FROST & SULLIVAN

BEST PRACTICES

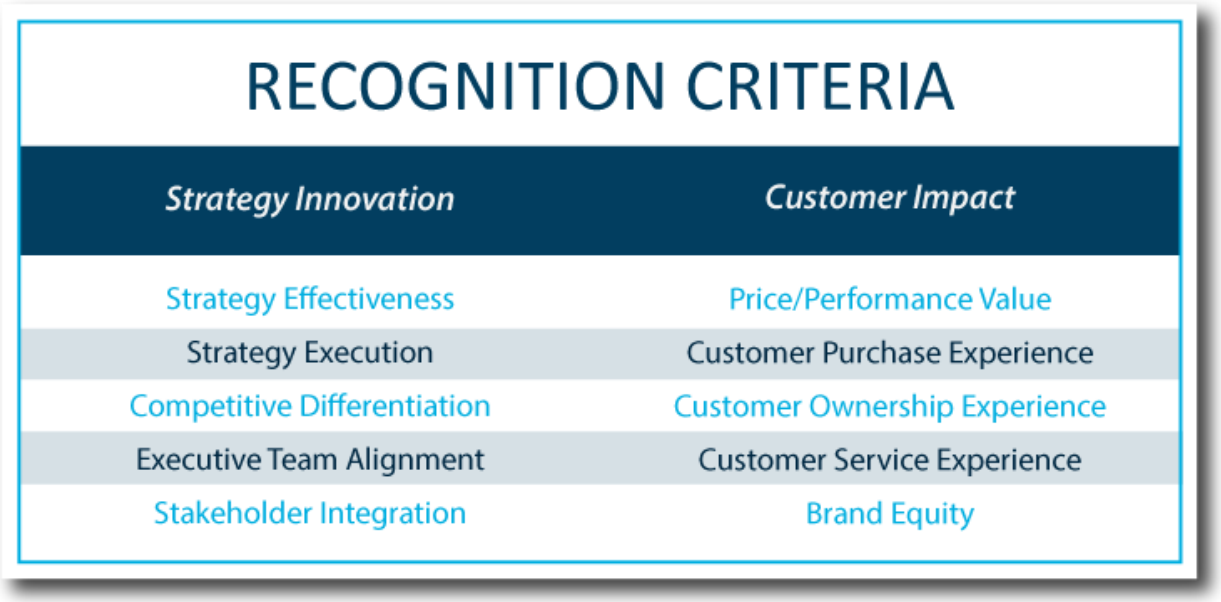
# 2026 GLOBAL DNS SECURITY

## COMPETITIVE STRATEGY LEADERSHIP

digicert®

## 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. DigiCert excels in many of the criteria in the DNS Security space.




## The Transformation of the DNS Security Industry

Domain name system (DNS) security underpins the reliability of digital services as it governs how requests are translated into actual destinations across the internet. If this layer is compromised, users and systems can be redirected without any visible indication, making it a high-value target for attackers. Protecting DNS therefore requires more than basic availability; it demands validation mechanisms, continuous monitoring, and safeguards against manipulation at scale. Modern approaches focus on ensuring data integrity, detecting anomalous query behavior, and maintaining consistent configurations across distributed environments. In addition, DNS plays a central role in maintaining service continuity, enabling rapid rerouting and isolation of failures so that disruptions, whether accidental or malicious, do not cascade across dependent systems.

The public key infrastructure (PKI) layer provides the assurance that the endpoints reached through DNS are legitimate and that communications are protected. It does this by binding identities to cryptographic credentials, allowing systems to verify each other before exchanging data. As digital ecosystems expand to include cloud workloads, APIs, and machine-driven interactions, managing these credentials becomes increasingly complex and time sensitive. Automated issuance, renewal, and revocation are essential to avoid lapses in trust, especially as cryptographic standards evolve. In combination, DNS and PKI create a complementary security model: one governs how connections are established, while the other ensures those connections can be trusted, forming a critical backbone for secure and reliable online interactions.

## A Bridge Between Two Critical Layers

DigiCert's DNS portfolio, anchored by its UltraDNS managed DNS service, reflects a clear strategic shift toward positioning DNS as a core trust and continuity layer rather than only an infrastructure component. Historically recognized as a leader in PKI and certificate lifecycle management, DigiCert converges DNS and PKI to address a new set of operational and security challenges driven by shrinking certificate lifetimes, increasing automation requirements, and a rapidly expanding attack surface. Within this context, DNS is no longer just a resolution service; it is becoming the first and most critical decision point on the internet, responsible not only for directing traffic but also for enforcing trust, resilience, and policy at scale. DigiCert's broader mission aligns with this transformation, aiming to ensure that every connection, whether from a user, application, or autonomous system, reaches a trusted destination.

