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20 25 | COMPANY OF THE YEAR

Driving impact across the customer value chain

RECOGNIZED FOR BEST PRACTICES IN THE JAPANESE PRIVILEGED ACCESS MANAGEMENT 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. NTT TechnoCross excels in many of the criteria in the privileged access management (PAM) space.

RECOGNITION CRITERIA

Visionary Innovation & Performance	Customer Impact
Addressing Unmet Needs	Price/Performance Value
Visionary Scenarios Through Megatrends	Customer Purchase Experience
Leadership Focus	Customer Ownership Experience
Best Practices Implementation	Customer Service Experience
Financial Performance	Brand Equity

The Transformation of the Privileged Access Management Industry

Japan's PAM market is positioned for steady growth, driven by an evolving threat landscape, tightening regulatory requirements, and the rapid pace of digital transformation. As businesses in Japan expand their cloud and hybrid infrastructures, safeguarding privileged identities—ranging from human to machine accounts—becomes increasingly important. The global PAM market, valued at approximately US$1.82 billion in 2023, is projected to reach US$4.86 billion by 2028, growing at a compound annual growth rate of 21.6%. The Asia-Pacific region, particularly Japan, is expected to play a significant role in this growth.[1]

Key drivers in Japan include a rise in cyberattacks and regulatory pressures, with stricter compliance mandates at local and international levels and increasing demands from cyber insurers. As a result, many organizations are adopting PAM solutions that align with zero trust security models and advanced identity protection strategies. Heavily regulated sectors, such as financial services, healthcare, and critical infrastructure, are at the forefront of this movement and integrating PAM with other technologies, including cloud infrastructure entitlement management, identity governance, and identity threat detection and response.

Despite these promising growth prospects, the market also faces several challenges. Budget limitations, particularly the high cost of ownership and ongoing maintenance of traditional PAM solutions, are significant obstacles for smaller organizations. Limited awareness of the strategic benefits of PAM and the complexity involved in its implementation also are barriers to wider

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[1] Frost & Sullivan: Growth Opportunities in the Privileged Access Management Market, Global, 2024–2028

adoption, and some enterprises continue to rely on basic access control tools offered by cloud providers, reducing the demand for stand-alone PAM platforms.

Nevertheless, the PAM market in Japan is poised to benefit from several trends. Organizations are embracing cloud-native PAM solutions, integrating artificial intelligence (AI) and automation to enhance detection and response capabilities. The convergence of PAM and broader identity and access management (IAM) solutions is happening as companies streamline their cybersecurity strategies. As Japanese businesses continue to prioritize resilience, operational agility, and data protection, PAM remains an essential component of their cybersecurity frameworks, positioning the market for sustained growth and innovation.

> *"NTT TechnoCross has effectively aligned its PAM solutions with the latest trends shaping the cybersecurity landscape. By incorporating automation, and real-time threat intelligence, the company ensures that its offerings remain innovative, adaptable, and competitive in an ever-evolving market."*
>
> *- Vivien Pua*
> *ICT Senior Industry Analyst*

NTT TechnoCross: Leading Innovation and Security in Information Technology Solutions

NTT TechnoCross, a wholly owned subsidiary of NTT, Japan's largest telecommunications carrier, is a leader in delivering advanced IT solutions. With headquarters in Tokyo, the company develops and provides market-leading solutions utilizing cutting-edge technologies from NTT's research and development teams. NTT TechnoCross has several specialties, including software development, system integration services, consultation, and networking system services.

Since its establishment in 1985, NTT TechnoCross has played a pivotal role in enhancing its clients' operations by leveraging the advanced technologies developed by NTT Laboratories. Guided by its core mission, "Powering society through advanced technology," the company has made significant contributions across industries in system design, construction, maintenance, and operations, with a focus on ICT system integration. By integrating its expertise in security, cloud, and network technologies, NTT TechnoCross supports a wide range of businesses, helping organizations adopt scalable and efficient solutions.

