

# 2025 Frost & Sullivan Enabling Technology Leadership Recognition

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Global Smart Connectivity Industry  
Excellence in Best Practices

*Leveraging Vital Technology to Enhance Products and Applications*



## RECOGNITION CRITERIA

<i>Technology Leverage</i>	<i>Customer Impact</i>
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

### 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. floLIVE excels in many of the criteria in the smart connectivity space.

#### **floLIVE: Redefining Global Smart Connectivity**

Founded in 2015 and headquartered in London, floLIVE operates the world's largest hyperlocal, global data network<sup>1</sup>, enabling centrally managed local connectivity for any device, anywhere. The company facilitates cutting-edge fifth-generation (5G) network solutions (privately and on the cloud) alongside a comprehensive global cellular connectivity services suite for Internet of Things (IoT) applications. It empowers users with direct network access, connectivity control, device monitoring, remote operator switching, and proactive troubleshooting, significantly optimizing device performance. By redefining traditional networks, Frost & Sullivan points out that floLIVE expedites flexible IoT deployment, giving mobile operators, IoT service providers, and enterprises greater control over their connectivity.

floLIVE has earned the trust and support of prominent investment firms like 83North, ARIE Capital Group, DELL Technologies Capital, Qualcomm Ventures, Saban Ventures, and Greenfield. This rich investor portfolio testifies to the company's technological innovation and market potential.

Accentuating a future-oriented approach, floLIVE addresses customers' unmet needs through continuous research and development (R&D), with 70% of its employee base dedicated to innovation. The company's growth-focused strategy catalyzes persistent geographic expansion, with a robust global footprint.<sup>2</sup>

<sup>1</sup> <https://fllolive.net/>

<sup>2</sup> floLIVE Global Connectivity Solutions for Enterprises (floLIVE, January 2025)

floLIVE meticulously tracks the evolving industry landscape to align its technology and solutions with shifting trends, drivers, and challenges. The company's connectivity management platform uniquely enables broad global coverage, reliability, security, streamlined business processes, and quick issue resolution. By coupling long-term cost and operational efficiency with superior performance (i.e., low latency, high throughput) and outstanding customer support, Frost & Sullivan's own research agrees that floLIVE sets itself apart from other competitors.

floLIVE addresses the shortcomings of sub-optimized connectivity solutions that cannot meet customers' unique requirements or provide seamless global connectivity. For instance, purchasing local Subscriber Identity Modules (SIMs) in different countries leads to separate commercial agreements, operational

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**- Iqra Azam**  
**Best Practices Research Analyst**

complexities, a lack of control, and various support teams and behaviors. Legacy roaming-based solutions often contend with permanent roaming restrictions, degraded performance, compliance risks, and high costs. Similarly, mobile network operator (MNO)-embedded SIM profiles pose constraints like separate commercial agreements, a lack of control, and multiple support teams and behaviors.

floLIVE delivers cloud-native, fully optimized (for IoT) solutions to bridge industry gaps. The company leverages its transformative technology to enable satellite and cellular connectivity, real-time billing, SIM management, and connectivity management. It allows customers to integrate and own the entire cellular

connectivity technology stack, incorporating multi-profile SIM. Moreover, floLIVE maintains strategic synergies with leading MNOs in each region, ensuring reliable and efficient network coverage with 99.99% uptime. Customers also benefit from floLIVE's globally distributed local core networks in key areas.

