NSFOCUS

2025 COMPETITIVE STRATEGY LEADER

Transforming Innovation Into High-Growth Performance and Competitiveness

RECOGNIZED FOR BEST PRACTICES IN THE ASIA-PACIFIC ANTI-DDOS INDUSTRY

FROST & SULLIVAN

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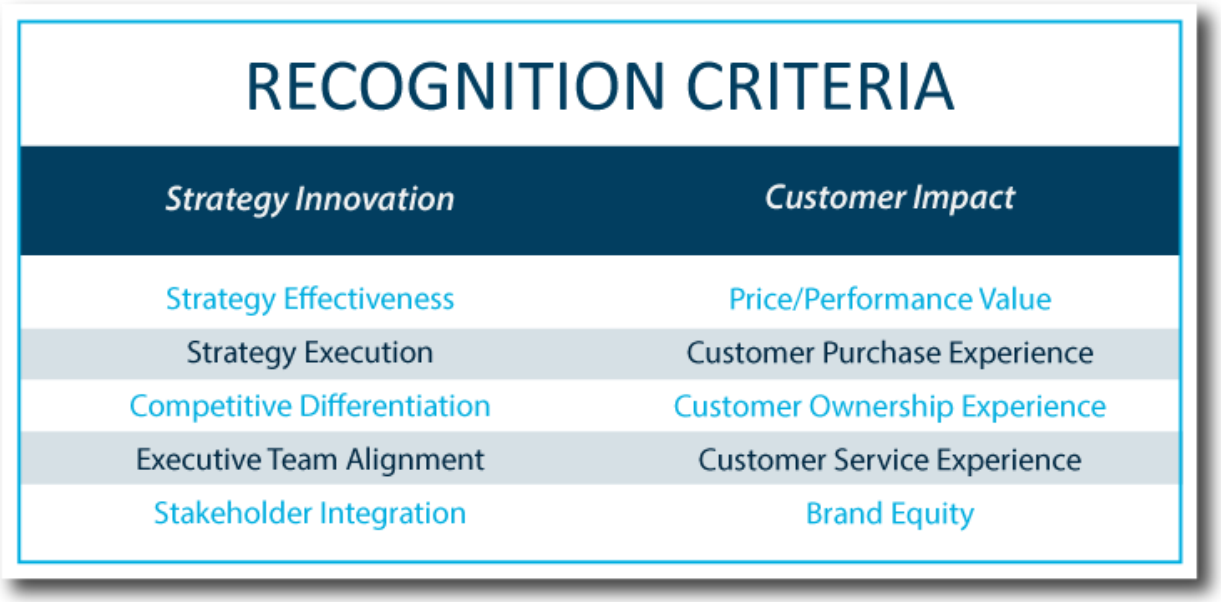
Best Practices Criteria for World-class Performance

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. NSFOCUS excels in many of the criteria in the anti-DDoS space.



NSFOCUS: Technology-driven, Customer-centric, and Agile

Established in 2000 and headquartered in Beijing, NSFOCUS Technologies Group Co., Ltd., (NSFOCUS) is a leading internet and application security company offering a comprehensive suite of cybersecurity products, integrated security solutions, and systematic security operations services. The company is advancing towards becoming a top-notch Chinese cybersecurity brand with its broad global footprint, boasting subsidiaries in the United States, Japan, the United Kingdom, Brazil, and Singapore, alongside 40 branches across China. NSFOCUS has over 5,000[1] employees, with more than 2,200 dedicated to technical roles, empowering it with the optimum scalability and expertise to serve many industries, including telecommunications (telecom), finance, energy, government, education, and healthcare. It protects four of the 10 largest global telecoms and four of the five largest global financial institutions.[2]

NSFOCUS delivers full-spectrum cybersecurity capabilities, positioning itself as a trustworthy partner for businesses facing the challenges of the evolving threat landscape. The company's integrated approach helps customers experience digital transformation with confidence. Emphasizing five core values (responsibility, professionalism, teamwork, innovation, and mutual growth), NSFOCUS has built a solid business framework, ensuring customers' business continuity.