As a part of the NTT Group, NTT TechnoCross is dedicated to maintaining the highest standards in security, particularly as it builds its brand on secure technologies. With increasing reliance on digital marketing and its website as a key information hub, the company recognizes the importance of robust security measures to prevent cyberattacks that could harm its brand and business continuity. Its advanced PAM solutions align with this commitment by enabling organizations to secure critical systems, manage access efficiently, and ensure compliance in an increasingly complex digital landscape.

Innovative PAM Solutions for Evolving Security Needs

With the growing frequency and sophistication of cyberattacks targeting privileged accounts, NTT TechnoCross's PAM solutions stand out for its advanced capabilities in securing access to critical systems and sensitive data. A standout feature is the seamless integration of advanced monitoring and security capabilities that eliminate the need for a separate security information and event management (SIEM) system. Traditional PAM systems typically require additional SIEM systems to monitor and manage

privileged access logs, which can increase operational complexity. However, NTT TechnoCross centralizes access management and monitoring capabilities in a single solution, simplifying security operations and offering real-time monitoring of privileged access activities. For enterprises looking to streamline security operations, this integration is a significant addition of value because it consolidates various security layers into a unified solution, improving efficiency and visibility across systems.

As organizations move toward cloud environments and hybrid infrastructures, NTT TechnoCross's PAM solutions can handle the complexities that arise from these dynamic IT landscapes. Its hybrid gateway and agent-based PAM solutions allow for more flexible access management strategies, which are especially valuable in environments where traditional gateway-based models may not be applicable. These solutions support environments with restricted access paths, which are often encountered when managing legacy systems or handling configurations where direct access is not feasible. By offering hybrid gateway and agent-based options, NTT TechnoCross gives organizations greater flexibility and adaptability in managing privileged access, allowing them to tailor security protocols to suit specific infrastructure needs.

NTT TechnoCross's focus on comprehensive security extends beyond access management. The company has introduced important features, such as endpoint privileged management (EPM) and session management, which are key components of modern cyber defense strategies. EPM extends the reach of the PAM solution to individual devices, protecting endpoints from privilege escalation and unauthorized access, which are becoming a focal point for cybercriminals. Session management allows businesses to record and track privileged sessions, enabling real-time analysis of access events and swift response times in the event of a security breach. This multilayered approach to securing privileged access at the endpoint and session levels mitigates a variety of security risks associated with cyberattacks targeting an organization's critical access points.

Harnessing Industry Trends for Competitive Advantage

NTT TechnoCross has effectively aligned its PAM solutions with the latest trends shaping the cybersecurity landscape. By incorporating automation, and real-time threat intelligence, the company ensures that its offerings remain innovative, adaptable, and competitive in an ever-evolving market.

> *"By ensuring compatibility with other platforms, NTT TechnoCross's solution contributes to a cohesive security strategy. This integration enhances the efficiency of security operations and better equips organizations to respond to complex, evolving threats from a centralized management platform."*
>
> *- Norazah Bachok*
> *Best Practices Research Analyst*

Threat Intelligence: In a rapidly changing cybersecurity environment, the integration of real-time threat intelligence is crucial for staying ahead of emerging risks. NTT TechnoCross has embedded global threat data into its PAM solutions, enabling businesses to detect unusual access patterns or suspicious activity as it occurs. This integration allows for swift response times, mitigating risks before they escalate into major security incidents. By incorporating threat intelligence, NTT TechnoCross enhances situational awareness, providing valuable context about potential attack vectors. This proactive detection capability strengthens overall security posture and ensures that businesses are prepared to handle evolving threats effectively.

Automation for Efficiency and Scalability: Automation plays a key role in optimizing cybersecurity operations, and NTT TechnoCross has seamlessly integrated this technology into its PAM solutions. By automating routine tasks in PAM, the company reduces manual intervention, minimizes the risk of human error, and enhances system reliability. The integration of IT service management and robotic process automation further streamlines security operations, ensuring that PAM protocols are consistently followed. This approach simplifies the management of privileged access and frees up resources, allowing organizations to focus on more strategic initiatives while maintaining a high level of security.

