

## **Customer Value Enhancement Award SSL Certificate North America, 2011**

### **Frost & Sullivan's Global Research Platform**

Frost & Sullivan is in its 50th year in business with a global research organization of 1,800 analysts and consultants who monitor more than 300 industries and 250,000 companies. The company's research philosophy originates with the CEO's 360 Degree Perspective™, which serves as the foundation of its TEAM Research™ methodology. This unique approach enables us to determine how best-in-class companies worldwide manage growth, innovation and leadership. Based on the findings of this Best Practices research, Frost & Sullivan is proud to present the 2011 North American Customer Value Enhancement Award in the SSL Certificate market to DigiCert, Inc. (DigiCert).

### **Significance of the Customer Value Enhancement Award**

#### **Key Industry Challenges Addressed by Superior Customer Initiatives**

The role the SSL certificate market plays in the overall network security industry is built upon trust in use and transmission of data. However, Frost & Sullivan notes that within the past year the trust factor of the market has been scrutinized. The threat of attacks and data breaches has increased. The fear of valid certificates used for phishing attacks has put the industry on notice. In a market built around trust between the issuing certificate authority, domain owner, and user, the news of valid certificates issued for fraudulent activities puts the validity of the process of issuing a certificate at question. Certificate authorities with a history of providing transparent and high-level authentication methods before issuing a certificate will have less of a problem facing questions on business practices. However, this can affect smaller certificate authorities and shift business to a more reputable certificate authority.

Frost & Sullivan independent research confirms that the SSL certificate market is becoming commoditized. As a result of commoditization, certificate vendors are struggling to differentiate their products among other competitors. Certificate authorities have begun using different features in their certificates or issuing process to differentiate their products. Malware scanning on a Web site, quick turnaround of a purchased certificate, 24/7 customer support, and high-level validation methods are but some of the methods that certificate authorities are using to differentiate themselves. While these additional features are important to customers, Frost & Sullivan feels that trust remains the key factor for purchasing an SSL certificate from a vendor. A reputable certificate authority with no history of breaches will attract business easier than one that has experienced issues. A

strong brand is just as important in the SSL certificate market as additional features and services.

### **Impact of Customer Value Enhancement Award on Key Stakeholders**

The Customer Value Enhancement Award is a prestigious recognition of DigiCert's accomplishments in the SSL certificate market. As captured in Chart 1 below, by researching, ranking, and recognizing those who deliver excellence and best practices in their respective endeavors, Frost & Sullivan hopes to inspire, influence, and impact three specific constituencies:

- **Investors**

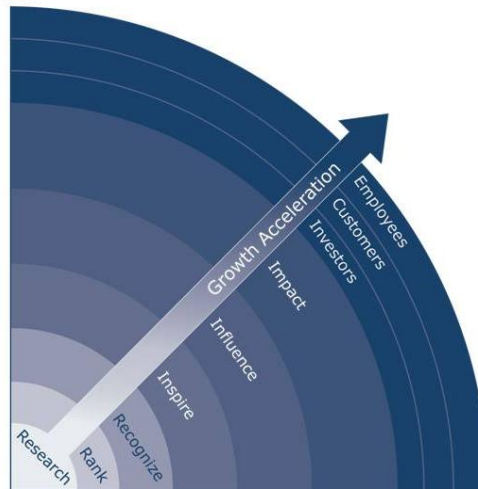
Investors and shareholders always welcome unbiased and impartial third-party recognition. Similarly, prospective investors and shareholders are drawn to companies with a well-established reputation for excellence. Unbiased validation is the best and most credible way to showcase an organization worthy of investment.

- **Customers**

Third-party industry recognition has been proven to be the most effective way to assure customers that they are partnering with an organization that is leading in its field.

- **Employees**

This Award represents the creativity and dedication of DigiCert's executive team and employees. Such public recognition can boost morale and inspire these stakeholders to continue the best-in-class pursuit of a strong competitive position for DigiCert.

**Chart 1: Best Practices Leverage for Growth Acceleration**

### Best Practice Award Analysis for DigiCert

The Frost & Sullivan Customer Value Enhancement Award is presented each year to the company that has demonstrated excellence in implementing strategies that proactively create value for its customers with a focus on improving the return on the investment that customers make in its services or products. This Award recognizes the company's inordinate focus on enhancing the value that its customers receive, beyond simply good customer service, leading to improved customer retention and ultimately customer base expansion.

### DigiCert's Performance in SSL Certificate Market

DigiCert, a premier provider of high-assurance certificates, is a major player in the SSL certificate market, providing SSL certificates to mid-tier and top-tier customers including many leading government, education and Fortune® 500 organizations. In Frost & Sullivan's independent analysis of the SSL certificate market, DigiCert ranked third in market share, by sales, of high-assurance certificates.

### Key Performance Drivers for DigiCert

#### Factor 1: Innovative Wildcard Certificate

DigiCert understands the challenges IT administrators face daily in having to manage hundreds to thousands of certificates. For administrators who run multiple sub domains or have multiple servers requiring them to purchase multiple certificates for their networks, the process can become costly and a burden to manage. Wildcard certificates provide administrators with the ability to apply one Wildcard certificate to encrypt multiple sub domains and servers.

In 2010, DigiCert released its Wildcard certificate. While some of DigiCert's competitors offer Wildcard certificates that only cover one, the first-level, or a limited number of sub domains, DigiCert decided to take a bold step in favor of its customers. The company's Wildcard certificate encrypts and secures any sub domain of the domain the certificate was issued to using subject alternative names (SANs).

