

2019 Frost & Sullivan Asia-Pacific
Biometrics
Company of the Year



NEC CORPORATION

**ASIA PACIFIC
BEST PRACTICES
AWARDS**

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We are proud to present you with this year's Award for Company of the Year in the Asia-Pacific Biometrics industry.

Frost & Sullivan's global team of analysts and consultants continuously research a wide range of markets across multiple sectors and geographies. As part of this ongoing research, we identify companies that are true industry leaders, delivering best practices in growth, innovation, and leadership. These companies have a keen eye on the future and drive innovation that meets upcoming needs before they become commonly visible, thereby often being first to market with new solutions. They focus on delivering the best products at optimal prices to maximize customer value and customer experience, which makes them growth leaders in their respective industries. Identifying such companies involves extensive primary and secondary research across the entire value chain of specific products and/or markets. Against the backdrop of this research, Frost & Sullivan is pleased to recognize NEC Corporation as the 2019 Company of the Year in the Asia-Pacific Biometrics industry.

To deliver excellence worthy of the Company of the Year recognition is never an easy task, but it is one made even more difficult considering today's competitive intensity, customer volatility, and economic uncertainty—not to mention the difficulty of innovating in an environment of escalating challenges to intellectual property. Within this context, your receipt of this Award signifies an even greater accomplishment.

Moreover, we recognize that your selection as recipient of this Award is the result of many individuals (employees, customers, and investors) making daily choices to support the organization and contribute in a meaningful way to its future. We enthusiastically acknowledge and celebrate these achievements.

Once again, we congratulate you on your achievements and wish you great success in the future. We are here to support you on any future endeavor.

Sincerely yours,



David Frigstad
Chairman
Frost & Sullivan

Industry Challenges

Today, governments as well as commercial enterprises across the Asia-Pacific (APAC) region are increasingly adopting biometric solutions to ensure safety and security on a broad scale covering not only digital and personal protection but also infrastructure. In this era of technological sophistication and advancement, when terrorism is at an all-time high, biometrics providers are designing solutions that leverage big data and artificial intelligence (AI) algorithms to empower government departments and agencies to accurately detect imposters and dangerous objects in the physical world before they pose a threat to the safety and security of life and property. By quickly collating data from different sources leveraging the Internet of Things (IoT) ecosystem, biometrics solution users are able to gain increased knowledge about the targets at a remarkable pace. This technology also facilitates in the rapid generation of prescriptive insights that help them counter unauthorized entry of imposters across border areas as well as ensure public safety in crowded places such as airports and stadiums. City-wide advanced infrastructure and video surveillance leveraging high definition (HD) cameras enable facial recognition solutions to carry out efficient crowd control by police departments during major events.

In the online world, businesses are steadily embracing digitalization, causing a marked shift in the way transactions are executed. This trend has been triggered by the proliferating uptake of smartphones by users that prefer an uninterrupted connected experience.

With users relying on their smartphones to carry out all sorts of payments, ensuring the security of devices is critical to prevent malicious cyberattacks and theft of sensitive user data for fraudulent activities. On the commercial front, smartphone manufacturers are aggressively integrating biometric modalities—fingerprint, face, iris, palm, finger vein, and voice—into the smart devices for securing digital payments and ensuring data privacy. In fact, banking and financial services (BFS) is one of the first sectors to adopt advanced biometrics-integrated solutions for enabling secure digital transactions through eKYC, for instance. Enterprises are keen to add layers of authentication through the integration of several different biometric modalities for safe and secure transactions.

In APAC, there is a significant presence of regional and global biometric technology and solution providers specializing in one technology or multiple modalities. However, the biggest challenges customers face after implementing biometric solutions are achieving seamless functioning of the technology with their business processes, accuracy of the data captured, and the ability of the technology to address their exact needs. In such a scenario, a company that is able to develop a highly accurate and robust biometrics technology platform agile enough to address the unmet needs of various customers will have a competitive edge above its peers in the highly dynamic market.