Holistic Approach and Integration with Other Security Solutions: NTT TechnoCross has positioned its PAM solutions as key components of a broader security ecosystem. By seamlessly integrating with other essential security solutions, such as IAM systems, data loss prevention tools, and encryption platforms, the company enables its clients to take a comprehensive, layered approach to security. This integration strengthens the overall security framework by addressing multiple potential threats across different layers.

In response to the shift toward cloud-based operations, NTT TechnoCross has also expanded its PAM offerings to include a cloud-based software-as-a-service (SaaS) solution that satisfies the demand for scalable, cost-effective, and flexible security. With cloud-based PAM, businesses can reduce the operational costs associated with maintaining on-premises infrastructure while benefiting from high levels of security and performance. The SaaS model also provides the flexibility to scale security measures as the business grows, eliminating the need for significant upfront capital investments.

By ensuring compatibility with other platforms, NTT TechnoCross's solution contributes to a cohesive security strategy that enhances the efficiency of security operations and better equips organizations to respond to complex, evolving threats from a centralized management platform.

Financial Performance and Market Leadership

NTT TechnoCross has demonstrated remarkable financial growth, with revenue of approximately ¥4.4 billion in 2024, reflecting a robust 17% increase from the previous year and highlighting the company's ability to effectively respond to the demand for advanced security solutions in a rapidly changing market.

A major contributor to this success is the company's ability to secure significant contracts. In 2024, NTT TechnoCross achieved a major milestone by securing its largest contract to date in the telecommunications industry, where its PAM solution was adopted as a measure for internal fraud prevention. This success is part of a broader trend, with increasing demand for its PAM solutions across government, energy, and automotive entities. As businesses and public institutions prioritize security due to rising cyber threats, NTT TechnoCross remains a preferred partner for ensuring robust security measures.

The company's financial success is bolstered by its customer-centric approach. NTT TechnoCross relies on client feedback to ensure that its PAM solutions evolve in line with customer needs. The feedback-driven development approach strengthens the company's market position and fosters long-term customer loyalty. Ongoing education and training initiatives ensure that its teams are cognizant of the latest security trends. This commitment enhances internal capabilities and improves the quality of customer support, allowing clients to maximize the value of their PAM solutions.

NTT TechnoCross offers flexible pricing models, including fixed-rate and pay-as-you-go options, making enterprise-level security accessible to businesses of all sizes and allowing smaller organizations to scale their PAM solutions without large upfront investments. The company's dedication to post-purchase support, transparency, and tailored proposals ensures high levels of customer satisfaction and trust. These efforts, combined with strong brand equity, position NTT TechnoCross as the dominant force in the PAM industry.

Conclusion

NTT TechnoCross has strategically aligned its PAM solutions with the key trends shaping the future of cybersecurity. By integrating real-time threat intelligence, and automation, the company offers smarter, more adaptive security systems that anticipate and mitigate threats before they escalate. The systems enhance threat detection and risk prevention, while the incorporation of global threat data ensures that businesses can swiftly respond to emerging risks. Automation streamlines PAM operations, reduces manual errors, and increases efficiency, freeing up resources for more strategic initiatives.

NTT TechnoCross has embraced the shift toward cloud-based solutions by offering a flexible and scalable SaaS model so that businesses can reduce infrastructure costs while maintaining high levels of security. Cutting-edge technologies and a future-proof cloud offering ensure that NTT TechnoCross's solutions are relevant today and prepared for the challenges of tomorrow. This forward-thinking approach positions the company as a leader in cybersecurity, delivering long-term value and security for its clients.

With its strong overall performance, NTT TechnoCross earns Frost & Sullivan's 2025 Japanese Company of the Year Recognition in the PAM industry.

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

Frost & Sullivan's Company of the Year 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 Company of the Year Recognition, 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 to create growth opportunities across the entire value chain

Visionary Scenarios Through Megatrends: Long-range scenarios are incorporated into the innovation strategy by leveraging mega trends and cutting-edge technologies, thereby accelerating the transformational growth journey

Leadership Focus: The company focuses on building a leadership position in core markets to create stiff barriers to entry for new competitors and enhance its future growth potential

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

Financial Performance: Strong overall business performance is achieved by striking the optimal balance between investing in revenue growth and maximizing operating margin

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 fueled 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)

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