

F R O S T & S U L L I V A N

# 2024 COMPANY OF THE YEAR

*IN THE GLOBAL  
NETWORK MONITORING  
AND SERVICE  
ASSURANCE INDUSTRY*

NETSCOUT®

F R O S T & S U L L I V A N

BEST  
2024 PRACTICES  
AWARD

## Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award 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 and service assurance space.

AWARD CRITERIA	
<i>Visionary Innovation &amp; Performance</i>	<i>Customer Impact</i>
Addressing Unmet Needs	Price/Performance Value
Visionary Scenarios Through Mega Trends	Customer Purchase Experience
Implementation of Best Practices	Customer Ownership Experience
Leadership Focus	Customer Service Experience
Financial Performance	Brand Equity

### *Evolving Landscape of Network Monitoring and Service Assurance*

The network monitoring and service assurance market is evolving rapidly, driven by escalating data demands, the shift toward cloud-centric infrastructure, and the complexities of modern network architectures. As organizations increasingly adopt cloud-based data centers to enhance scalability, flexibility, and cost-efficiency, there is an urgent need for sophisticated monitoring solutions capable of managing the growing intricacies of these environments.

The rollout of fifth-generation (5G) technology and network virtualization introduces transformative benefits and new challenges. As networks evolve towards disaggregated, cloud-native architectures, traditional monitoring methods struggle to keep pace with the demands of these virtualized environments. The complexity of 5G networks, characterized by extensive virtualization, low-latency performance requirements, and diverse network functions, demands innovative, software-centric solutions that offer comprehensive end-to-end visibility and seamless integration. Additionally, emerging technologies such as artificial intelligence (AI) and edge computing further influence the market. AI-driven analytics enhance real-time insights and predictive capabilities. Meanwhile, edge computing introduces new monitoring challenges and opportunities as data processing shifts closer to the source, demanding solutions that can adapt to distributed architectures.

The rise of Open Radio Access Network (O-RAN) architectures heightens the complexity of monitoring needs. O-RAN's open and disaggregated approach requires advanced solutions that provide visibility across various multi-vendor environments. Regulatory and compliance factors, such as data privacy and security regulations, are becoming increasingly pertinent as data volumes and network complexities grow. As these trends continue to reshape the landscape, businesses must stay ahead by adopting innovative solutions that address current challenges and anticipate future demands.

*"NETSCOUT demonstrates a clear vision for the future of network monitoring. The company's emphasis on end-to-end network visibility, including the RAN, is essential for comprehensive monitoring in complex network environments where RAN performance directly impacts user experience."*

**- Ain Sarah Aishah**  
**Best Practices Research Analyst**

### **NETSCOUT: Driving Excellence and Innovation in Network Solutions**

Founded in 1984 and headquartered in Westford, Massachusetts, United States, NETSCOUT is a global leader in network monitoring and service assurance solutions. Specializing in performance management, cybersecurity, and DDoS protection, NETSCOUT provides critical capabilities in network observability and service assurance, addressing evolving market demands. The company's product portfolio includes advanced virtual appliances designed for comprehensive application

monitoring within public/private cloud environments. Cutting-edge technologies such as deep packet inspection, artificial intelligence (AI), and machine learning (ML) algorithms distinguish its solutions. These technologies enable NETSCOUT to deliver in-depth network traffic analysis, providing actionable insights into performance, security, and user experience.

The flagship nGenius® platform exemplifies NETSCOUT's innovative approach. It integrates these advanced technologies into a unified solution for network visibility and service assurance, offering a comprehensive strategy to manage complex network environments. The company's integration of deep packet inspection with AI-driven analytics provides a more comprehensive view of network performance and security, setting it apart in the industry. NETSCOUT's emphasis on technological advancement and its focus on addressing critical customer needs solidify its reputation as a pioneer in the industry. The company's commitment to innovation and customer-centric solutions is evident in its ability to navigate the evolving needs of the network service assurance market.

Frost & Sullivan consistently recognizes NETSCOUT's excellence and innovation, acknowledging its role in driving business success and delivering exceptional value. Through its ongoing dedication to advancing network monitoring and service assurance solutions, the company continues to set industry standards and lead in the global market. As NETSCOUT forges ahead, its continued innovation and strategic vision are crucial in shaping the future of network monitoring and service assurance.