Visionary Innovation & Performance and Customer Impact

Brand Equity

NEC Corporation (NEC) is known for its undisputed excellence in offering a diverse array of biometrics modalities that encompass fingerprint, finger vein, facial, iris, voice, palm print, and ear acoustic. Attaining the highest rank in the US National Institute of Standards and Technology (NIST) tests for Fingerprint Recognition Technology (Fingerprint Recognition Technology Evaluation 2015),

Face Recognition Technology (Multiple Biometric Grand Challenge 2009, Multiple Biometrics Evaluation 2010, Face Recognition Vendor Test 2013, and Face in Video Evaluation 2016) and Iris Recognition Technology (Iris Exchange IX 2018) has time and again testified to NEC's positioning as the first-rate brand in not only the APAC but also the global biometrics market.

Background and Company Performance

The top-notch performance of NEC's biometrics-enabled offerings is attracting companies to associate themselves with the NEC brand so they can promote enhanced security and safety of life and property among their customers. In August 2017, Miyoshi Opto-electronics (S) Pte. Ltd, a 100% owned subsidiary of Miyoshi Limited, a well-known integrated engineering services provider, signed a joint marketing deal with NEC APAC, to market the Digital Situational Response System (SRS) product that is capable of high-end face recognition (FR) surveillance across the APAC region.

This product features NEC's best-of-breed real-time AI-enabled FR technology named NeoFace® Watch embedded into the Miyoshi's wireless audio/video wearable product. The wearable enables ground security personnel to immediately analyse and interpret images then generate actionable insights for their commanders. Realizing the powerful potential of this product, the homeland security agency in a Southeast Asian country has already placed an order contract for use of the NeoFace wearable in a border security application, besides being leveraged for search and rescue missions along the northern border area, for heightened public safety.

Addressing Unmet Needs

In response to the need for solutions that ensure public safety from security threats, NEC works closely with both government agencies and commercial enterprises in APAC to build biometric solutions that make smart cities safer and commercial businesses more secure than before. NEC's FR offering, NeoFace, boasts the highest face matching accuracy in the industry, even if the target suspect's face is partly concealed, if the image has been captured from diverse angles, or while the person is on the move. This advanced FR agility is attributed to the industry-leading feature point extraction technology embedded into the product. Moreover, the software-driven NeoFace Watch enables video surveillance of suspects in crowded areas at unmatched speed and throughput, all in real time. The deep learning algorithms enable increasingly accurate face matching, even from a low-resolution image captured by cameras from a distance. In addition to enabling national ID validation, the solution supports offline face search from recorded smart devices, videos, cameras, and images posted on media against a large database of facial images.

NEC's "liveness detection" anti-spoofing technology enables individuals to easily prove they are who they say they are, and thus prevent unauthorized people wearing masks or using HD pictures, among other schemes, to gain access to restricted areas or to sensitive information with the use of a web camera. Instant identification of suspicious persons before they succeed in checking into critical facilities prevents potential incidents that may jeopardize both life and property. Similarly, users can leverage NEC's mobile fingerprint collection device NeoScan 45 for meeting their field identification needs without compromising on accuracy.

As part of the Safety and Security Industry Programme (SSIP), the Singapore Government finished running three safety and security trials leveraging NEC's NeoFace software in combination with the Intelligent Complex Event Processing tool over the duration of a year, which started September 2016. Through these trials, the government wanted to build a clear understanding of how effectively data analytics can be leveraged to derive security-related intelligence and prevent potential security-threatening incidents for enhanced public safety.

After starting off with R&D on fingerprint recognition, palmprint recognition, and face recognition technologies, NEC has developed highly accurate iris recognition, voice recognition, and proprietary and unique ear acoustic authentication solutions. NEC positions all its biometric authentication technologies under the brand name "Bio-Idiom" that covers a wide spectrum of applications and sectors. Bio-Idiom provides a highly secure environment in the digital world, which is vulnerable to hacking and security threats. NEC's Bio-Idiom is being used by more than 700 systems in over 70 countries globally.

