NETSCOUT

2025 COMPETITIVE STRATEGY LEADER

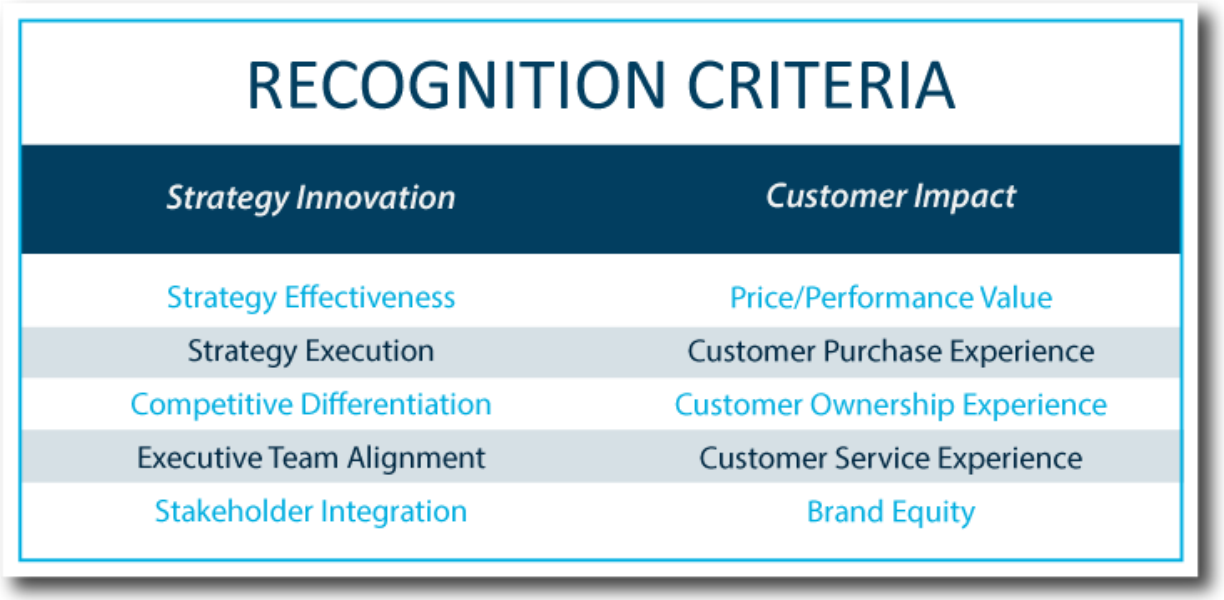
Transforming Innovation Into High-Growth Performance and Competitiveness

RECOGNIZED FOR BEST PRACTICES IN THE GLOBAL NEXT GENERATION VISIBILITY PLATFORM INDUSTRY

FROST & SULLIVAN

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.



RECOGNITION CRITERIA

Strategy Innovation	*Customer Impact*
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

The Transformation of the Application and Network Visibility Industry

The application and network visibility industry has rapidly evolved to address the escalating complexity of the cybersecurity threat landscape in the multi-cloud era. As enterprises embrace hybrid and distributed environments, the need for deep, real-time visibility into network traffic has become critical. Traditional focus on north-south traffic is no longer sufficient; understanding east-west flows—spanning lateral movement within networks—is crucial to identifying threats like ransomware, which often operates in plain sight, encrypted within legitimate traffic.

Advanced threats, including ransomware, now use obfuscation techniques to blend into normal network activity, evading traditional defenses. Solutions offering deep packet inspection, behavioral analytics, and AI-driven insights provide enterprises with actionable intelligence to detect and respond to hidden anomalies. This holistic visibility, spanning applications and infrastructure, enables organizations to reduce risks, improve performance, and maintain trust in increasingly digital-first operations. Building and offering this capability for some of the largest organizations in the world requires tremendous engineering and companies like NETSCOUT have transformed the visibility space by building next generation products.

© Frost & Sullivan 2025

Strategy Effectiveness

NETSCOUT has adopted a platform approach to providing next generation visibility solutions for its customers, building on its established portfolio of products. The company's "Visibility Without Borders" strategy, launched in 2023, has proven effective in solidifying its position in the network visibility and cybersecurity markets. This strategy builds on its portfolio of nGeniusONE, the foundation of the nGenius Enterprise Performance Management solution, providing real time network traffic visibility across all deployments, with the addition of Omnis Cyber Intelligence which uses scalable Deep Packet Inspection (DPI) to enable for real-time threat detection and historical investigation mitigation, and Arbor providing comprehensive DDOS attack detection and mitigation. This gives it the capability of offering a unified visibility platform spanning across cloud, on-premises including remote locations, and hybrid environments. This comprehensive visibility solution appeals particularly to complex organizations, including 90% of the US Fortune 100, seeking consistent monitoring and service assurance across distributed networks.

