FROST & SULLIVAN

2022 Frost & Sullivan
2022 Global 5G NR Drive Test Solutions **Market Leadership Award**

The Global 5G NR Drive Test Solutions Industry

Infovista SAS

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. Infovista excels in many of the criteria in the 5G new radio drive test solutions space.

AWARD CRITERIA

Growth Strategy Excellence	Technology Leverage
Implementation Excellence	Price/Performance Value
Brand Strength	Customer Purchase Experience
Product Quality	Customer Ownership Experience
Product Differentiation	Customer Service Experience

A Market Snapshot: 5G NR Network Drive Testing

Fifth generation (5G) new radio (NR) deployments are creating complex and novel drive testing requirements. As of 2022, most 5G networks are rolled out in the 3.5 gigahertz spectrum band, increasing drive testing and propagation model tuning demand. More importantly, data sharing drives the need for

> *"With its longevity and expertise in drive test solutions technologies, Frost & Sullivan finds Infovista well-positioned to support organizations transitioning to 5G. The company's innovative, end-to-end network testing solutions for existing and next-generation communication systems and operations span the entire network lifecycle."*
>
> *- Sujan Sami,*
> *Research Director*

simplified "as-a-service" solutions deployment, including key 5G enablers like network slicing, millimeter wave, multiple-input/multiple-output, and device-centric approaches. Despite 5G NR progression, existing challenges affecting the wireless network test equipment space continue to impact adoption. Traditionally, wireless network testing equipment is expensive. High operational complexity and infrastructure costs of new wireless networks lead to increased capital expenditure and total cost of ownership over time.

As leading global network operators compete to bring 5G networks online, their existing infrastructure requires an overhaul. Staying relevant in the market by continuously updating their product portfolios with the latest 5G-compatible technologies challenges many in the space. Frost & Sullivan estimates that the 5G NR drive test solutions market will reach $7.9 billion in 2026, with a compound annual growth rate of about 10.9% from 2021 to 2026.[1]

---

[1] *Global Wireless Network Test Equipment Growth Opportunities* (Frost & Sullivan, February 2022)

Best Practices Excellence: Infovista

Founded in 1996 and headquartered in Massy, France, Infovista SAS (Infovista) is a global drive test solutions pioneer, supporting networks ranging from second-generation, third generation and fourth-generation long-term evolution (LTE) and LTE Advanced technologies to 5G deployments. With its longevity and expertise in drive test solutions technologies, Frost & Sullivan finds Infovista well-positioned to support organizations transitioning to 5G. The company's innovative, end-to-end network testing solutions for existing and next-generation communication systems and operations span the entire network lifecycle. In 2021, Frost & Sullivan recognized Infovista for its product strength, market leadership, and ongoing customer-centric approach and remains impressed with the company's continuing innovation and sustained leadership.

Building upon a Strong Foundation

Infovista is one of the world's top solution providers that develops 5G NR testing solutions for various industries. The company built a world-renowned reputation through the years, partnering with industry leaders, such as Qualcomm, Samsung, and Nokia, to become a giant in the network drive testing market. With over 800 employees and more than 1500 clients globally, which includes 75% of Tier 1 Communication Service Providers, Infovista is uniquely positioned to offer fully automated, cloud-based solutions that empower its customers with features like remote data collection, real-time diagnosis, and cost-effective testing. More importantly, Infovista stays abreast of the network testing market by creating and launching new capabilities and leading-edge technologies.

Infovista focuses on developing new products and solutions to support emerging technologies and address relevant customer needs. The company also enhances its portfolio by consistently introducing new models and capabilities to pre-empt and meet new requirements, driven by changing customer usage habits and advanced network and drive technology.

> *"Infovista's primary mission is to provide end-to-end support to communications service providers and enterprises, optimizing their networks and identifying and fulfilling customer needs. Continuous efforts in technology improve upon existing products and pave its roadmap to advance the market. The company taps into available growth opportunities by leveraging its expertise, global presence, collaborations, and innovations."*
>
> *- Samantha Fisher,*
> *Best Practices Research Analyst*

As of 2022, the mature network testing market is experiencing a shift toward key areas, such as virtualization and automation. As networks grow more complex and virtualized, the need for highly automated virtualized testing solutions is increasing. To address this rising demand, Infovista launched Precision Drive Testing™ (PDT), a drive-by network audit system that automates 5G network testing by leveraging a vehicle and omniscient configuration machine. The cloud-native, data-driven artificial intelligence (AI) and machine learning (ML) technology automatically assesses any 5G network while a driver transports the communications testing device around the network via a vehicle. As a result, the car does the heavy lifting, efficiently completing the time-consuming tests and checks usually administered by a specialized engineer, sans human error. Infovista's current PDT use cases include automated single-site verification (SSV), fine-tuning 5G planning propagation models, network acceptance automation, geolocated troubleshooting, proactive network health monitoring, and critical network assurance.

Infovista's primary mission is to provide end-to-end support to communications service providers and enterprises, optimizing their networks and identifying and fulfilling customer needs. Continuous efforts in technology improve upon existing products and pave its roadmap to advance the market. The company taps into available growth opportunities by leveraging its expertise, global presence, collaborations, and innovations. Frost & Sullivan finds the company has two competitive advantages: high technical proficiency and a strong reputation, both of which have propelled it to a market leader position. More importantly, its reputation, brand equity, and innovative prowess empower it to discover new opportunities, aligning it for more success.