> *"For customers adopting both UltraDNS and Trust Lifecycle Manager, the value of this integration becomes immediately apparent. By linking the solutions, organizations can automate domain control validation directly through DNS, eliminating the need for manual coordination or third-party automation. Certificate issuance, renewal, and revocation are handled seamlessly within the platform, transforming what was previously a fragmented, error-prone process into a unified lifecycle."*
>
> ***- Ozgun Pelit,***
> ***Sr. Industry Analyst***

At the center of this evolution is DigiCert's effort to bridge the longstanding divide between DNS and PKI teams. In most enterprises, these functions operate in isolation, with separate tools, governance models, and workflows. DigiCert addresses this fragmentation through deep, native integration between UltraDNS and its Trust Lifecycle Manager solutions. This integration establishes a secure and governed bridge between the two domains, enabling shared workflows while preserving role-based access control. DNS administrators retain authority over zones and records, while certificate owners can manage validation processes within defined permissions. This model creates trust between two historically separate functions and architectures, reducing operational friction while maintaining enterprise-grade governance.

For customers adopting both UltraDNS and Trust Lifecycle Manager, the value of this integration becomes immediately apparent. By linking the solutions, organizations can automate domain control validation directly through DNS, eliminating the need for manual coordination or third-party automation. Certificate issuance, renewal, and revocation are handled seamlessly within the DigiCert ONE platform, transforming what was previously a fragmented, error-prone process into a unified lifecycle. This integration reduces operational overhead while improving reliability and speed, particularly in large-scale environments where managing thousands of certificates can otherwise become a significant burden.

This convergence of DNS and PKI is particularly important in the context of crypto-agility and resiliency. As certificate validity periods continue to shrink and regulatory expectations increase, organizations must be able to issue, rotate, and revoke certificates rapidly and reliably. DigiCert addresses this need by embedding certificate workflows directly into DNS operations, using DNS-based validation as a scalable and automated mechanism for certificate issuance. By leveraging UltraDNS's globally distributed and highly redundant infrastructure, these processes are protected against latency, outages, and regional

disruptions. In this model, DNS becomes not just a dependency for PKI, but a resilience layer that ensures cryptographic operations can be executed continuously and at scale.

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The industry-wide shift toward DNS-based domain control validation further reinforces DigiCert's approach. DNS validation is increasingly the preferred method for certificate issuance due to its scalability and reliability compared to alternatives. DigiCert simplifies this process by enabling automated creation and management of validation records within UltraDNS, allowing organizations to issue certificates without ongoing manual intervention. Once integrated, the platform manages the full lifecycle, ensuring that certificates remain valid and up to date even as operational complexity grows.

### Platform Strategy to Serve All Needs

At the infrastructure level, UltraDNS is designed to support mission-critical availability and advanced traffic control requirements. It enables organizations to operate both primary and secondary DNS within a single platform, supported by two fully independent DNS networks. This architecture emphasizes global Anycast delivery, native DDoS protection, and automated synchronization between primary and secondary zones in seconds, ensuring consistent performance and high availability. Advanced traffic management capabilities, including real-time health checks, intelligent routing, and multi-CDN orchestration, allow enterprises to dynamically route traffic away from degraded services or regional outages without manual intervention. DigiCert further extends this capability by introducing cost-aware routing policies, enabling organizations to balance performance, resilience, and CDN spend through DNS-level controls.

DigiCert's platform strategy also reflects a deliberate effort to serve organizations across the full spectrum of size and complexity. Through the integration of DNS Made Easy and Constellix with UltraDNS, DigiCert has built a unified DNS solution that combines simplicity and accessibility with enterprise-grade performance and resilience. SMB customers can enter through a self-service model, purchasing DNS and certificates together in a single transaction via the Essentials package. This offering provides straightforward, usage-based pricing tied to query volume, while leveraging the same global infrastructure that supports large enterprises. As these customers grow, they can transition seamlessly to more advanced UltraDNS capabilities, creating a natural lifecycle from entry-level adoption to enterprise-scale deployment.

Beyond availability and performance, DigiCert is extending DNS into the domain of security and governance through DNS posture management. This capability provides continuous visibility into DNS configurations, identifying risks such as misconfigurations and deviations from best practices. By aggregating insights across both DigiCert-managed and third-party DNS environments, the platform offers a comprehensive view of an organization's DNS posture. Planned enhancements include benchmarking

against industry standards, scoring mechanisms to assess overall health, and AI-driven insights that provide actionable recommendations. This approach shifts DNS from a reactive infrastructure component to a proactive security control plane.

DigiCert further differentiates its platform through capabilities such as HTTPS web forwarding, which tightly integrate DNS and PKI to address real-world operational challenges. This functionality allows organizations to secure and redirect traffic for parked, unused, or transitional domains, automatically provisioning and deploying certificates at scale. Particularly valuable in merger and acquisitions scenarios, this allows large domain portfolios to be managed securely and efficiently. By automating certificate issuance and renewal alongside DNS-based redirection, DigiCert reduces operational complexity while minimizing security risks and ensuring consistent user experiences.

