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20 25 | ENABLING TECHNOLOGY LEADER

Leveraging Vital Technology to Enhance Products and Applications

*RECOGNIZED FOR BEST PRACTICES IN THE GLOBAL SASE 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. Aryaka excels in many of the criteria in the SASE space.

RECOGNITION CRITERIA

Technology Leverage	Customer Impact
Commitment to Innovation	Price/Performance Value
Commitment to Creativity	Customer Purchase Experience
Stage Gate Efficiency	Customer Ownership Experience
Commercialization Success	Customer Service Experience
Application Diversity	Brand Equity

The Strategic Imperative 8: Factors Creating Pressure on Growth
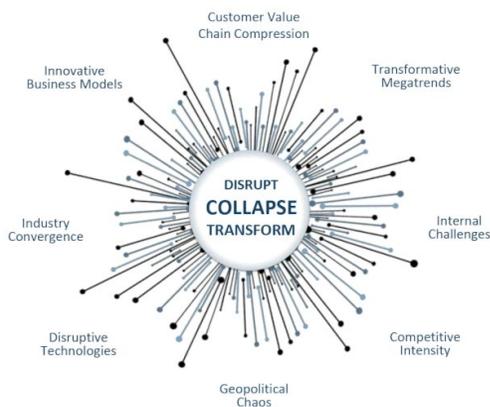
- **Innovative Business Models**: A new revenue model that defines how a company creates and capitalizes economic value, typically impacting its value proposition, product offering, operational strategies, and brand positioning

- **Customer Value Chain Compression**: Customer value chain compression as a result of advanced technologies, internet platforms, and other direct-to-consumer models that enables the reduction of friction and the number of steps in customer journeys

- **Transformative Megatrends**: Global forces that define the future world with their far-reaching impact on business, societies, economies, cultures, and personal lives

- **Disruptive Technologies:** New, disruptive technologies that are displacing the old, and significantly altering the way consumers, industries, or businesses operate

- **Internal Challenges**: The internal organizational behaviors that prevent a company from making required changes

- **Competitive Intensity**: A new wave of competition from start-ups and digital business models that challenge the standing conventions of the past, compelling established industries to re-think their competitive stance

- **Geopolitical Chaos**: Chaos and disorder arising from political discord, natural calamities, pandemics, and social unrest that impact global trade, collaboration, and business security

- **Industry Convergence**: Collaboration between previously disparate industries to deliver on whitespace cross-industry growth opportunities

The Transformation of the SASE Industry

In an era where global connectivity and cybersecurity must work together, Aryaka has emerged as a standout innovator and market shaper in the Secure Access Service Edge (SASE) industry. Its comprehensive and fully managed approach to SASE has redefined customer expectations for agility, performance, and simplicity. Aryaka is presented with Frost & Sullivan's 2025 Global Enabling Technology Leadership recognition for its outstanding technological leverage and commitment to delivering transformative customer impact in the rapidly evolving network security landscape.

Technology Leverage: A Unified Vision of Performance, Innovation, and Simplicity

Aryaka's distinctive technology leadership stems from its ability to unify networking and security functions under a single, cloud-first service architecture. At the core of its offering is the proprietary OnePASS™ Architecture, which integrates security enforcement, network optimization, and observability within a single-pass framework. Unlike traditional SASE architectures that suffer from latency-inducing traffic hair-pinning or require multi-vendor orchestration, Aryaka executes policies at the edge, dramatically improving application performance and user experience.

> *"Aryaka's Zero Trust WAN, spanning over 40 global physical Points of Presence (PoPs), is dynamically enhanced through virtual PoPs hosted on hyperscaler platforms like AWS and Google Cloud. This architectural dynamism ensures that customers experience low latency, fast deployment, and regulatory compliance with consistent service quality regardless of geographical reach. By leveraging physical and virtual infrastructure, Aryaka has created a platform that balances scalability with geographic precision, a feat few competitors have matched."*
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The company's commitment to forward-looking innovation is embodied in its AI> initiative, a portfolio of artificial intelligence-powered services tailored to modern enterprise requirements. AI>Perform enhances the delivery of GenAI workloads, AI>Observe augments observability with predictive threat

analytics, and the forthcoming AI>Secure will focus on securing AI-generated traffic. This roadmap highlights Aryaka's unique ability to anticipate and address future enterprise challenges with purpose-built capabilities.

A crucial element of Aryaka's technological leverage lies in its ability to simplify complexity. Its MyAryaka Portal offers a single pane of glass for monitoring, configuration, and analytics, reducing the operational burden on IT teams and accelerating time to value. Customers benefit from transparent insights and self-service agility without compromising on centralized control or managed service support.

Aryaka has also made commendable strides in productization and go-to-market clarity. Its portfolio has been streamlined into three tiers, SD-WAN, Unified SASE, and Advanced Security, enabling straightforward onboarding and partner alignment. This structured modularity accelerates customer time-to-deployment and strengthens Aryaka's scalability across mid-market and enterprise segments.