Technology Integration Supports Market Dominance

With its TEMS® portfolio, Infovista addresses an unmet market need not easily replicated by competitors. Frost & Sullivan predicts the rapid 5G wireless ecosystem development, and deployment will lead to a legacy network infrastructure overhaul, driving network operators to embrace cloud-based network infrastructure, services, and solutions. Infovista monitors industry trends to anticipate such transformations; thus, the company developed TEMS® Cloud to move its portfolio into the cloud. Presently, in a system like TEMS® Investigation, all scripting is stored on a local machine, which relies heavily on engineers sharing various scripts; with TEMS® Cloud, all data logs are uploaded to an accessible cloud automatically.

The company started the rollout in February 2022 with the launch of TEMS® Cloud for SSV, a solution that enables operators to control and manage an entire TEMS® probe fleet. The solution also links the collected data with thresholds that identify testing requirements. Infovista incorporates leading-edge technologies into its TEMS® products to enhance overall performance and value. Through a Definition of Done algorithm, TEMS® Cloud for SSV triages work orders, and the integrated AI/ML determines the driver's destination, testing type, and testing duration. Infovista's superior capabilities facilitate in-depth subscriber experience and service quality analysis, resulting in improved network investment decisions.

A Customer-centric Approach Driving Unmatched Client Experience

Infovista's approach goes beyond its extensive experience and best-in-class capabilities, with customer value as a strategic imperative. Through the years, the company has earned a sterling reputation supporting its customers' path toward optimized network testing.

Unlike competitors, Infovista builds its products by collaborating closely with a range of stakeholders and partners to evolve alongside market needs and trends. To expand its technologies and market reach, the company offers Infovista Technology Alliance, which are close partnerships with major original equipment manufacturer devices and chipset vendors, such as Apple. As a result of this alliance, Infovista is able to officially support the iPhone within its TEMS products. This means its customers are able to undertake network testing with the exact device used by many of their subscribers, providing them with unparalleled insights into subscriber experience. The company also has partnerships with prominent companies like Ericsson, PCTEL, and umlaut.

- **Ericsson** partnered with Infovista to support network design and optimization automation via Ericsson's rApp platform, supporting the client's overall cloud-native microservice integration into the Ericsson Intelligent Automation Platform.

- **PCTEL**, a leading industrial wireless technology solutions provider, collaborated with Infovista to develop mobile operator and industry regulator 5G network testing use cases. This partnership

delivered PGTEL 5G scanning receivers and Infovista's highly acclaimed TEMS® software.

- **umlaut** and Infovista joined forces to provide actionable service performance insights to network operators, regulators, and telecommunications-related industries.

More importantly, Infovista's technology and best-in-class purchase experience enable new customer acquisitions. The company works closely with customers throughout the purchase process, including employing account directors to help clients navigate the solutions suite. Since much of the company's product portfolios involve software, clients can download the product and start using it almost immediately. The company offers a customer support portal that includes the latest upgrades, frequently asked questions, and support documentation; customers can also contact support for queries, questions, and bugs to log. Most importantly, Infovista focuses on providing best-in-class customer service that "humanizes" the experience. Thus, a service request is assigned to a single human point of contact. This employee is responsible for the ticket throughout the support process. To maintain the company's human-centric approach, Infovista's support specialists directly engage with the client via phone or email. While many competitors look to automate these services, Infovista believes in the tried-and-true human interaction approach, which its clients appreciate, as demonstrated by its 80 to 95 Net Promoter Score range.

Infovista continues to expand its service offerings, with a current focus on providing e-commerce through its sales team, which includes minor upgrades and license renewals. The company is designing this offering as a self-service portal in its customer support platform. Instead of requiring contact with the sales team, clients can purchase what they need online. While similar competing solutions drive frustration in clients due to inefficiency, Infovista demonstrates its customer focus by improving the customer experience end-to-end.

Frost & Sullivan commends Infovista for its ongoing excellence and finds the company's frictionless approach and close relationships position it as a partner of choice and reinforces its market leadership.

Conclusion

A company does not become a market leader overnight. It takes dedication to develop growth strategies paired with excellent implementation. A market leader must earn and maintain customers' trust while impacting and improving the overall market. Infovista SAS (Infovista) embodies Frost & Sullivan's definition of a market leader through its innovative technology, knowledge leadership, and partnerships. The company's mission is to provide end-to-end support to its customers. Thus, Infovista designed its comprehensive TEMS® solutions suite to address all stages of fifth generation (5G) network testing and deployment. It continuously introduces new technologies, such as TEMS® Cloud, to support its clients. Moreover, Infovista's close partnerships enable its unique innovations and capabilities, including official support for the iPhone in its TEMS products. Due to these reasons and more, the company is respected, recognized, and endorsed, elevating it to a market leader position.

With its strong overall performance, Infovsita earns Frost & Sullivan's 2022 Global Market Leadership Award in the 5G new radio drive test solutions.

What You Need to Know about the Market Leadership Recognition

Frost & Sullivan's Market Leadership Award recognizes the company that achieved the greatest market share resulting from outstanding performance, products, and services.

Best Practices Award Analysis

For the Market Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Growth Strategy Excellence: Company demonstrates an ability to consistently identify, prioritize, and pursue emerging growth opportunities

Implementation Excellence: Company processes support efficient and consistent implementation of tactics designed to support the strategy

Brand Strength: Company is respected, recognized, and remembered

Product Quality: Products or services receive high marks for performance, functionality, and reliability at every stage of the life cycle

Product Differentiation: Products or services carve out a market niche based on price, quality, or uniqueness (or some combination of the three) that other companies cannot easily replicate

Technology Leverage: Company is committed to incorporating leading-edge technologies into product offerings to enhance product performance and value

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 are proud to 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 of high quality

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™.
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:

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