Frost & Sullivan research finds NEC has scored high among its peers in terms of technology accuracy, robustness, and fulfilling the unmet needs of its customers. NEC, with its advanced, highly accurate technology useful across various applications in many industries creates superior value to its customers and has been able to establish itself as a leading biometric player in the market.

Visionary Scenarios through Mega Trends

NEC's unwavering focus on enhancing quality of life positioned it as one of Sunway Iskandar's preferred vendors of information and communication technology (ICT) solutions for the Sunway Iskandar township. Endeavoring to make this township spanning 1,800 acres smarter, safer, and more secure than before, Sunway Iskandar signed a collaborative deal with NEC APAC in September 2018. Sunway Iskandar is, in fact, looking to deploy NEC's newest, best-in-class IoT-based as well as AI-enabled biometrics technologies and video analytics solutions to transform this township into a smart and sustainable city.

Apart from building a one-stop service desk support centre from which NEC will operate its Managed Service business, the company has plans to establish an Innovation Centre of Excellence (CoE), totaling 20,000 square feet, in partnership with Sunway Innovation Labs in 2020 to boost employment opportunities in the Sunway Iskandar city marked by rapid growth. This initiative aligns with Sunway Iskandar's goal to reach a count of 200 auxiliary police officers and workforce trained under the Royal Malaysia Police by 2020 to protect this smart city development.

By building a team of talented individuals and subject matter experts (SMEs), NEC APAC and Sunway Iskandar will pave the way for the innovation of next-generation proof-of-concepts (POCs) and prototypes for biometric applications related to not just transportation but also healthcare and public safety, before commercializing them.

Privacy concerns are a major challenge for the biometric industry and the end users are continually demanding on improved measures to be taken to address the privacy related issues. NEC has taken a visionary step in addressing and resolving this issue. NEC has established a "Digital Trust Business Strategy Division" to create and promote a strategy devised on the concept of Human Rights by Design (HRbD) and the impact of adoption of artificial intelligence (AI), and biometrics technology on the society and human rights. HRbD promotes the idea of "Privacy by Design" and encourages businesses to incorporate fairness and privacy into each step in the value chain. Digital Trust Business Strategy Division of NEC consists of experts on legal systems, ethics, and technologies. Additionally, an external expert council, consisting of non-profit organizations, experts, and consumers, is formed.

A Frictionless and Highly Satisfying Customer Experience

The APAC biometrics market is witnessing increasing demand for FR solutions from the commercial sector, including retail and banking, for accurately identifying and authenticating people in a frictionless and convenient manner. For instance, the Holland Village branch of the OCBC Bank in Singapore was looking to digitally identify premium banking customers to smoothly render enhanced quality of services to them and foster long-standing banking relationships.

To cater to the branch's aforementioned need, NEC launched an FR system in December 2017, following an effective trial run.

Designed after NEC's AI-based FR NeoFace tool, this system facilitates the instant identification of customers as they step into the bank's lounge area. What makes it a frictionless experience for customers is that they do not have to stop moving for the camera to capture their identity. Real-time analysis of each patron enables the branch to instantly identify premium customers. Such customers enjoy a personalized and highly satisfying banking experience as the Premium Service Manager of this bank ensures prompt service delivery besides welcoming them by their desired names and offering them their favourite drinks and magazines as part of customer engagement strategy. Premium customers have been highly overwhelmed with the branch's personalized hospitality thus far.