Underlying all of these capabilities is DigiCert's vertically integrated approach to DNS infrastructure. Unlike many providers that rely on third-party networks or partial outsourcing, DigiCert fully manages its DNS stack, including network, hardware, software, and operations. UltraDNS operates across a globally distributed anycast network with dozens of points of presence and extensive peering relationships, handling trillions of queries each month. The platform is designed with significant overprovisioning and built-in DDoS protection, ensuring that it can absorb traffic spikes and withstand large-scale attacks without service degradation. This level of control extends to redundancy at every layer, including independent DNS networks and operational teams, enabling organizations to achieve high levels of resilience within a single vendor ecosystem.

### An Intelligent Trust Fabric

Importantly, DigiCert extends the concept of redundancy beyond DNS into the PKI layer. By integrating certificate lifecycle management directly into the DNS solution, DigiCert enables organizations to achieve continuity across both resolution and trust services without relying on multiple providers. Synchronization between primary and secondary DNS environments is automated, and certificate operations are embedded within the same workflows, reducing architectural complexity while enhancing reliability. This unified model challenges the traditional assumption that resilience requires multiple vendors, offering instead a tightly integrated platform that delivers redundancy and trust cohesively.

Looking ahead, DigiCert articulates a vision in which DNS evolves into an intelligent trust fabric, enriched by real-time analytics, automation, and AI-driven insights. Future capabilities will expand DNS posture management, enhance visibility across hybrid environments, and explore new use cases such as machine-to-machine identity and autonomous systems. By unifying DNS, PKI, and automation into a single platform, DigiCert is positioning itself not just as a DNS provider or certificate authority, but as a digital trust authority. In this model, DNS becomes the foundation for enforcing trust at scale, ensuring that every connection is not only resolved efficiently, but verified, secure, and continuously trusted.

## Conclusion

DNS security is critical as it controls how users and systems are directed across the internet, making it a primary target for disruption and manipulation. At the same time, PKI ensures that those destinations are authentic and that communications remain secure through encryption and identity validation. Bringing DNS and PKI closer together strengthens overall trust by aligning traffic control with identity assurance, enabling more resilient and automated security across digital environments.

For its strong overall performance, DigiCert is presented with Frost & Sullivan's 2026 Global Competitive Strategy Leadership Recognition in the DNS security industry.

# What You Need to Know about the Competitive Strategy Leadership Recognition

Frost & Sullivan's Competitive Strategy Leadership Recognition identifies the company with a standout approach to achieving top-line growth and a superior customer experience.

## Best Practices Recognition Analysis

For the Competitive Strategy Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

### Strategy Innovation

**Strategy Effectiveness**: Effective strategy balances short-term performance needs with long-term aspirations and overall company vision

**Strategy Execution**: Company strategy utilizes best practices to support consistent and efficient processes

**Competitive Differentiation**: Solutions or products articulate and display unique competitive advantages

**Executive Team Alignment**: Executive team focuses on staying ahead of key competitors via a unified execution of its organization's mission, vision, and strategy

**Stakeholder Integration**: Company strategy reflects the needs or circumstances of all industry stakeholders, including competitors, customers, investors, and employees

### Customer Impact

**Price/Performance Value**: Products or services offer the best ROI and superior value compared to similar market offerings

**Customer Purchase Experience**: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

**Customer Ownership Excellence**: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

**Customer Service Experience**: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

**Brand Equity**: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

# Best Practices Recognition Analytics Methodology

## Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

| | | VALUE IMPACT | |
|---|---|---|---|
| STEP | | WHAT | WHY |
| 1 | **Opportunity Universe** | Identify Sectors with the Greatest Impact on the Global Economy | Value to Economic Development |
| 2 | **Transformational Model** | Analyze Strategic Imperatives That Drive Transformation | Understand and Create a Winning Strategy |
| 3 | **Ecosystem** | Map Critical Value Chains | Comprehensive Community that Shapes the Sector |
| 4 | **Growth Generator** | Data Foundation That Provides Decision Support System | Spark Opportunities and Accelerate Decision-making |
| 5 | **Growth Opportunities** | Identify Opportunities Generated by Companies | Drive the Transformation of the Industry |
| 6 | **Frost Radar** | Benchmark Companies on Future Growth Potential | Identify Most Powerful Companies to Action |
| 7 | **Best Practices** | Identify Companies Achieving Best Practices in All Critical Perspectives | Inspire the World |
| 8 | **Companies to Action** | Tell Your Story to the World (BICEP*) | Ecosystem Community Supporting Future Success |

*Board of Directors, Investors, Customers, Employees, Partners

## About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at http://www.frost.com.

### The Growth Pipeline Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is 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)