### **Advancing Network Assurance: Strategic Approaches and Innovations**

At the core of NETSCOUT's strategy is a profound understanding of emerging trends and long-term industry shifts, reflected in its innovative product offerings and strategic foresight. Addressing evolving needs, the company introduced various groundbreaking products over the past few years. The nGenius®ONE platform, for instance, offers deeper insights into network performance, leveraging AI/ML

to provide actionable intelligence. This advancement aligns with the industry's shift towards more intelligent and automated network management solutions.

NETSCOUT's strategic foresight is further evident in its adaptability to market trends and focus on long-term growth. The company's extension towards subscription-based models, such as the nGenius Vantage Point Software solution, illustrates an understanding of shifting customer needs for scalable solutions. This subscription-based offering integrates NETSCOUT instrumentation with nGeniusONE Performance Management software, allowing enterprises to eliminate blind spots that have emerged due to digital transformations. By providing flexibility, this model aligns with the broader industry trend towards recurring revenue streams, which are critical for financial stability and growth. Additionally, NETSCOUT's commitment to green initiatives and pursuit of carbon neutrality reflects a forward-thinking approach that addresses customer concerns and aligns with global sustainability trends, demonstrating the company's leadership in the market.<sup>1</sup>

### ***Visibility Without Borders***

The NETSCOUT Visibility Without Borders (VWB) platform is a pivotal innovation that addresses increasing network complexity and security threats. The platform offers a comprehensive solution by integrating performance management, cybersecurity, and availability, providing unparalleled insights critical for organizational operations. By leveraging the real-time metadata derived from network traffic and packet data, the company's patented Adaptive Service Intelligence (ASI) technology forms the core of the VWB platform. This technology ensures a consistent data source across information technology infrastructures, enabling enterprises to increase their operational efficiency and security comprehensively.

Furthermore, the platform enhances availability through Arbor DDoS Protection, safeguarding digital infrastructures and critical services from the rising threat of DDoS attacks. For service assurance, nGenius for Carrier Service Assurance improves the quality of service and customer experience across various technologies, including 4G/5G, mobile, Internet of Things, cloud, and edge environments. The VWB platform's shared network data collection infrastructure promotes collaboration among multiple teams within an organization, resulting in a highly efficient operational model essential in today's complex digital landscape.

### ***Business Edge Observability Suite***

Further addressing critical market needs, NETSCOUT launches its Business Edge Observability suite, including the nGenius Edge Sensor and Remote InfiniStreamNG solutions. These products tackle the essential requirement for enhanced observability at remote locations, such as retail stores, hospitals, and utility companies, where mission-critical applications operate at the digital edge. By combining ASI technology with synthetic transaction testing and automatic decryption, the company provides comprehensive visibility and control. This is crucial for minimizing business risk and enhancing operational efficiency in remote settings, especially as remote and edge computing environments become increasingly prevalent and require specialized monitoring. This solution highlights NETSCOUT's proactive approach to

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<sup>1</sup> Frost & Sullivan's Interview with NETSCOUTS (July 2024)

addressing the specific needs of various industries, reinforcing its position as a leader in network monitoring and service assurance.

These strategic initiatives position NETSCOUT at the forefront of network monitoring innovation, ensuring it remains a vital partner in navigating the complexities of the digital era.

*“The company’s customer-centric approach, combined with its innovative solutions and strong focus on optimizing total cost of ownership, results in high customer satisfaction ratings and a strong customer retention rate.”*

**- Ain Sarah Aishah**  
**Best Practices Research Analyst**

### ***Pioneering Market Advancement and Strategic Vision***

NETSCOUT’s dedication to market leadership is evident in its strategic partnerships and commitment to best practices. The company collaborates actively with leading industry players to deliver comprehensive solutions. For instance, its partnerships with network equipment manufacturers for core network packet acquisition and virtual Test Access Point integrations for network virtualization deployments showcase its commitment to providing holistic visibility solutions that integrate seamlessly with existing network infrastructure.

NETSCOUT demonstrates a clear vision for the future of network monitoring. The company’s emphasis on end-to-end network visibility, including the radio access network (RAN), is essential for comprehensive monitoring in complex network environments where RAN performance directly impacts user experience. Furthermore, NETSCOUT’s active involvement in open radio access network (O-RAN) solutions through partnerships with key players such as Mavenir highlights its role in shaping the future of telecommunications infrastructure.<sup>2</sup> By addressing emerging standards and technological advancements, the company positions itself at the forefront of industry evolution, ensuring its solutions remain relevant and effective.