Customer Acquisition

Characterized by unprecedented accuracy and speed of recognition as well as performance reliability, NEC's biometric authentication technologies enable governments not just in the APAC region but across the globe to process over 850 million identities. For example, NEC's biometric technologies already have an installed base of over 700 systems spanning 70 countries across the globe. In the APAC area alone, while Sunway Iskandar selected it as one of the ideal ICT vendors for its smart city project, NEC's FR was used to enhance safety and security during the 18th Asian Games held in Indonesia in 2018. NEC offered NeoFace and a behavior detection system to the Gelora Bung Karno Stadium in Jakarta, the main stadium of this mega event. These systems identify suspicious persons, who have been registered in advance, from surveillance camera video footage as well as detect intrusions to restricted areas and suspicious objects. In addition, NEC also provided a network system that played a vital role in successfully managing the event. This network system connected 130 locations, including associated offices of the Indonesia Asian Games 2018 Organizing Committee (INASGOC) and all the competition venues. NEC provided additional support by providing surveillance cameras, network systems, and telephone exchanges for the competition venue- athletics stadium, basketball gymnasium, baseball stadium, and tennis courts in Jakarta.

Narita International Airport, Japan, has partnered with NEC for the "One-ID" check-in boarding process. This new process will allow Narita Airport to register the facial images during check-in. After the images are matched against the the database of passport photos, the passengers can proceed with the following procedures such as baggage drop-off, passenger security screening entrance, and boarding. Passengers will also be able to board without any boarding pass or passports. Implementation of NeoFace will improve the security systems of the Narita Airport drastically by allowing the authorities to accurately recognize and identify individuals.

E. SUN Commercial Bank Ltd., a major bank in Taiwan has partnered with NEC for implementing NeoFace in the bank's ATMs to provide safe and secure services.

The ATMS with one-time password technology are installed at 5 locations in Taiwan. The first time users need to register themselves with the banking ATM system using NeoFace facial recognition technology. Once the registration process is completed with photo and one time password setting, the users can withdraw cash by only facial recognition and PIN registration. The anti-spoofing technology in NeoFace also allows the ATMs to identify whether the person doing the transaction is a real person or an image, or mask.

Other NEC biometric technology use cases across APAC include the following:

India: NEC's smart video analytics solutions have been adopted for urban surveillance and forensic investigation applications as part of the country's Safe City Project. This has enabled the Surat City Police to bring down the crime rate by 27% while also contributing to solving 150 pending criminal cases. Additionally, NEC delivered a multi-modal biometric system comprising fingerprint, face, and iris for India's National ID System, named AADHAAR.

Singapore: NEC's biometrics modalities are used in Singapore's Enhanced Immigration Automated Clearance System, which has eliminated the need for Singaporeans to carry paper passports. They now use a digital biometric passport that is machine read to clear immigration in 8 seconds, on average, which simplifies crowd flow management by preventing long queues.

Japan: Organizers of the Tokyo 2020 Olympic and Paralympic Games have selected NEC's cutting-edge FR technology to identify more than 300,000 people covering not only athletes and volunteers but also media and employees against the database to proactively prepare for the Olympics. The integrated circuit (IC) chips incorporated into the system will come with ID cards that will facilitate the automated identity authentication of people entering the sporting event venue without interrupting the crowd flow. Overall, this will ensure the Games happen in a safe and secure environment. In addition, Japan Customs is now working with NEC for an electronic customs procedure gate featuring facial recognition for use at the customs inspection area at Narita International Airport, Japan's busiest airport. Demonstration trials of the biometric gate are scheduled to begin from April 2019.

Japan customs department has entrusted NEC for electronic customs procedure gate featuring facial recognition for use at the customs inspection area of Japan's busiest airport terminal. The first of its kind customs procedure in Japan will start off with the Terminal 3 at Narita International Airport from April 2019. NEC's face recognition technology will identify the passengers at the kiosk terminals and the exit gate. Easy electronic baggage declaration will be facilitated by a smartphone application and will allow travellers to register baggage contents and passport details. Such an automated system by NEC is expected to speed up the process immensely by reducing waiting time and passenger congestion at the customs inspection area.