DigiCert's Wildcard certificate also provides unlimited server license with the ability to generate separate certificates with unique key pairs for each server. SHA-2/SHA-1 options for PCI compliance are available to organizations. DigiCert provides the ability to add SANs to Wildcard certificates in order for an organization's certificate to be compatible for mobile devices. The certificate is also IIS 6 and Apache compatible to use a wildcard certificate to secure multiple sites with virtual hosting.

### **Factor 2: Focused Target Markets**

The SSL certificate market is broken down into three distinct markets within each certificate type. Domain validation, organization validation, and extended validated certificate customers require different needs from their certificates and serve different organization tier levels. While many certificate authorities choose to offer all three types of certificates, some forgo this option to establish their position and brand in the markets they choose to serve.

As a leading company in the mid- to top-tier of the SSL certificate market, DigiCert centers its products on organization validation and extended validated certificates, which offer an extra layer of validation and a higher level of assurance than domain validation certificates. While price sensitivity at these levels is not as high as with domain validation certificate customers, DigiCert aims to provide a commendable, high-value certificate at competitive pricing. Frost & Sullivan firmly believes that DigiCert's commitment to the highest quality, cost effective security nicely represents the company's effort to provide best-in-class products for its respective target markets.

### **Factor 3: Flexible Certificate Capabilities**

Managing hundreds to thousands of certificates can be difficult for any IT administrator. DigiCert aims to provide the tools and flexibility to help tailor certificate options to an organization's need. DigiCert differentiates itself from the competition through several features. Its Wildcard certificate is unlike any other in the market, with the ability to secure any sub domain of a domain. The company also provides automated testing services to notify customers if their certificate is not properly installed 7 days after issuance. Customers have the ability to change domain names on certificates as needed, and the new domain will be validated at no extra charge. Unified communications (UC) certificate customers have the ability to add, remove, or edit SANs from within their account throughout the certificate lifetime. In addition, UC and wildcard customers have the ability to issue free duplicate certificates assigned to unique private keys. DigiCert offers this security feature so that organizations do not have to export and install the same certificate on multiple systems.

These key differentiators have positioned the company to effectively compete in the market, placing them. Frost & Sullivan expects further market growth from DigiCert going into 2012.

### Conclusion

Frost & Sullivan proudly recognizes DigiCert as the 2011 Customer Value Enhancement Award recipient in the SSL certificate space. DigiCert’s efforts to provide its customers cost-effective, best-in-class certificates with high-level features solidify the company’s position in the SSL certificate market when benchmarked against competing solutions.

### The CEO 360 Degree Perspective™ - Visionary Platform for Growth Strategies

The CEO 360 Degree Perspective™ model provides a clear illustration of the complex business universe in which CEOs and their management teams live today. It represents the foundation of Frost & Sullivan's global research organization and provides the basis on which companies can gain a visionary and strategic understanding of the market. The CEO 360 Degree Perspective™ is also a “must-have” requirement for the identification and analysis of best-practice performance by industry leaders.

The CEO 360 Degree Perspective™ model enables our clients to gain a comprehensive, action-oriented understanding of market evolution and its implications for their companies’ growth strategies. As illustrated in Chart 5 below, the following six-step process outlines how our researchers and consultants embed the CEO 360 Degree Perspective™ into their analyses and recommendations.

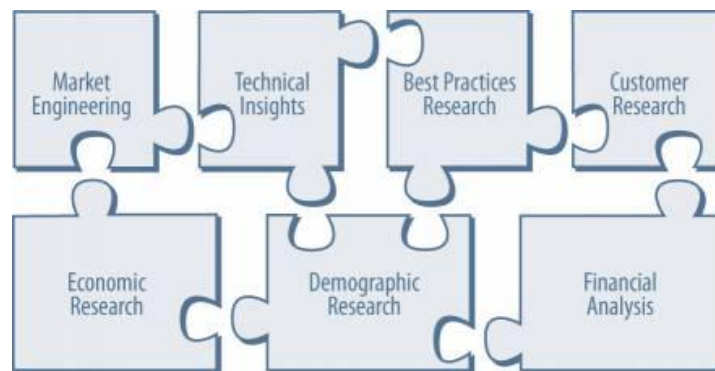
**360 Degree Perspective™ Model**



## Critical Importance of TEAM Research

Frost & Sullivan's TEAM 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 seven of Frost & Sullivan's research methodologies. Our experience has shown over the years that companies too often make important growth decisions based on a narrow understanding of their environment, leading to errors of both omission and commission. Frost & Sullivan contends that successful growth strategies are founded on a thorough understanding of market, technical, economic, financial, customer, best practices, and demographic analyses. In that vein, the letters T, E, A and M reflect our core technical, economic, applied (financial and best practices) and market analyses. The integration of these research disciplines into the TEAM Research methodology provides an evaluation platform for benchmarking industry players and for creating high-potential growth strategies for our clients.

**Chart 3: Benchmarking Performance with TEAM Research**



## About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, enables clients to accelerate growth and achieve best-in-class positions in growth, innovation and leadership. The company's Growth Partnership Service provides the CEO and the CEO's Growth Team with disciplined research and best-practice models to drive the generation, evaluation and implementation of powerful growth strategies. Frost & Sullivan leverages 50 years of experience in partnering with Global 1000 companies, emerging businesses and the investment community from more than 40 offices on six continents. To join our Growth Partnership, please visit <http://www.frost.com>.