverse's growth roadmap emphasizes RCS and mobile identity as forward-looking vectors. Leadership frames RCS as an early-stage enterprise opportunity, prioritizing low-friction onboarding and ROI experimentation rather than premature monetization. Identity capabilities, such as number verification and SIM swap detection, align with enterprise demand for frictionless authentication and fraud reduction. These adjacencies extend value beyond transport into trust enablement.

Execution That Sustains Trust

Syniverse demonstrates execution strength through scalable infrastructure, disciplined routing oversight, and structured performance governance aligned with authentication-critical use cases.

Its delivery model emphasizes predictability in high-stakes environments where messaging performance directly influences transaction success and customer trust. A carrier-integrated foundation supports stable routing and reduces intermediary dependency, reinforcing delivery determinism in authentication-heavy workflows. Formal performance reviews and proactive issue management align operational metrics with enterprise objectives.

Compliance readiness strengthens execution credibility. Audit familiarity and documented controls support enterprises in regulated sectors, reducing volatility and enhancing resilience in inspection-driven environments.

Customer retention track record reinforces this execution effectiveness. Enterprises that tested alternative providers have returned, citing performance and service differences. Consistency, responsiveness, and governance maturity sustain long-term relationships. Through infrastructure reliability, compliance rigor, and institutionalized oversight, Syniverse translates strategy into measurable, defensible outcomes.

Performance That Protects the Business

> *"By anchoring price-performance in infrastructure proximity, fraud mitigation, and disciplined operations, Syniverse redefines enterprise messaging economics. Its value equation aligns cost with assurance in environments where failure is minimal and stability directly supports business outcomes."*
>
> ***- Krishna Baidya,***
> ***Sr. Director, ICT Practice,***
> ***Asia-Pacific***

Syniverse operates in a global enterprise messaging services market where assurance increasingly outweighs marginal unit cost in price-performance evaluations. As messaging becomes essential for authentication and secure customer interactions, delivery reliability and fraud resistance drive vendor selection. Syniverse defines value through continuity, governance, and risk mitigation, aligning costs with operational certainty.

Its carrier-integrated architecture underpins this value proposition. Interconnect heritage and extensive operator relationships position Syniverse structurally closer to destination networks than many aggregator-dependent competitors. Its global connectivity and IPX foundation reduce routing intermediaries and enhance delivery predictability, particularly in time-sensitive authentication workflows such as one-time passwords. In these use cases, latency variability directly affects transaction completion, customer experience, and fraud exposure. The economic consequences of delayed or failed delivery frequently exceed incremental pricing differences.

Trust capabilities further strengthen price-performance. Messaging Trust operations combine AI-assisted detection with operational oversight to identify spam and fraudulent traffic. Syniverse extends these insights to enterprise customers through reporting and monitoring mechanisms that integrate into internal risk governance processes. Messaging therefore functions not only as a communications channel but also as a fraud mitigation layer that reduces reputational and financial risk.

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Engineered for Enterprise Ownership

Syniverse addresses the inherent complexity of enterprise messaging procurement, which spans IT, security, compliance, marketing, and customer experience stakeholders. Success depends on reducing implementation risk, embedding governance, and sustaining performance beyond deployment. Syniverse designs its life cycle model to operate as an enterprise partner rather than a self-service API provider.

A core differentiator is its institutionalized account coverage structure. Syniverse also offers dedicated commercial, solution architecture, customer success, and technical roles. This structure ensures

accountability across both strategic and operational domains, reduces escalation friction, and accelerates issue resolution. It also reflects deliberate segmentation: Syniverse prioritizes customers who value structured engagement and executive access.

Disciplined quarterly business reviews (QBR) reinforce governance and provide transparent operational reporting, roadmap alignment, and forward planning. Rather than routine updates, QBRs integrate Syniverse into enterprise planning cycles, enabling proactive adjustments as customers adopt new channels, such as RCS, or expand authentication use cases. This cadence reduces reactive firefighting and strengthens mutual accountability.

Compliance maturity further enhances purchase confidence. Syniverse emphasizes audit readiness and regulatory familiarity, particularly in BFSI and other regulated sectors. This reduces qualification friction where security and documentation requirements are rigorous.

Ownership value extends into trust operations. Syniverse provides fraud intelligence reporting and monitoring that integrates network insights into enterprise risk workflows. This continuous collaboration embeds the company within operational governance structures.

Through structured account coverage, proactive governance, compliance discipline, and trust-led services, Syniverse delivers a differentiated ownership experience aligned with enterprise complexity. Messaging functions not as a commodity API but as governed infrastructure supported by a long-term partnership framework.

Reputation Forged in Reliability

Syniverse treats brand equity as a trust asset earned through sustained performance in complex, regulated, and high-volume environments where delivery certainty and compliance discipline are non-negotiable. Its brand strength is anchored in its long-standing role in global mobile messaging and interconnect ecosystems, reinforced by enterprise retention and third-party validation rather than volume-led visibility.