The extension of NETSCOUT’s partnership with Vodafone exemplifies its strategic focus on leadership and market impact. By integrating InfiniStreamNG for real-time, end-to-end visibility across Vodafone’s network, including 5G Standalone, the company enhances Vodafone’s network performance and demonstrates its capability to support next-generation telecommunications infrastructure.<sup>3</sup> This partnership showcases NETSCOUT’s expertise in delivering tailored solutions for complex, large-scale network environments, highlighting its ability to build strong, strategic relationships with major industry players. Through this commitment in improving network control and customer experience, the company validates its effectiveness in meeting the demands of modern telecommunications.

Additionally, NETSCOUT’s visionary approach is demonstrated through the expansion of the Arbor Cloud DDoS attack mitigation network. With the addition of a new scrubbing center in Toronto, Canada, the company enhances its ability to offer low-latency, high-capacity DDoS protection.<sup>4</sup> This expansion underscores NETSCOUT’s adaptability to evolving market needs and its proactive stance in addressing the increasing frequency and complexity of DDoS attacks. The ability to handle over 15 terabits per second of

<sup>2</sup> Frost & Sullivan’s Interview with NETSCOUT (July 2024)

<sup>3</sup> <https://ir.netscout.com/investors/press-releases/press-release-details/2024/NETSCOUT-and-Vodafone-Extend-Relationship-Through-Multi-Year-Network-Monitoring-Agreement/default.aspx>

<sup>4</sup> <https://ir.netscout.com/investors/press-releases/press-release-details/2024/NETSCOUT-Expands-DDoS-Scrubbing-Capabilities-Into-Canada/default.aspx>



attack traffic demonstrates the company's commitment to providing scalable, innovative solutions that meet universal security demands. By leveraging global visibility and threat intelligence through the company's ATLAS (Arbor Threat Level Analysis System) platform, NETSCOUT ensures comprehensive protection against multi-vector DDoS attacks, reinforcing its leadership in cybersecurity and service assurance. This proactive expansion in DDoS mitigation capabilities is crucial for maintaining robust security in an increasingly threat-laden digital landscape.

NETSCOUT's commitment to understanding customer business challenges and leveraging this insight into actionable solutions is a cornerstone of its strategic approach. This focus on addressing the specific needs of customers drives the development of solutions that extend beyond traditional service assurance. For example, the company's AI Ops solutions, featuring AI Streamer, address the increasing demand for network analytics and proactive problem identification.<sup>5</sup> By enabling operators to anticipate and resolve issues before they impact service delivery, NETSCOUT's solutions improve operational efficiency and align with the growing trend of integrating AI into network management. This proactive approach is crucial for maintaining high service quality in today's dynamic network environments.

NETSCOUT's proactive strategies and innovative solutions underscore its leadership in addressing the complex challenges of modern network environments and advancing the future of network service assurance.

### *Optimizing Value and Enhancing Customer Satisfaction*

NETSCOUT's strategy focuses on delivering exceptional value to customers while optimizing the total cost of ownership. The company recognizes that customers increasingly evaluate solutions based on initial purchase price and long-term operational costs. NETSCOUT addresses these concerns by reducing the physical and operational footprint of its solutions. A prime example is the company's Omnis AI Streamer. As a leading AIOps data curation platform, Omnis AI Streamer is essential in processing extensive network data to deliver a curated feed, complete with aggregation, filtering, and correlation through a data pipeline to a third-party AIOps engine. By prioritizing the reduction of redundant data storage, the company significantly enhances cost-efficiency without sacrificing performance, allowing customers to optimize their return on investment. This emphasis on scalability and cost-effectiveness aligns with NETSCOUT's broader goal of offering flexible and affordable solutions that meet the various needs of its customers. This commitment to efficiency and cost-effectiveness results in significant savings while maintaining high-performance standards.

NETSCOUT prioritizes a customer-centric approach throughout the entire customer journey. From initial engagement to solution deployment, the company ensures the purchase experience aligns with customers' needs and constraints. The sales team is trained to understand the specific challenges customers face, ensuring solutions are tailored to address their unique needs. Furthermore, the involvement of senior management, including chief executive officer, Anil Singhal, in customer interactions<sup>6</sup> underscores NETSCOUT's dedication to building strong, trust-based relationships. This

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<sup>5</sup> Frost & Sullivan's Interview with NETSCOUTS (July 2024)

<sup>6</sup> Ibid.

commitment to understanding customer requirements and tailoring solutions is instrumental in fostering customer loyalty and satisfaction.