Aryaka's technological leadership is not just about high performance or elegant integration. It's about redefining what enterprises should expect from a modern, secure, and agile connectivity platform that fuses cutting-edge architecture with real-world usability.

Customer Impact: Experience, Trust, and Global Alignment

Aryaka's customer impact is rooted in the notion that the best technologies must translate into tangible, repeatable business outcomes. The company's client base, which includes some of the most demanding global enterprises, has shown strong adoption of Aryaka-native services, reflecting trust in its security, performance, and managed delivery capabilities.

The migration of customers from third-party firewalls to Aryaka's native security stack is a testament to the brand's perceived value. Clients are consolidating their networking and security functions with Aryaka, reducing their vendor footprint, enhancing operational efficiency, and optimizing performance across global sites. Aryaka's flexibility in offering fully managed, co-managed, or self-managed service delivery means customers can right-size their engagement model based on internal capabilities and resource availability.

From a brand equity perspective, Aryaka's efforts to simplify pricing and enhance transparency have resonated with enterprise buyers seeking predictability and ease of procurement. The three-tier pricing structure is especially impactful for mid-sized businesses looking to scale securely without navigating the complexities of bespoke contracts or unclear service definitions. This clarity fosters a better purchase experience, aligning solution value with enterprise constraints and aspirations.

Customer service, a frequent pain point in complex networking solutions, is another area where Aryaka excels. Its integrated support within the MyAryaka Portal, with rapid issue resolution and continuous service monitoring, creates a high-touch customer ownership experience without being high-friction. The value delivered goes beyond uptime and availability, including peace of mind.

Additionally, Aryaka's collaborative roadmap design is grounded in listening. Features like Remote Browser Isolation (RBI) integration, support for Cisco Duo, and advanced logging were all customer-driven

enhancements. This feedback loop demonstrates a commitment to innovation and relevance, ensuring the platform evolves with its user base and their specific needs.

In short, Aryaka's impact on its customers extends beyond technical performance. It delivers trust, clarity, and strategic alignment, forming the foundation for long-term partnerships and industry-leading customer loyalty.

Strategic Growth and Industry Stewardship

Aryaka's market trajectory exemplifies how strategic vision, backed by strong execution, translates into sustained growth. The company has made significant inroads in EMEA and APAC through strategic alliances with regional integrators and the onboarding of local leadership. These moves have deepened Aryaka's understanding of local regulatory landscapes while ensuring scalable delivery of its global capabilities.

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Virtual PoPs represent one of Aryaka's most compelling growth enablers. They offer the ability to deploy services rapidly in underserved or hard-to-reach markets, without the capital and time costs typically associated with physical infrastructure. This flexibility is operationally beneficial and a powerful competitive differentiator in regions where agility and compliance are paramount.

From a commercialization standpoint, Aryaka's investments in simplifying its offerings and go-to-market processes yield measurable returns. The rapid onboarding process, modular portfolio, and coherent brand messaging reduce friction in the sales cycle, benefiting channel partners and direct clients alike. These streamlined pathways enhance Aryaka's ability to scale without compromising customer experience or product integrity.

The company's foresight in aligning AI capabilities with SASE is another differentiator with long-term implications. As AI workloads become more prevalent in enterprise environments, the need for secure, high-performing networking to support these applications becomes non-negotiable. Aryaka's AI> strategy directly addresses this emerging intersection of network performance and intelligent security, allowing it to shape demand rather than merely respond.

Moreover, Aryaka's holistic approach to SASE, delivering SD-WAN, security, and observability in a converged, cloud-native architecture, reinforces its position as a true leader rather than a follower in the market. While other vendors may offer piecemeal functionality or rely on third-party integrations, Aryaka's end-to-end control and ownership of the service stack give it an unmatched ability to innovate, support, and scale.

Aryaka is well-positioned to expand its influence as enterprises prioritize secure digital transformation and global connectivity. The company's proven ability to meet complex needs with elegant solutions, backed by a customer-first philosophy, sets it apart as a prime example of enabling technology leadership.

Conclusion

Aryaka has demonstrated strong leadership in the SASE market through its integrated platform, customer-focused innovation, and flexible service delivery. Its ability to simplify complex networking and security challenges while supporting global enterprise needs stands out in a crowded field. With thoughtful investments in AI, a clear product strategy, and consistent responsiveness to customer feedback, Aryaka is well-positioned for continued success. For its strong overall performance, Aryaka is presented with Frost & Sullivan's 2025 Global Enabling Technology Leadership Recognition in the SASE industry.

What You Need to Know about the Enabling Technology Leadership Recognition

Frost & Sullivan's Enabling Technology 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 Enabling Technology Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Technology Leverage

Commitment to Innovation: Continuous emerging technology adoption and creation enables new product development and enhances product performance

Commitment to Creativity: Company leverages technology advancements to push the limits of form and function in the pursuit of white space innovation

Stage Gate Efficiency: Technology adoption enhances the stage gate process for launching new products and solutions

Commercialization: Company displays a proven track record of taking new technologies to market with a high success rate

Application Diversity: Company develops and/or integrates technology that serves multiple applications and multiple environments

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)**