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### **Galvanizing Unmatched Customer Value with Secure, Scalable, and Cost-efficient Solutions**

floLIVE rigorously tests its in-house technology in real-world environments and does not rely on third-party licenses, delivering exceptional deployment flexibility. It adapts and customizes its solutions to align with customers' specific needs. The company's innovation-powered, full stack of IoT connectivity solutions comprises: floNET, floCONTROL, long-term evolution (LTE)/5G mobile private networks (MPN) solutions, Global Network-as-a-Service, floBSS, network resiliency service, and solutions to boost device performance.

floLIVE facilitates global cellular coverage “with multiple leading MNO profiles in every country, covering all countries in the world.”<sup>3</sup> Some of the highly regulated countries where floLIVE helps customers provide connectivity are China, Brazil, Turkey, South Africa, Canada, Australia, and Singapore. Moreover, the company is constantly establishing new local points of presence, with its current roadmap focusing on Singapore, Canada, Puerto Rico, Panama, Costa Rica, the Dominican Republic, and the Netherlands.<sup>4</sup>

***floNET: The World’s First Cloud-native, Software-defined Connectivity Solution*<sup>5</sup>**

floNET empowers customers with advanced global cellular connectivity and SIM management services. It outperforms traditional solutions by removing the complexities of multiple protocols, signaling, and standards and enhancing connectivity. floNET is ideal for customers seeking cost-efficient, compliant, high-performing, low latency, and roaming-free IoT connectivity solutions. Low latency and efficient performance are critical, unmet customer needs. floLIVE’s leadership seized this growth opportunity and developed groundbreaking technology that sets new connectivity standards. floNET capitalizes on the company’s global International Mobile Subscriber Identity (IMSI) library, the largest of its kind, and distributed core networks available in key geographies around the world and continuously expanding into new areas.<sup>6</sup>

floNET encapsulates all necessary components of the ideal global connectivity management solution, navigating regulatory and trade barriers. Multiple factors bolster the company’s competitive advantage. Its technology helps customers accelerate their time to market by keeping all infrastructure elements under one roof. Users can onboard onto floLIVE’s service platform with a username and password and quickly implement their IoT strategy.

Additionally, floNET entails a creative and highly adaptable billing engine tailored to the unique business models in the IoT domain. The company proactively upgrades its technology to complement new standards and Global System for Mobile Communications technologies (e.g., second-generation, third-generation, LTE, LTE for machines, narrowband-IoT, and 5G). Moreover, floLIVE offers a transparent, pay-as-you-grow model, lowering the total cost of ownership.<sup>7</sup>

As a fully automated service platform, floNET minimizes human intervention and boosts profits. It complies with global privacy regulations (e.g., the General Data Protection Regulation) while adhering to roaming restrictions, local tax laws, and data policies. Integrated with an advanced and unified Representational State Transfer (REST) application programming interface (API) suite, floNET supports interoperability with other solutions, augmenting operational efficiency. Its multi-layered security framework ensures robust data and device protection against fraud and cybersecurity threats with over-the-air communications, Amazon Web Services and Oracle Cloud Infrastructure integrations, secure login, user tokens, anti-fraud analytics, and red teaming.

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<sup>3</sup> Ibid.

<sup>4</sup> Ibid.

<sup>5</sup> <https://fllolive.net/flonet/>

<sup>6</sup> <https://fllolive.net/solutions/>

<sup>7</sup> Solution brief: floNET (floLIVE, April 2020)

floLIVE has a core network in multiple countries; each is connected directly to one or more MNO partners, to facilitate local IMSI registration. floLIVE's SIMs come preloaded with the necessary IMSIs, or with a boot strap profile to initiate the first connection and then download the desired local IMSIs. floLIVE also supports eSIM (M2M, Consumer, and SGP.32 when available.)

The local IMSI service helps to resolve key customer pain points, including permanent roaming, data privacy, security, and performance. floLIVE's cloud-native system oversees the entire platform, ensuring complete management and control of remote SIM provisioning (RSP), and billing.<sup>8</sup>

floNET integrates floSIM to provide coverage globally via cellular reception and satellite, harnessing an embedded application for improved security and intelligent switching capabilities. The company's patented SIM applet uses customer-defined business logic to control the SIM's behavior. Designed for reliability, the applet boasts autonomous switching, allowing the SIM to shift to a local network in every country if the radio signal is degraded or lost, maintaining uninterrupted service for mission-critical devices. floLIVE also supports an RSP mechanism to manage connections and network switching.