NSFOCUS's dedicated research and development (R&D) team specializes in vulnerability analysis, threat intelligence, and security intelligence. The company's continuous investment in R&D helps customers

[1] NSFOCUS Anti-DDoS Solution (NSFOCUS, April 2025)
[2] https://nsfocusglobal.com/company-overview/about/

maintain operational continuity and keeps their business systems online. It delivers advanced cybersecurity through a multitenant, distributed cloud security platform that secures the internet backbone. With operations in data centers worldwide, NSFOCUS enables organizations to fully leverage cloud computing with outstanding security and performance. The company's technology allows its partners to offer high-quality and simplified security-as-a-service. The all-encompassing, carrier-grade, hybrid distributed denial-of-service (DDoS) and web security are powered by cutting-edge threat intelligence.

Advanced, Scalable, and Cost-Effective DDoS Protection

The Asia-Pacific (APAC) anti-DDoS market is highly competitive, with global cybersecurity leaders, local vendors, and cloud-native anti-DDoS services all competing for market share. With enterprises progressively adopting cloud or hybrid environments, the challenges of integrating on-premises solutions with cloud-based DDoS protection are also increasing. Solution providers must stand out based on technological excellence, service quality, and cost-effectiveness.

> *"Frost & Sullivan acknowledges that NSFOCUS's intelligent, agile, and customer-centric solutions stand out in an industry combating increasingly sophisticated and large-scale DDoS threats. The company's holistic, innovation-driven strategy positions it as a competitive force in APAC's cybersecurity landscape. Its integrated anti-DDoS solutions facilitate measurable customer value and help businesses unlock new monetization opportunities."*
>
> ***- Iqra Azam***
> ***Best Practices Research Analyst***

Internet connectivity's rapid expansion enriches convenience and productivity, but it also leads to more DDoS attacks. The economic losses precipitated by these attacks escalate annually, impacting enterprise revenue and credibility. A high number of unsecured Internet of Things devices intensifies DDoS attacks' scale and frequency. Moreover, cybercrimes are becoming more advanced, with attackers being able to initiate DDoS attacks through low-cost, subscription-based, software-as-a-service solutions. Given this landscape, there is a need for comprehensive, multilayered DDoS protection and control to ensure service availability.

On-Premises DDoS Defenses: Bridging Industry Gaps

Considering the industry gaps, NSFOCUS developed its game-changing On-Premises DDoS Defenses, a holistic suite of components: Network Traffic Analyzer (NTA), Anti-DDoS System (ADS), and Anti-DDoS System Manager (ADS-M). NTA is a DDoS detection appliance that flags attacks through traffic flow monitoring. ADS is a stateless DDoS mitigation appliance that prevents unwanted, malicious traffic. ADS-M, a multitenant management system, offers centralized management and reporting and includes a web-based customer portal.[3]

Harnessing over two decades of globally recognized frontline protection and research experience, NSFOCUS's On-Premises DDoS Defenses rapidly protect against volumetric, application, and web application attacks, including Domain Name System (DNS), carpet-bombing, hypertext transfer protocol

[3] *On-Premises-DDoS-Defenses-Datasheet*
https://nsfocusglobal.com/wp-content/uploads/2024/11/On-Premises-DDoS-Defenses-Datasheet-241101.pdf

secure (HTTPS) floods, user datagram protocol/transmission control protocol amplification attacks, and low and slow attacks. Unlike competing products, NSFOCUS's defenses do not require additional web application firewall modules to neutralize web application attacks, streamlining operations, simplifying security and management, and increasing cost efficiency.

ADS ensures fine-grained security, integrating uniform resource locator-based protection and tailored personal computer and application traffic protection. NSFOCUS's game-changing solution is the optimal choice for continuously evolving DDoS attacks, boasting customer benefits that conventional solutions cannot duplicate. Powered by stateless detection technology, ADS has no limitation on the number of concurrent DDoS attack traffic sessions, enabling scalable, robust defense.

