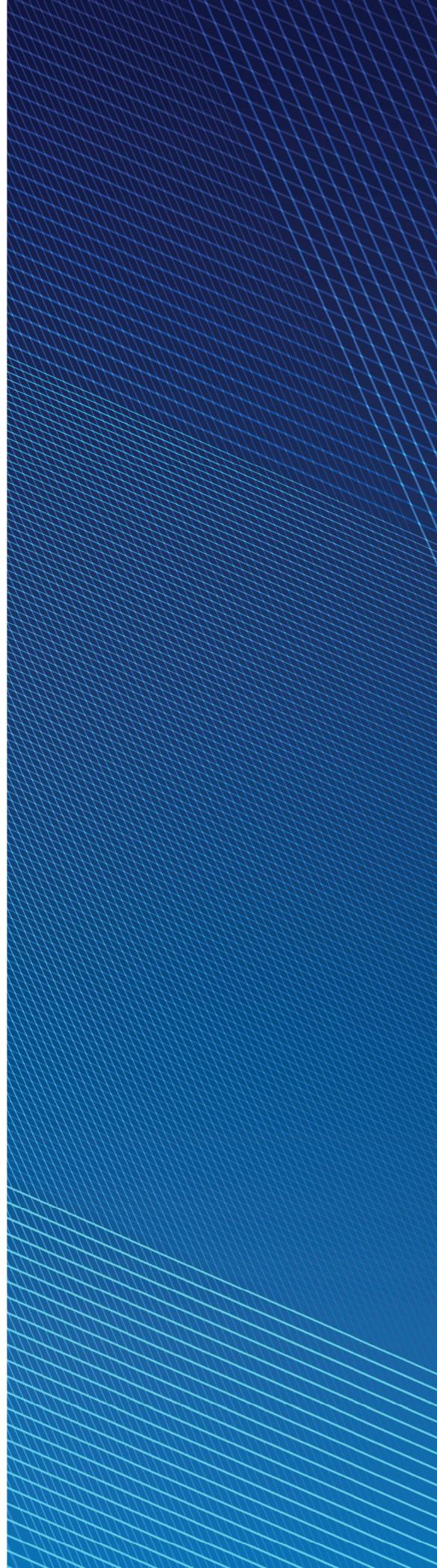


COMARCH RECEIVES THE 2023 COMPETITIVE STRATEGY LEADERSHIP AWARD

*Identified as best in class in the European mobile field
service management industry*



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. Comarch excels in many of the criteria in the mobile field service management space.

AWARD CRITERIA	
<i>Strategy Innovation</i>	<i>Customer Impact</i>
Strategy Effectiveness	Price/Performance Value
Strategy Execution	Customer Purchase Experience
Competitive Differentiation	Customer Ownership Experience
Executive Team Alignment	Customer Service Experience
Stakeholder Integration	Brand Equity

Automation and Artificial Intelligence Drive Growth in the Field Service Management Market

Mobile field services management (FSM) software solutions continue to be a popular digital investment area, bringing real-time guidance to workers on the front line and providing valuable information and

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**- Riana Barnard,
Best Practices Research Analyst**

feedback to supervisory and administrative staff. In an era defined by an increased focus on uninterrupted service delivery and enhanced business agility, FSM plays a central role in helping businesses achieve superior business performance and maintain a competitive edge. Frost & Sullivan believes that the global FSM market will maintain its growth momentum in the coming years. By incorporating next-generation tools, technologies, and platforms such as fifth-generation technology (5G), artificial

intelligence (AI), blockchain, edge computing, and faster mobile computing, modern FSM solutions will become a force multiplier for digital businesses.

In a highly competitive market, larger adjacent companies look to acquire and absorb traditional FSM providers because they recognize the synergies between their core products and FSM solutions.

In particular, enterprises operating in the customer relationship management (CRM), fleet management, asset management, and enterprise resource planning (ERP) space understand the value of advanced FSM capabilities. However, they often lack the expertise or do not purposefully invest in developing these solutions.