### ***floCONTROL: Holistic CMP-as-a-Service<sup>9</sup>***

IoT deployments typically operate beyond the constraints of traditional solutions. They require massive scalability and rigorous regulatory compliance. With advanced technologies, MNOs and IoT service providers can tap into new business models. Conventional connectivity management platforms (CMPs) are increasingly ineffective, with some still running on hardware-dependent and expensive technology with high operating costs that are not suitable for IoT business needs. Post-implementation, these platforms are difficult to manage, scale, and incorporate into mobile operators' ecosystems.

floCONTROL, floLIVE's cloud-native CMP-as-a-Service takes a different approach. It unifies operational, technical, and commercial functions into a single scalable platform, replacing conventional CMP complexities with a fully virtualized stack that enables rapid deployment and seamless global reach. Through floLIVE's hyperlocal global network featuring regional packet gateways and direct integration with numerous Tier 1 carriers, MNOs, other providers, customers can access low latency, high performance connectivity in multiple regions, while maintaining full compliance with local regulations. floCONTROL operates on a pay-as-you-go model with no capital expenditures, helping MNOs launch new services in four to six weeks. The platform supports LPWAN and caters to machine-to-machine and Consumer Embedded Universal Integrated Circuit Card (eSIM and iSIM) use cases. By leveraging floLIVE's infrastructure, MNOs can extend their coverage footprint, offer localized connectivity not covered by their existing roaming agreements, and tap into new revenue streams by serving global enterprise customers.

floCONTROL's extensive capabilities include lifecycle management, automated network steering, resiliency, configuration, global extension, advanced billing, IoT in mind, alerts and dashboards, and advanced security. The platform also serves as a gateway to floCONNECT, floCORE, floSIM and floBSS.

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<sup>8</sup> Ibid.

<sup>9</sup> <https://frolive.net/flocontrol/>

**Mobile 5G Private Network<sup>10</sup>**

With enterprises embracing IoT-driven digital transformation, connectivity demands are also shifting. Remote work is trending, making robust security a top priority. Additionally, organizations are expanding and enhancing operations by deploying global tracking and location services. On-campus connectivity is critical across different verticals (from hospitals and military bases to manufacturing and industrial buildings) where uninterrupted, secure communication is indispensable. These factors push private 5G implementation to align with the landscape shaped by Industry 4.0 and digital health trends.

The telecommunications industry is further changing with the Citizens Broadband Radio Service adopted in the United States, now expanding to the United Kingdom and Europe, and expected to become global in the future. This shift gives citizens access to unlicensed wireless spectrum, eliminating the hassle and costs of acquiring licenses. Bypassing the need for private or shared spectrum licensing, private campus radio access networks (RANs) are becoming more accessible, catalyzing better quality of service, stronger security, and streamlined deployment.

Public networks usually employ a one-size-fits-all approach to connectivity, failing to address unique customer needs. In comparison, floLIVE's LTE/5G MPN solution seamlessly integrates with customers' information technology infrastructure while aligning with their security and corporate policies. The

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**- Brent Iadarola**  
**Practice Area Leader (ICT), Growth**  
**Opportunity Analytics**

company facilitates next-level connectivity leveraging centralized cloud-based control.

floLIVE's solution adds to its technological edge with multi-site/multi-facility support, flexible deployment options (on-premises or cloud), the 3rd Generation Partnership Project compliance for easy integration with any RAN, and true global connectivity in 195 countries. The company's MPN is specially curated for private campus, nationwide private, and global private networks.

Frost & Sullivan finds that floLIVE's solutions offer unparalleled scalability, security, and operational efficiency in an industry hindered by legacy systems.

The company combines a cloud-native framework, intelligent SIM management, and private network capabilities to tailor solutions that meet customers' evolving requirements. By eliminating the barriers between global coverage and local connectivity, floLIVE helps customers stay ahead of market demands while shaping cost-efficient and future-ready connectivity ecosystems.