Both ADS and NTA complement NSFOCUS Threat Intelligence (NTI), mitigating botnet-based attacks. ADS is installed at the customer's network ingress point, while NTA and ADS-M can be deployed anywhere in the network. NSFOCUS's ADS series incorporates models ranging from 200 megabits per second to 1 terabit per second (Tbps) of DDoS mitigation capacity, offering flexible licensing and allowing users to subscribe to required mitigation capacity. For large-scale, demanding network environments, ADS can be positioned as a cluster to protect against extremely high-volume and application-layer DDoS attacks.

NSFOCUS also offers easy-to-implement, virtualized versions of ADS, NTA, and ADS-M, helping customers reduce capital expenditure.[4] NTA equips customers with real-time threat detection across border, core, and edge routers through deep packet and deep flow inspection. Users can choose from different detection models to tackle the constantly evolving threat landscape. NTA's built-in traffic auto-learning function analyzes the network environment and adapts the appropriate thresholds of detection policies, delivering precise, context-aware security. As an innovative, multistage DDoS detection engine, NTA has over 30 vectors to detect DDoS traffic from other traffic streams.[5]

Alongside the central configuration of ADS and NTA, NSFOCUS's ADS-M provides detailed reports and real-time monitoring dashboards. Its advanced design enables administrators to observe traffic and attack conditions from the tenant's perspective and globally through multidimensional graphical displays. ADS-M's extensive reporting capabilities "include information on attack types, attack targets, protocols, ports, network status, alert information, device logs, and more,"[6] ensuring visibility across all critical network security areas. ADS-M also features an adaptable customer portal for managed DDoS services providers, helping them offer web-based access to their customers for traffic analysis, reporting, and analytics. This AI-driven smart protection module helps users automatically create suitable protection policies without extra operational overhead.

ADBOS: Galvanizing Unmatched Customer Value

Another transformative innovation in NSFOCUS's offerings is its all-in-one Active Defense Business Operating System (ADBOS). It is a smart traffic scrubbing scheduling platform for integrated management of all on-premises Anti-DDoS devices and cloud services. ADBOS operates through a user-friendly, self-service portal, making broader customer management easier. Based on the Role-Based Access Control

[4] Ibid.
[5] https://nsfocusglobal.com/products/anti-ddos-system-ads/
[6] *On-Premises-DDoS-Defenses-Datasheet*
https://nsfocusglobal.com/wp-content/uploads/2024/11/On-Premises-DDoS-Defenses-Datasheet-241101.pdf

(RBAC) model, the system supports customer-specific branding and corporate identity integration alongside granular permission controls based on user, group, or role, catalyzing unique client experiences. ADBOS's architecture empowers flexible configuration, equipping every customer with an independent system for traffic monitoring, scrubbing, and scalability as their network demands evolve. As an adaptable, virtualized system that needs minimal investment, ADBOS covers all ADS models and supports multiple vendors through plug-ins. Its tangible customer benefits are a testament to NSFOCUS's technological excellence. Customers experience improved business growth and operational efficiency, reducing the response time from hours to minutes, cutting labor costs by 50%, limiting the mitigation escalation process, and enabling user self-service mitigation.[7]

ADBOS features fundamental web application and application programming interface protection (WAAP) services and advanced security services, including external attack surface management, penetration testing-as-a-service, and digital risk protection service. Leveraging robust visualization and customizable reporting capabilities, ADBOS empowers customers to enrich their security management capabilities. Its web portal facilitates global statistics, customer management, resource management, resource scheduling, and threat landscape visualization, and the customer portal entails attack alerts, traffic diversion and mitigation, order information, and service availability.[8]

From a business standpoint, one of ADBOS's most compelling features is its RBAC-based framework, helping administrators define billing models and service specifications and manage access rights for their hosting customers. With deployed anti-DDoS devices, ADBOS enables service providers to resell DDoS mitigation as a managed service and create new revenue streams while bolstering security for their end customers.