> "The key differentiator for NETSCOUT lies in its multi-dimensional scalability and deployment flexibility. By supporting both hardware and virtual solutions NETSCOUT empowers large enterprises and government agencies to deploy visibility tools efficiently across diverse infrastructure."
>
> ***- Vinay Biradar***
> ***Principal Consultant, Security Advisory***

The key differentiator for NETSCOUT lies in its multi-dimensional scalability and deployment flexibility. By supporting both hardware and virtual solutions through InfiniStream/CyberStream/Arbor Edge Defense (hardware) and vSTREAM/vCyberStream/vArbor Edge Defense (virtual) products, NETSCOUT empowers large enterprises and government agencies to deploy visibility tools efficiently across diverse infrastructure. This capability is especially relevant for industries like telecommunications, financial services, and federal agencies, where network complexity demands robust and scalable monitoring solutions.

NETSCOUT's effective strategy stems from focusing on breaking down operational silos and enabling data sharing, which supports critical functions such as SecOps, NetOps, and AIOps. This has led to measurable improvements in the Mean Time To Resolution (MTTR) and operational efficiency, as seen by some of its largest customers across telco, BFSI and government sectors.

Overall, NETSCOUT's strategic focus on providing "Visibility Without Borders" has strengthened its market position, expanded customer mindshare, and proven its effectiveness in meeting the evolving needs of digitally complex organizations.

Strategy Execution

NETSCOUT has executed its strategy in the next generation visibility market by leveraging strategic acquisitions, continuous product innovation and securing key client wins. Through its "Visibility Without Borders" approach, NETSCOUT offers comprehensive network visibility across distributed

environments, making it a preferred partner for large enterprises, Communication Service Providers (CSPs), and public sector agencies.

The company has been successful in the market through strategic acquisitions. The acquisition of Arbor Networks expanded NETSCOUT's portfolio into Distributed Denial of Service (DDoS) protection, which is now integrated into their Omnis Network Security solution. This acquisition broadened its reach into cybersecurity while enhancing its network monitoring solutions with advanced threat detection. Similarly, the acquisition of Danaher's Communications division, which included Tektronix Communications, bolstered its service assurance solutions, making NETSCOUT a comprehensive solution for performance and cybersecurity needs.

The company has a clear Go to Market approach with all its products and services addressing some of the largest and most complex organizations in the world. Its clear execution of strategy with a wide product portfolio streamlined towards offering visibility and cybersecurity has enabled it to win the business of 90% of US Fortune 100 companies and numerous global Communication Services Providers (CSPs). This focus on comprehensive, scalable visibility solutions has strengthened NETSCOUT's position in the next generation visibility market.

Competitive Differentiation

NETSCOUT has differentiated itself in the market through product innovation. Its Smart Data technology transforms raw packet data into actionable intelligence. This helps organizations to gather deep insights into network and application performance, as well as security threats, across their entire IT infrastructure. In the Service Assurance business, nGeniusONE is a standout product that offers real time visibility across the IT stack. It helps businesses to reduce downtime through faster troubleshooting and provides comprehensive monitoring to ensure smooth digital migrations. The platform delivers actionable insights and provides cost-effective performance management, which has contributed to NETSCOUT's strong position in the market

In the Cybersecurity domain, NETSCOUT has differentiated itself by integrating network visibility with DDoS protection. Its Arbor Edge Defense solution, featuring AI/ML-powered Global Threat Intelligence and Adaptive DDoS Protection capabilities, addresses the changing DDoS landscape and new attack vector dynamics. This integration has proven attractive to customers across the globe.

Its ability to offer comprehensive visibility into multi cloud environments along with visibility into east-west traffic for cybersecurity and service assurance and monitoring has been a significant competitive differentiation and it continues to serve it well in winning large deals across enterprises and telecom providers

Customer Ownership Experience

NETSCOUT's customers consistently value its next generation visibility products for their ability to simplify operations, enhance performance and deliver reliable outcomes across complex IT deployments. The customer ownership experience of NETSCOUT's products and services is defined based on key outcome-based product values:

1. Improved Network Performance and Reliability: Customers have highlighted NETSCOUT's ability to reduce Mean Time to Resolution (MTTR) by up to 80%, significantly enhancing operational efficiency.
2. Comprehensive Visibility Across Environments: NETSCOUT's ability to provide end-to-end visibility across cloud, data center, and edge environments empowers organizations to monitor service dependencies and application performance, detect vulnerabilities and cyberthreats, and mitigate DDoS attacks ensuring high quality user experiences even in highly distributed environments
3. Customer Centric Support: NETSCOUT has differentiated itself with proactive support services and consistent R&D investments that have helped enhance customer trust.

NETSCOUT has focused on delivering immediate performance gains along with meeting long-term IT modernization goals of its customers and that has helped it to showcase its value to its customers.