<sup>10</sup> <https://frolive.net/5g-network/>



## Bolstering Business through Excellent Customer Experience and Strategic Synergies

As a customer-centric company, floLIVE facilitates global, 24/7/365 service through phone, live chat, and electronic mail. It also provides regional support through its North America, Europe, and China offices. The company allows users to set up alerts to spot abnormal activity and faulty devices while deriving real-time data usage insights. Moreover, floLIVE's support teams have access to the bits and bytes of customers' devices' connectivity and network infrastructure, which enables them to detect, troubleshoot, and address any problems, ensuring advanced service monitoring. The company's service team boasts a 4.91 out of 5 client satisfaction rating<sup>11</sup>, demonstrating its attention to customer care. With prominent names (like SONY, Netafim, Roambee, and Bermad) among its successful case studies, floLIVE has established a solid reputation for delivering excellence.

floLIVE reinforces its technological leadership and market position by showcasing its solutions at various global industry events, such as Mobile World Congress (Barcelona), IoT Evolution (Florida), and CES 2025 (Las Vegas). In addition, the company's industry partnerships foster new growth opportunities, fueling continuous business expansion. With its rich IoT library featuring webinars, videos, and whitepapers, floLIVE educates the industry and customers, fortifying its position as a thought leader and innovator.

In February 2025, hiSky (a provider of satellite Industrial IoT connectivity solutions) and floLIVE collaborated to integrate the latter's global IoT SIMs with hiSky's Smartellite™ hybrid solution. This development empowers smooth connectivity across satellite and terrestrial networks, prompting frictionless, cost-effective communication for IoT applications, even in the most remote locations.<sup>12</sup> In October 2024, LifeSigns partnered with floLIVE and Hetrogenous to introduce LifeConnect, a connected ambulance solution revolutionizing emergency medical response through cutting-edge 5G IoT™ technology, real-time patient monitoring, and streamlined data transmission.

floLIVE understands that market agility is crucial to business and customer success. Therefore, it actively enhances its solutions and innovates new offerings to stay ahead of shifting demands. For example, in February 2025, the company announced its global Voice over LTE (VoLTE) service that supports audible inbound and outbound communications with IoT devices incorporating a floLIVE SIM. The same month, floLIVE launched its Local Breakout Service for MNOs and mobile virtual network operators that support IoT and industrial applications.

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<sup>11</sup> floLIVE Global Connectivity Solutions for Enterprises (floLIVE, January 2025)

<sup>12</sup> <https://frolive.net/blog/hisky-expands-hybrid-connectivity-solution-to-smartellite-dynamic-16x16-terminals-in-collaboration-with-frolive/>

## Conclusion

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*Harnessing a decade of research and development (R&D), industry knowledge, global reach, and commitment to innovation, floLIVE has emerged as a pioneering force in the smart connectivity space. The company's customer-first approach, comprehensive solutions, intelligent Subscriber Identity Module management, and rapid worldwide expansion set it apart as a technology leader in smart connectivity. By integrating cloud-native architectures with satellite coverage, floLIVE surpasses traditional solutions and tailors high-performing, cost-efficient offerings to meet customers' shifting needs.*

*The company's strategic partnerships and proactive R&D highlight its market agility. Its innovative technology enables real-time device network monitoring, augmented security, broad scalability, and strict adherence to regulations, proving its potential to transform the market. With the industry inclining toward fifth-generation private networks and compliant connectivity models, Frost & Sullivan concludes that floLIVE is uniquely positioned to adapt, innovate, and introduce new standards for advanced connectivity solutions.*

*With its strong overall performance, floLIVE earns the 2025 Frost & Sullivan Global Enabling Technology Leadership Award in the smart connectivity industry.*



## What You Need to Know about the Enabling Technology Leadership Recognition

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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®

## 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™.

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### 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)**