The role of field service is evolving from that of a strict cost center to more of a revenue generation opportunity. FSM solutions function as a key enabler in this regard, with the potential to leverage increased automation and intelligence to create new revenue streams and differentiate more effectively in the highly competitive FSM environment. The key drivers for the FSM market include the following:¹

- Positive financial impacts—including increased worker productivity, enhanced cash flow, expedited response times, and improved compliance—result in measurable return on investment and showcase the application’s strong value-add.
- The Software-as-a-Service (SaaS) subscription pricing model is typically more affordable and neutralizes a key barrier to purchase.
- Seamless integration with relevant systems and services results in higher-quality analytics and guidance.
- Vertical-specific solutions directly address field needs and sharpen the application’s value proposition.
- The increased power and lower latency of 5G networks enable market participants to introduce cutting-edge capabilities and attract new users.

While the range of field-centric worker app capabilities continues to grow, features cover mobile forms and workflows, checklists, video streaming, mobile payment, predictive analytics, customer history, wireless timecards, reports, and dashboards.²

Foresight with Insight: Comarch Blends Knowledge Breadth with Strategic Depth

Founded in 1993 and headquartered in Kraków, Poland, Comarch provides innovative information technology (IT) solutions for companies across multiple industries, including telecommunications (telecom), banking and financial services, airlines, retail, healthcare, public administration, and oil and gas. From its inception at the Faculty of Computer Science, Electronics and Telecommunications, AGH University of Science and Technology in Poland, and initially led by a visionary professor who employed a few students, Comarch’s core strategy always centered around creating its own products.

Today, this philosophy, i.e., building its IT solutions portfolio in-house for faster implementation and easier integration, is still a critical success factor. Notably, 93% of Comarch’s revenues come from its proprietary software solutions and product sales.

As a leading IT systems provider, Comarch has implemented thousands of projects during the past three decades, developing a deep understanding of customers’ needs and the technology they use to shape

¹ *Automation and Artificial Intelligence Propel North American Mobile Field Service Management (FSM) Market* (Frost & Sullivan, October 2022)

² *Wireless Carriers Leverage Industry-specific Products and Expertise to Compete in the North American Field-Centric Worker applications Market* (Frost & Sullivan, May 2022)

solutions that meet and exceed their expectations. The company is perfectly positioned to help extend its systems for customers that require supporting field workers.

Comarch's competitive strength lies in its people. For example, more than 80 research and development engineers in the mobile FSM segment galvanize the company's innovation drive. To this end, Poland remains the heart of its FSM development initiatives, where expert teams pioneer high-quality, customized solutions to achieve measurable impact for businesses in the ever-evolving, technology-driven landscape.

Competitive Edge through Unique Strategies

Frost & Sullivan firmly believes that mobile FSM solutions are most helpful when integrated with frequently used third-party services and/or a customer's relevant backend systems, such as ERP, inventory, accounting/payroll, enterprise asset management, fleet management, and CRM. Building upon its strengths in the market, Comarch has extended its service scope by offering FSM capabilities to clients who need support for field engineers with 25 000 users worldwide. For example, in synergy with Comarch

“Telecom operators can increase automation and optimization by integrating Comarch's FSM capabilities within their existing systems, configuring chosen FSM models to meet their specific needs. Equipped with extensive experience and a deep understanding of the environment, Comarch delivers standards-based solutions that can be implemented with ease and add value from day one. The adoption of Comarch FSM by leading telecommunication service providers is a clear testament to the capabilities of its software suite.”

**- Vikrant Gandhi,
Vice President: ICT Research**

ERP systems, approximately 350 active users in Poland integrated mobile services into their portfolio, while 500 existing German customers adopted field services. Thus, Comarch's customer base benefits from the company's comprehensive workforce and asset management solution for all field activities, including automatic scheduling, technician assignment based on availability and required skills, route optimization, equipment allocation, tracking, service level agreements, and reporting. Importantly, Comarch has taken the lead in creating and perfecting vertical-specific FSM solutions and

services, which has helped the company become a preferred provider of mobile FSM solutions in the region.

The company's FSM delivery models are part and parcel of its success. By offering more excellent choices to businesses regarding how they want to deploy, use and manage their FSM, Comarch enables each organization to use the solution best fit for their unique requirements. It offers four options to its telecom, enterprise, and small to medium-sized business clients: reusing Comarch data centers with managed services; a SaaS option delivered on Comarch cloud (with private or multitenant cloud alternatives); a hybrid version hosted by third-party cloud providers (e.g., AWS or Azure), or on-premise implementation reusing customers' data centers.

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out-of-the-box integrations with operations support systems (OSS) and business support systems. The adoption of Comarch FSM by leading telecommunication service providers is a clear testament to the capabilities of its software suite.