Its global connectivity footprint and deep operator relationships position Syniverse as an embedded participant in communications infrastructure. Syniverse also contributes to broader industry governance initiatives that support messaging integrity and ecosystem trust. The company serves on the board of key industry bodies, including CTIA, Mobile Ecosystem Forum, and Campaign Verify. This infrastructure heritage strengthens credibility because reliability claims rest on tangible ecosystem integration. Enterprises evaluating mission-critical messaging partners prioritize vendors with demonstrable carrier alignment and operational maturity, particularly for cross-border deployments.

Enterprise loyalty further validates brand strength. Leadership highlights Global 2000 relationships lasting over a decade, with customers expanding the scope over time. Management also cites cases in which enterprises switched to lower-cost providers and later returned due to service and performance gaps. These patterns associate the Syniverse brand with reliability, governance discipline, and executive accessibility—qualities often overlooked until operational disruptions occur.

Credibility in regulated, high-stakes use cases reinforces this positioning. Syniverse emphasizes audit readiness and compliance familiarity common in BFSI and similar sectors. Participation in such

environments elevates perception from API provider to infrastructure-grade partner. Over time, Syniverse has established a significant niche among large enterprises that require high-touch support and compliance expertise.

Structural Advantage in a Converging Market

Syniverse differentiates in a converging API landscape through structural advantage rather than surface feature breadth. Its carrier-integrated architecture, trust-layer capabilities, and enterprise governance design form the core of this positioning. Extensive operator connectivity and interconnect heritage position Syniverse closer to carrier ecosystems than many aggregator-dependent competitors. This proximity supports performance reliability that resonates in regulated environments.

Messaging Trust operations and identity services, such as SIM swap detection and number verification, mitigate fraud risk and strengthen authentication integrity. This security depth distinguishes Syniverse from vendors emphasizing channel breadth. A high-touch engagement model reinforces differentiation. Dedicated account coverage and structured governance embed accountability into delivery. While competitors may match channel availability, replicating enterprise-grade governance at scale presents a higher barrier. Through structural proximity, trust enablement, and enterprise partnership design, Syniverse aligns its differentiation with mission-critical messaging priorities.

Integrated Across the Messaging Value Chain

Syniverse sustains strategic focus through consistent leadership alignment. Its executive narrative reinforces enterprise segmentation, measured innovation, and cross-portfolio coordination. Management clearly prioritizes enterprise customers, guiding pricing, service design, and resource allocation. Alignment between mobility and messaging portfolios demonstrates coordinated execution rather than parallel expansion.

RCS and mobile identity remain defined growth vectors, with calibrated expectations on adoption and monetization. AI strategy is pragmatic, centered on fraud detection and anti-spam—not broad conversational AI claims. Structured executive engagement through governance forums reinforces alignment between strategy and delivery.

Syniverse also demonstrates stakeholder integration. Participation in industry standards discussions supports alignment on trust, identity, and compliance priorities. Co-creation workshops, governance cadence, and fraud intelligence reporting embed network insights into enterprise risk workflows. Alliance partnerships extend platform reach while preserving enterprise focus.

By coordinating carriers, enterprises, and partners within a cohesive operating model, Syniverse functions as an ecosystem integrator rather than a standalone API vendor, reinforcing its leadership position in the market.

Conclusion

Syniverse demonstrates competitive strategy leadership in the global enterprise messaging services market through focused initiatives, structural differentiation, and enterprise-level execution. Instead of competing on commoditized API breadth or transactional pricing, the company anchors its position in carrier-integrated infrastructure, trust-layer intelligence, and governance-centered engagement. Proximity to operator ecosystems improves delivery reliability in authentication-critical workflows, while Messaging Trust and identity features raise messaging from transport utility to security control layer. This combination directly addresses enterprise needs around continuity, compliance, and risk management.

Strategy and execution remain tightly aligned. Enterprise-first segmentation, structured governance, compliance discipline, and sustained Global 2000 retention validate strategic clarity and operational maturity. Leadership prioritizes high-value growth vectors, such as RCS and mobile identity, without diluting positioning through opportunistic expansion. By integrating carriers, enterprises, and ecosystem partners within a coordinated operating framework, Syniverse positions itself not merely as a CPaaS provider but as a trusted infrastructure partner.

For its strong overall performance, Syniverse is presented with Frost & Sullivan's 2026 Global Competitive Strategy Leadership Award in the enterprise messaging services industry.

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What You Need to Know about the Competitive Strategy Leadership Recognition

Frost & Sullivan's Competitive Strategy Leadership Recognition identifies the company with a standout approach to achieving top-line growth and a superior customer experience.

Best Practices Recognition Analysis

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

Strategy Innovation

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

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

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

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

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

Customer Impact

Price/Performance Value: Products or services offer the best ROI and superior value compared to similar market offerings

Customer Purchase Experience: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

Customer Ownership Excellence: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

Customer Service Experience: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

		VALUE IMPACT	
STEP		WHAT	WHY
1	**Opportunity Universe**	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	**Transformational Model**	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	**Ecosystem**	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	**Growth Generator**	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	**Growth Opportunities**	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	**Frost Radar**	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	**Best Practices**	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	**Companies to Action**	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at http://www.frost.com.

The Growth Pipeline Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is 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)