NETSCOUT's emphasis on best practices and transparency empowers customers to make informed decisions. By providing comprehensive guidance on network monitoring and total cost of ownership, the company equips customers to evaluate solutions holistically. This approach strengthens customer relationships, reinforcing NETSCOUT's position as a trusted advisor in the industry. The company's customer-centric approach, combined with its innovative solutions and strong focus on optimizing total cost of ownership, results in high customer satisfaction ratings and a strong customer retention rate. This customer-centric focus is a cornerstone of NETSCOUT's overall value proposition in building a strong brand reputation.

With a robust strategy centered on cost-effectiveness and customer satisfaction, NETSCOUT is well-positioned to deliver superior solutions in a competitive market.

### ***Financial Performance and Market Leadership***

NETSCOUT demonstrates consistent financial growth and market leadership. Building upon its strong foundation, the company continues to achieve notable success. In 2023, Frost & Sullivan recognized NETSCOUT as the global network monitoring and service assurance solutions market leader, with a significant 7% increase in revenue compared to the previous year. This growth trajectory highlights the company's ability to capitalize on market opportunities and deliver substantial value to its customers. In fiscal year 2024, NETSCOUT generated a total revenue of \$829.5 million, demonstrating its consistent capability to seize market opportunities and maintain a strong performance in a dynamic market environment.<sup>7</sup>

A standout achievement for NETSCOUT in fiscal year 2024 was the substantial double-digit revenue growth in its cybersecurity segment.<sup>8</sup> This impressive performance underscores the company's commitment to addressing the escalating threat landscape with innovative solutions that meet the evolving needs of its customers. The growth in cybersecurity revenue is a key driver of overall financial stability.

NETSCOUT's strategic initiatives and operational efficiency further illustrate its ability to adapt and thrive. The company's resilience and strategic acumen reflect its commitment to maintaining a strong financial position and achieving long-term success. Overall, Frost & Sullivan's recognition of NETSCOUT's impressive growth momentum and market trajectory is a testament to its product leadership, affirming the company's role as a trusted innovator and enhancing market share.

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<sup>7</sup> <https://ir.netscout.com/investors/press-releases/press-release-details/2024/NETSCOUT-Reports-Fourth-Quarter-and-Full-Fiscal-Year-2024-Financial-Results/default.aspx>

<sup>8</sup> Ibid.

## Conclusion

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NETSCOUT strongly establishes its position as the frontrunner in the rapidly evolving network monitoring and service assurance market. The company's commitment to innovation and customer-centric solutions is pivotal in addressing the challenges presented by modern network architectures, including the complexities of fifth generation technology, artificial intelligence (AI), and edge computing. NETSCOUT's advanced technologies, such as deep packet inspection and AI-driven analytics, enable comprehensive network visibility and service assurance, meeting the various needs of its customers. The company's emphasis on delivering exceptional value to customers, while optimizing total cost of ownership, is instrumental in building strong customer relationships and fostering loyalty. By addressing the critical challenges organizations encounter in today's complex network environment, NETSCOUT empowers its customers to make informed decisions, improve operational efficiency, and mitigate risks.

With its strong overall performance, NETSCOUT earns Frost & Sullivan's 2024 Global Company of the Year Award in the network monitoring and service assurance industry.



## What You Need to Know about the Company of the Year Recognition

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Frost & Sullivan's Company of the Year Award is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

### Best Practices Award Analysis

For the Company of the Year Award, 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 by a robust solution development process

**Visionary Scenarios Through Mega Trends:**

Long-range, macro-level scenarios are incorporated into the innovation strategy through the use of Mega Trends, thereby enabling first-to-market solutions and new growth opportunities

**Leadership Focus:** Company focuses on building a leadership position in core markets and on creating stiff barriers to entry for new competitors

**Best Practices Implementation:** Best-in-class implementation is characterized by processes, tools, or activities that generate a consistent and repeatable level of success

**Financial Performance:** Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

#### *Customer Impact*

**Price/Performance Value:** Products or services provide the best value for the price compared to similar market offerings

**Customer Purchase Experience:** Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

**Customer Ownership Experience:** Customers proudly own the company's product or service and have a positive experience throughout the life of the product or service

**Customer Service Experience:** Customer service is accessible, fast, stress-free, and high quality

**Brand Equity:** Customers perceive the brand positively and exhibit high brand loyalty

## 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 Engine™

Frost & Sullivan’s proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

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### 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:

- **Mega Trend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