7-Eleven convenience stores in Japan have partnered with NEC to open a cashier less convenience store using NEC's facial recognition technology for customer check-out. The pilot store opened in December 2018 in Tokyo for NEC group offices. Pre registered NEC employees can access the store by authenticating themselves using facial recognition. The barcodes of the items picked need to be scanned and the payments will be auto deducted from the respective employees' salaries.

Frost & Sullivan finds that NEC has a successful track record of implementing its facial recognition biometric technologies across a wide range of industries and supporting its customers with satisfactory results, thereby proving to be the leading biometric solution provider in the APAC region.

Conclusion

NEC's undisputed excellence in designing and manufacturing different biometric modalities, namely fingerprint and finger vein, facial, iris, voice, palm print, and ear acoustic, underpins its commitment to enhancing peoples' quality of life by making smart cities safer than before and commercial businesses more secure than ever. NEC's top NIST rankings for Fingerprint Recognition Technology, Face Recognition Technology, and Iris Recognition Technology distinctly justify the high adoption of its biometrics-enabled identity authentication and real-time video analytics solutions among governmental agencies and commercial enterprises in not only APAC but also across the globe.

Based on the feature point extraction technology, NEC's leading and cutting-edge AI-enabled NeoFace FR tool boasts unprecedented face matching accuracy and speed of recognition, irrespective of the resolution and angle from which the images have been clicked, even when the target is on the move. Powerful capabilities, such as liveness detection prevent the granting of authorized access to unauthorized individuals attempting to dupe identities using face-altering masks or HD pictures. Instant identification of suspects enables government agencies to prevent security breaches and ensure enhanced public safety.

With the APAC market currently witnessing increasing demand for biometric solutions from the commercial sector, NEC's solutions are being adopted by banks, such as the Holland Village branch of the OCBC Bank in Singapore, to enhance their customer service. NEC's biometric technologies already have an installed base of more than 700 systems in 70 countries across the globe. Its elite list of customers include Surat City Police (India), Indian government (AADHAAR project), and Singapore Immigration and Checkpoints Authority.

For its strong overall performance, NEC has earned the 2019 Frost & Sullivan Asia-Pacific Biometrics Company of the Year award.



To receive the Company of the Year Award (i.e., to be recognized as a leader not only in your industry, but among your non-industry peers as well) requires a company to demonstrate excellence in growth, innovation, and leadership. This kind of excellence typically translates into superior performance in three key areas: demand generation, brand development, and competitive positioning. These areas serve as the foundation of a company’s future success and prepare it to deliver on the two criteria that define the Company of the Year Award (Visionary Innovation & Performance and Customer Impact).

Demand

- Acquire competitor’s customers
- Increase renewal rates
- Increase upsell rates
- Build a reputation for value
- Increase market penetration

Brand

- Earn customer loyalty
- Foster strong corporate identity
- Improve brand recall
- Inspire customers
- Build a reputation for creativity

Competitive Positioning

- Stake out a unique market position
- Promise superior value to customers
- Implement strategy successfully
- Balance price and value
- Deliver on the promised value proposition

Understanding Company of the Year



As discussed above, driving demand, brand strength, and competitive differentiation all play a critical role in delivering unique value to customers. This three-fold focus, however, must ideally be complemented by an equally rigorous focus on Visionary Innovation & Performance to enhance Customer Impact.

Key Benchmarking Criteria

For the Company of the Year Award, Frost & Sullivan analysts independently evaluated two key factors—Visionary Innovation & Performance and Customer Impact—according to the criteria identified below.