Catering to enterprise clients who require migration and integration capabilities and a scalable platform approach, Comarch renders a broad spectrum of features, including a real-time scheduling engine, dedicated OSS mobile apps for inventory (locations and devices) or assurance and new capabilities (i.e., rollout manager for adaptive project management). Furthermore, its SaaS model supports a business case for affordable deployment and maintenance, helping enterprise clients accelerate their digital transformation journey.

Comarch's cloud clients are primarily small companies from various sectors; hence, they demand quick onboarding and self-guided demonstrations while appreciating a CRM platform approach. Meeting (and often exceeding) these expectations, Comarch provides a stable product with self-configuration properties and market-proven multitenancy, elevated by seamless and efficient onboarding. Its preventative maintenance feature, for instance, incorporates a ready-made preconfigured process.

Frost & Sullivan commends Comarch for bridging a market gap and purposefully building its brand across new territories, pursuing new opportunities in multiple industries, such as telecommunication, services, gas and oil, healthcare, and automotive.

Roadmap to Success: Customer-centric, Continuous, Proactive

Comarch's approach goes beyond its extensive expertise and best-in-class capabilities, with customer value as a strategic imperative. Frost & Sullivan commends Comarch for its razor-sharp focus on helping customers achieve measurable results, assessing how it works against defined and business-relevant key performance indicators, and perfecting the art of ultra-responsiveness to emerging customer needs. Unlike competitors, Comarch builds and improves its FSM portfolio by collaborating closely with various stakeholders and partners to evolve alongside market needs and trends. Because it is hard to predict customers' expectations, follow business needs, and grasp each client's specific requirements, its POC-driven evolution allows the company to accelerate time-to-market and receive validation. This distinctive closed client feedback loop enables Comarch to improve its product offering continuously. Moreover, the company is constantly working with clients on new features, including an account-based customer portal, a marketplace for subcontractors, parts prediction, hands-free operations for technicians via virtual reality or voice control, weather forecast integration, AI/ML chatbots, and AI/ML-enabled image fault recognition. This customer-led development process empowers Comarch to drive revenue by acquiring clients from undiscovered areas.

A Promising Outlook for 2023 and Beyond

Since its listing on the Warsaw Stock Exchange in 1999, Comarch's sterling reputation and customer-centric framework led to its coveted preferred partner status. Over the years, it has grown its workforce to 7,100 employees and expanded its footprint across continents to encapsulate 59 subsidiaries that cover operations in over 100 countries. Offering a vast array of solutions and services, Comarch differentiates itself through its expertise in telecommunications, ERP business management systems, information security, CRM, and sales support systems while providing network infrastructure management and

Internet of Things (IoT) solutions along with data analytics and business intelligence. Upcoming enhancements, such as weather forecast integration, a marketplace for subcontractors, parts prediction, an account-based customer portal, and AI/ML-enabled chatbots, will reinforce the company's competitive advantage to accelerate its growth.

Frost & Sullivan believes the company is well-positioned to drive the field service management space into its next growth phase, capturing market share and sustaining its leadership in the coming years.

Conclusion

Frost & Sullivan believes that innovation and growth opportunities drive future success; many factors contribute, yet having a competitive strategy is critical. Comarch understands this core concept and is leading the field service management (FSM) market due to its focused approach helping it to outpace competitors. Building upon its strengths as a leading enterprise resource planning systems provider and leveraging its extensive experience and deep understanding of the telecommunications process, Comarch offers its solid customer base outstanding mobile FSM capabilities. It allows customers to navigate unpredictability and uncertainty in a volatile, hyperconnected world. Following a locally-defined strategy, the sophisticated research and development engineering team all over Poland advances the company's innovation drive to ensure long-term growth. Comarch generates 93% of its revenues from its proprietary software solutions and product sales, which testify to its unique strategies' success and excellent implementation. Overall, Comarch develops and executes its strategy with its clients in mind, securing its position as a trusted partner and market leader.

With its strong overall performance, Comarch earns Frost & Sullivan's 2023 European Competitive Strategy Leadership Award in the mobile field service management industry.

What You Need to Know about the Competitive Strategy Leadership Recognition

Frost & Sullivan's Competitive Strategy Leadership Award recognizes the company with a stand-out approach to achieving top-line growth and a superior customer experience.

Best Practices Award Analysis

For the Competitive Strategy Leadership Award, 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 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