Customer Service Experience

NETSCOUT is known for its customer service and robust technical assistance for its diverse clientele. Its support infrastructure includes the Global Technical Assistance Centre (GTAC), which provides customers with immediate access to a pool of over 250 engineers. This has been invaluable for its customers in troubleshooting and optimizing the deployment of NETSCOUT products, which has helped them to maximize their ROI.

> "NETSCOUT's ability to offer comprehensive visibility into multi cloud environments along with cybersecurity and service assurance and monitoring has been a significant competitive differentiation and it continues to serve it well in winning large deals across enterprises and telecom providers."
>
> ***- Vinay Biradar***
> ***Principal Consultant, Security Advisory***

The myNETSCOUT portal further enhances customer experience by offering online access to comprehensive resources, including documentation and training videos. This portal serves as a centralized hub for customers to manage their deployments, access the latest product updates, and engage with NETSCOUT's support team for any technical assistance required. NETSCOUT's differentiation to customer service is seen in its MasterCare support, which provides dedicated on-site or remote engineers to maintain customer environments. This is designed to ensure that NETSCOUT solutions are optimally configured and maintained, reducing downtime and enhancing operational efficiency.

The company has further strengthened its customer service through its Premium Support Engineer (PSE) program. This provides hands-on support and training, ensuring that customers can fully leverage the capabilities of NETSCOUT's solutions. This personalized approach has been effective in helping organizations quickly identify and resolve network issues, thereby maintaining high standards of service quality. For 24x7 management of their nGenius solution and quick time to value, customers can optionally leverage the innovative NETSCOUT Visibility as a Service (VaaS) service and support option. This provides organizations continuous oversight of their environment by support experts for early intervention into problems, even when their IT team is at rest.

NETSCOUT has been consistent in providing the right solutions for its customers and aligning technology with customer goals. Customer feedback has often been highlighted with the company's proactive approach, scalable solutions and expertise in addressing modern IT challenges.

Brand Equity

NETSCOUT has strategically invested in its brand equity through continuous product innovation and expanding its customer base. Its Omnis Cyber Intelligence and nGeniusONE platforms address critical challenges for enterprise customers like multi-vendor network complexity and cybersecurity threats. These solutions have been pivotal in enhancing the company's reputation as a forward-thinking brand that empowers customers to optimize their IT operations and secure their infrastructure

Customer trust in NETSCOUT's offerings is another cornerstone of its brand equity. The company's focus on reducing Mean Time to Resolution (MTTR), improving operational efficiency, and ensuring consistent service delivery has fostered strong customer loyalty. High-profile clients, including 90% of Fortune 100 companies, underscore the brand's credibility and influence. One of its customers, which is a large state-owned multinational bank, was able to reduce its MTTR from 2 days to just 3 hours using nGeniusONE performance management solutions.

Additionally, NETSCOUT's integration of AI/ML, cloud-native solutions, and partnerships with leading providers like AWS, Cisco/Splunk, Palo Alto Networks and VMware have reinforced its image as an innovative and reliable partner for digital transformation. Through these efforts, NETSCOUT has effectively built and sustained a strong brand that resonates with both its existing and potential customers, ensuring its continued growth and market leadership.

Conclusion

NETSCOUT is well positioned to lead with its competitive strategy in the next generation visibility market due to its strong product innovation, strong brand equity and proven customer value. Its "Visibility without Borders" strategy enables seamless observability across hybrid and multi-cloud environments, addressing the complexities of modern IT infrastructure. With continued innovation, commitment to customer success and market expansion into 5G and multi-cloud network visibility, the company is poised is poised for sustained growth and leadership. With its strong overall performance, NETSCOUT earns Frost & Sullivan's 2025 Global Competitive Strategy Leadership Award in the Next Generation Visibility Platform industry.

What You Need to Know about the Competitive Strategy Leadership Recognition

Frost & Sullivan's Competitive Strategy Leadership 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 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

Benefits & Impact

Receiving a Best Practices Recognition allows recipients to take a step back and reflect on their achievements and celebrate them. Many might be at the very beginning of that journey, and for some, this comes as validation of years of hard work. We take pride in helping these trailblazers promote their recognition and showcase how Best Practices Recognition recipients are changing the world.

This recognition results from many individuals making daily critical decisions to support your organization and contribute to its future. Frost & Sullivan enthusiastically acknowledges and celebrates their contributions.

Flexing Your BICEP for Growth

Are your stakeholders fully engaged and inspired?

- **B** **Board of Directors** - Setting Agenda for Transformation Growth Strategy
- **I** **Investors** - Increasing Buy-side Demand from an Industry Analyst Perspective
- **C** **Customers** - Spark Confidence, Loyalty, and Engagement
- **E** **Employees** - Inspire Team to Drive Competitive Strategy and Customer Value
- **P** **Partners** - Building a Powerful Growth Ecosystem of Best-in-Class 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 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:

- Megatrend (MT)
- Business Model (BM)
- Technology (TE)
- Industries (IN)
- Customer (CU)
- Geographies (GE)