Visionary Innovation & Performance

- Criterion 1: Addressing Unmet Needs
- Criterion 2: Visionary Scenarios through Mega Trends
- Criterion 3: Implementation Best Practices
- Criterion 4: Blue Ocean Strategy
- Criterion 5: Financial Performance

Customer Impact

- Criterion 1: Price/Performance Value
- Criterion 2: Customer Purchase Experience
- Criterion 3: Customer Ownership Experience
- Criterion 4: Customer Service Experience
- Criterion 5: Brand Equity

Decision Support Scorecard

To support its evaluation of best practices across multiple business performance categories, Frost & Sullivan employs a customized Decision Support Scorecard. This tool allows our research and consulting teams to objectively analyze performance,

according to the key benchmarking criteria listed in the previous section, and to assign ratings on that basis. The tool follows a 10-point scale that allows for nuances in performance evaluation. Ratings guidelines are illustrated below.

RATINGS GUIDELINES



The Decision Support Scorecard is organized by Visionary Innovation & Performance and Customer Impact (i.e., these are the overarching categories for all 10 benchmarking criteria; the definitions for each criterion are provided beneath the scorecard.). The research team confirms the veracity of this weighted scorecard through sensitivity analysis,

which confirms that small changes to the ratings for a specific criterion do not lead to a significant change in the overall relative rankings of the companies. The results of this analysis are shown below. To remain unbiased and to protect the interests of all organizations reviewed, we have chosen to refer to the other key participants as Competitor 1 and Competitor 2.

DECISION SUPPORT SCORECARD FOR COMPANY OF THE YEAR

Measurement of 1–10 (1 = lowest; 10 = highest)	Company of the Year		
	Visionary Innovation & Performance	Customer Impact	Average Rating
NEC	9.8	9.8	9.8
Competitor 1	9.0	9.0	9.0
Competitor 2	8.5	8.5	8.5

Visionary Innovation & Performance

Criterion 1: Addressing Unmet Needs

Requirement: Implementing a robust process to continuously unearth customers' unmet or under-served needs, and creating the products or solutions to address them effectively

Criterion 2: Visionary Scenarios through Mega Trends

Requirement: Incorporating long-range, macro-level scenarios into the innovation strategy, thereby enabling "first-to-market" growth opportunity solutions

Criterion 3: Implementation of Best Practices

Requirement: Best-in-class strategy implementation characterized by processes, tools, or activities that generate a consistent and repeatable level of success.

Criterion 4: Blue Ocean Strategy

Requirement: Strategic focus on creating a leadership position in a potentially "uncontested" market space, manifested by stiff barriers to entry for competitors

Criterion 5: Financial Performance

Requirement: Strong overall business performance in terms of revenues, revenue growth, operating margin, and other key financial metrics

Customer Impact

Criterion 1: Price/Performance Value

Requirement: Products or services offer the best value for the price, compared to similar offerings in the market.

Criterion 2: Customer Purchase Experience

Requirement: Customers feel they are buying the most optimal solution that addresses both their unique needs and their unique constraints.

Criterion 3: Customer Ownership Experience

Requirement: Customers are proud to own the company's product or service and have a positive experience throughout the life of the product or service.

Criterion 4: Customer Service Experience

Requirement: Customer service is accessible, fast, stress-free, and of high quality.

Criterion 5: Brand Equity

Requirement: Customers have a positive view of the brand and exhibit high brand loyalty.

Decision Support Matrix

Once all companies have been evaluated according to the Decision Support Scorecard, analysts then position the candidates on the matrix shown below, enabling them to visualize which companies are truly breakthrough and which ones are not yet operating at best-in-class levels.

DECISION SUPPORT MATRIX FOR COMPANY OF THE YEAR AWARD (ILLUSTRATIVE)



Best Practices Recognition: 10 Steps To Researching, Identifying, And Recognizing Best Practices

Frost & Sullivan analysts follow a 10-step process to evaluate Award candidates and assess their fit with select best practice criteria. The reputation and integrity of the Awards are based on close adherence to this process.