NSFOCUS's rich product portfolio incorporates a Magic Flow (MF) Integrated Network Governance Platform and a Flow Load Balancer (FLB). MF merges extensive, high-fidelity, behavior-based network analysis capabilities with monitoring visibility, traceability, and threat intelligence. The FLB centrally collects network flow traffic and distributes it across multiple NTA devices, boosting the performance of the network traffic analysis solution. NSFOCUS's anti-DDoS solution also facilitates Cloud DPS (a cloud DDoS protection service against the largest DDoS attacks), an outbound mitigation solution, managed security services, encrypted traffic mitigation, and a Border Gateway Protocol Flow Specification solution.

NSFOCUS's on-premises solutions integrate multiple protective algorithms for encrypted traffic, including JA3 fingerprint and behavior pattern detection, mitigating threats even in encrypted environments.

Frost & Sullivan acknowledges that NSFOCUS's intelligent, agile, and customer-centric solutions stand out in an industry combating increasingly sophisticated and large-scale DDoS threats. The company's holistic, innovation-driven strategy positions it as a competitive force in APAC's cybersecurity landscape. Its integrated anti-DDoS solutions facilitate measurable customer value and help businesses unlock new monetization opportunities.

[7] *NSFOCUS_ADBOS-datasheet*
https://nsfocusglobal.com/wp-content/uploads/2023/10/NSFOCUS_ADBOS-datasheet-20231023-1.pdf
[8] NSFOCUS Anti-DDoS Solution (NSFOCUS, April 2025)

Strategic Initiatives Driving Competitive Advantage

With an unwavering commitment to customer success, NSFOCUS continuously optimizes its offerings to drive an outstanding experience at every touchpoint. For example, it has flexible pricing models to accommodate businesses of all sizes. The company's diligent product teams persistently augment hardware and virtual solutions for solid performance at competitive pricing. Its scrubbing centers across APAC increase mitigation capacity and minimize latency and downtime for WAAP services, ensuring uninterrupted operations.

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- Vivien Pua
Senior Industry Analyst, Cybersecurity

In 2024, the company updated its anti-DDoS solution with key protection policies to address the increase in botnet and carpet-bombing attacks. The new ADS F05 version offers full mitigation and protection against these advanced threats. F05 now includes non-decrypted HTTPS traffic protection. Despite over 99% of web traffic being encrypted, decryption on ADS remains a problem. Telecom providers usually do not have access to their end users' certificates, and full decryption on ADS is operationally complex and resource-heavy. With F05, ADS now analyzes HTTPS traffic without decryption through advanced detection algorithms based on traffic signatures and statistical analysis. This upgrade empowers accurate threat detection, does not compromise system resources, and delivers optimum results.[9]

Another key differentiator for NSFOCUS is its Secure Sockets Layer and Transport Layer Security keyword checking feature for non-decryption HTTPS scenarios. This feature integrates JA3 and JA3S fingerprinting to inspect encrypted traffic. JA3 fingerprints identify different traffic sources and the sending software, and JA3S fingerprints, derived from the server hello message, help block HTTPS attacks that slip past conventional defense mechanisms. NSFOCUS can customize rules to drop or rate-limit malicious JA3 fingerprints linked to attacks. Conversely, if legitimate traffic gets blocked by current defenses, NSFOCUS can whitelist trusted JA3 fingerprints to restore normal access without compromising security. Further strengthening its offerings, the company has revamped its DNS protection algorithm, introducing six algorithms to better address diverse operational scenarios.[10]

In addition to proactive product upgrades and innovation, NSFOCUS sustains growth by investing in machine learning (ML) and artificial intelligence (AI)-driven algorithms that enhance real-time anomaly detection, automate threat response, and reduce false positives. The company also synergizes with internet service providers (ISPs), managed security service providers (MSSPs), and cloud service providers to facilitate localized, customer-centric solutions. With a commitment to sustainability, NSFOCUS equips customers with an energy- and cost-efficient, hardware-optimized anti-DDoS solution that bolsters their