STEP	OBJECTIVE	KEY ACTIVITIES	OUTPUT
 Monitor, target, and screen	Identify award recipient candidates from around the globe	<ul style="list-style-type: none"> • Conduct in-depth industry research • Identify emerging sectors • Scan multiple geographies 	Pipeline of candidates who potentially meet all best-practice criteria
 Perform 360-degree research	Perform comprehensive, 360-degree research on all candidates in the pipeline	<ul style="list-style-type: none"> • Interview thought leaders and industry practitioners • Assess candidates' fit with best-practice criteria • Rank all candidates 	Matrix positioning all candidates' performance relative to one another
 Invite thought leadership in best practices	Perform in-depth examination of all candidates	<ul style="list-style-type: none"> • Confirm best-practice criteria • Examine eligibility of all candidates • Identify any information gaps 	Detailed profiles of all ranked candidates
 Initiate research director review	Conduct an unbiased evaluation of all candidate profiles	<ul style="list-style-type: none"> • Brainstorm ranking options • Invite multiple perspectives on candidates' performance • Update candidate profiles 	Final prioritization of all eligible candidates and companion best-practice positioning paper
 Assemble panel of industry experts	Present findings to an expert panel of industry thought leaders	<ul style="list-style-type: none"> • Share findings • Strengthen cases for candidate eligibility • Prioritize candidates 	Refined list of prioritized award candidates
 Conduct global industry review	Build consensus on award candidates' eligibility	<ul style="list-style-type: none"> • Hold global team meeting to review all candidates • Pressure-test fit with criteria • Confirm inclusion of all eligible candidates 	Final list of eligible award candidates, representing success stories worldwide
 Perform quality check	Develop official award consideration materials	<ul style="list-style-type: none"> • Perform final performance benchmarking activities • Write nominations • Perform quality review 	High-quality, accurate, and creative presentation of nominees' successes
 Assemble board of advisors	Finalize the selection of the best-practice award recipient	<ul style="list-style-type: none"> • Present candidates to a Board of Advisors • Build consensus • Select winner 	Decision on which company performs best against all best-practice criteria
 Communicate recognition	Inform award recipient of award recognition	<ul style="list-style-type: none"> • Present award to the CEO • Inspire the organization for continued success • Celebrate the recipient's performance 	Announcement of award and plan for how recipient can use the award to enhance the brand
 Take strategic action	Share award news with stakeholders and customers	<ul style="list-style-type: none"> • Coordinate media outreach • Design a marketing plan • Assess award's role in future strategic planning 	Widespread awareness of recipient's award status among investors, media personnel, and employees

The Intersection Between 360-degree Research And Best Practices Awards



360-degree research: seeing order in the chaos

Research Methodology

Frost & Sullivan’s 360-degree research methodology represents the analytical rigor of our research process. It offers a 360-degree-view of industry challenges, trends, and issues by integrating all 7 of Frost & Sullivan’s research methodologies. Too often, companies make important growth decisions based on a narrow understanding of their environment, leading to errors of both omission and commission.

Successful growth strategies are founded on a thorough understanding of market, technical, economic, financial, customer, best practices, and demographic analyses. The integration of these research disciplines into the 360-degree research methodology provides an evaluation platform for benchmarking industry players and for identifying those performing at best-in-class levels.

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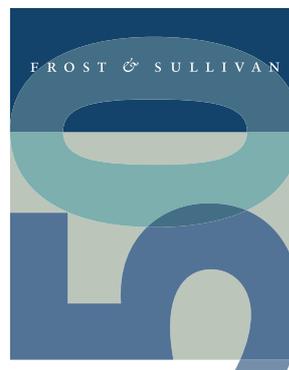
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About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, works in collaboration with clients to leverage visionary innovation that addresses the global challenges and related growth opportunities that will make or break today's market participants. For more than 50 years, we have been developing growth strategies for the Global 1000, emerging businesses, the public sector and the investment community.

Is your organization prepared for the next profound wave of industry convergence, disruptive technologies, increasing competitive intensity, Mega Trends, breakthrough best practices, changing customer dynamics and emerging economies?

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