[9] Frost & Sullivan's Interview with NSFOCUS (April 2025)
[10] Ibid.

network infrastructure protection. It delivers high performance at lower costs and enables customers to achieve better returns on their security investments. NSFOCUS's forward-looking practices have made enterprise-grade DDoS protection more accessible to small and medium-sized businesses and cloud-native organizations. The company attracts large enterprises, MSSPs, and ISPs by expanding its cloud scrubbing centers across APAC.[11]

NSFOCUS effectively executes its competitive strategies through regional collaborations. For example, it partnered with Converge ICT, a Philippines-based ISP, to establish a regional scrubbing center in the Philippines for quicker attack mitigation and decreased latency. This development considerably boosts service quality, positioning Converge ICT to provide premium anti-DDoS services to enterprises. Capitalizing on NSFOCUS's game-changing technology, the ISP uses AI-powered anomaly detection to curtail manual intervention and optimize response time. To ensure excellence on all fronts, NSFOCUS fosters a highly integrated operational model, promoting cross-functional collaboration across its R&D, marketing, sales, corporate strategy, customer support, operations, and service delivery teams. The teams regularly communicate to exchange insights, customer feedback, market intelligence, product performance data, and technical support. This approach allows NSFOCUS to maintain organizational agility and respond to market trends and evolving customer requirements in real time. For instance, when the R&D team identifies a new type of attack, marketing can promptly adjust its messaging to emphasize the company's advanced protection capabilities, and sales can target customers most susceptible to the new threat. This feedback and response loop fortifies NSFOCUS's competitive edge and helps it acquire more customers.

NSFOCUS cultivates a culture of innovation through interdepartmental workshops and brainstorming sessions, encouraging teams to generate innovative ideas, analyze market trends, and align business strategies. Its innovation hubs allow employees to experiment with new ideas, emerging technologies, business models, and trends, including cloud security, AI-enabled defenses, and quantum-safe encryption. This approach positions NSFOCUS as an industry pioneer.

Unmatched Customer Experience Fosters Exponential Growth

NSFOCUS's customer-first approach catalyzes unparalleled service experience, leading to high satisfaction and longstanding relationships. The company offers 24/7, multilingual customer support across APAC, with dedicated support teams that tackle region-specific challenges and incidents with swift, tailored responses. Its security operations center team regularly collects customer feedback through satisfaction surveys, assessing critical elements of the service experience, including response time, issue resolution, and overall satisfaction. The company also openly and closely communicates with customers through email, phone, live chat, and social media. Following issue resolution, the customer support team follows up to confirm user satisfaction. NSFOCUS conducts regular internal audits of its customer service processes to ensure compliance with service-level agreements and enrich service delivery.

NSFOCUS's commitment to providing a personalized user experience results in higher customer retention and revenue growth. Satisfied clients return for repeat business, explore additional offerings, and recommend NSFOCUS to others.

[11] Ibid.

Conclusion

Harnessing 25 years of industry experience and a global presence, NSFOCUS has firmly established itself as a leader in the APAC cybersecurity industry. Emphasizing a commitment to innovation, customer success, and holistic threat mitigation solutions, the company addresses unmet customer needs and tackles complex challenges precipitated by the shifting threat landscape. Its all-encompassing suite of cybersecurity products, integrated security solutions, and security operations services empowers customers across various industries. Strategic R&D investments bolster its competitive advantage, with improvements in real-time threat intelligence, DDoS mitigation, and cloud security. NSFOCUS fortifies its industry position through collaborations, offering localized solutions tailored to customers' unique requirements.

The company's customer-centric mindset fosters high retention and satisfaction rates, catalyzing lasting relationships while achieving stronger financial performance. Its outstanding business model, which integrates game-changing technology and an excellent customer experience, helps it deliver measurable benefits that competitors cannot replicate.

With its strong overall performance, NSFOCUS earns Frost & Sullivan's 2025 Asia-Pacific Competitive Strategy Leadership Recognition in the anti-DDoS industry.

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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

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)

