Product Line Strategy 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 Product Line Strategy Award in the SSL certificate market to GlobalSign.
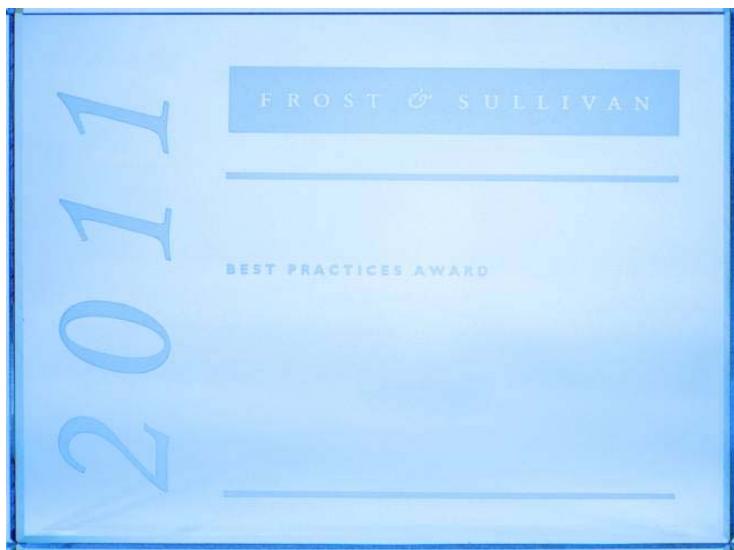
Significance of the Product Line Strategy Award

Key Industry Challenges Addressed by Product Line Strategy

The role the SSL certificate market plays in the overall network security industry is built upon trust in use and transmission of data. However, in the past year the trust factor of the market has been damaged. 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.

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 include some methods certificate authorities are using to differentiate themselves. While these additional features are important to customers, trust remains the key factor for purchasing and SSL certificate from a vendor. A reputable company with no history of breaches will find business easier than a certificate authority that has gone through issues. A strong brand is just as important in the SSL certificate market as additional features and services.

Impact of Product Line Strategy Award on Key Stakeholders

The Product Line Strategy Award is a prestigious recognition of GlobalSign's accomplishments in the SSL certificate market. An unbiased, third-party recognition can provide a profound impact in enhancing the brand value and accelerating GlobalSign's growth. 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 GlobalSign's executive team and employees. Such public recognition can boost morale and inspire your team to continue its best-in-class pursuit of a strong competitive position for GlobalSign.

Chart 1: Best Practices Leverage for Growth Acceleration
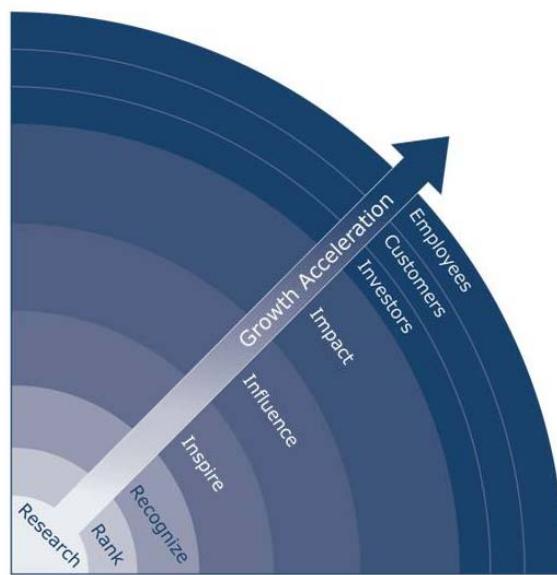
## Key Benchmarking Criteria for Product Line Strategy Award

For the Product Line Strategy Award, the following criteria were used to benchmark GlobalSign's performance against key competitors:

- Breadth of Product Line

- Size of Addressable Customer Base

- Impact on Customer Value

- Impact on Market Share

- Breadth of Applications/Markets Served

Decision Support Matrix and Measurement Criteria

To support its evaluation of best practices across multiple business performance categories, Frost & Sullivan employs a customized Decision Support Matrix (DSM). The DSM is an analytical tool that compares companies' performance relative to each other with an integration of quantitative and qualitative metrics. The DSM features criteria unique to each Award category and ranks importance by assigning weights to each criterion. The relative weighting reflects current market conditions and illustrates the associated importance of each criterion according to Frost & Sullivan. Fundamentally, each DSM is distinct for each market and Award category. The DSM allows our research and consulting teams to objectively analyze each company's performance on each criterion relative to its top competitors and assign performance ratings on that basis. The DSM follows a 10-point scale that allows for nuances in performance evaluation; ratings guidelines are shown in Chart 2.

Chart 2: Performance-Based Ratings for Decision Support Matrix
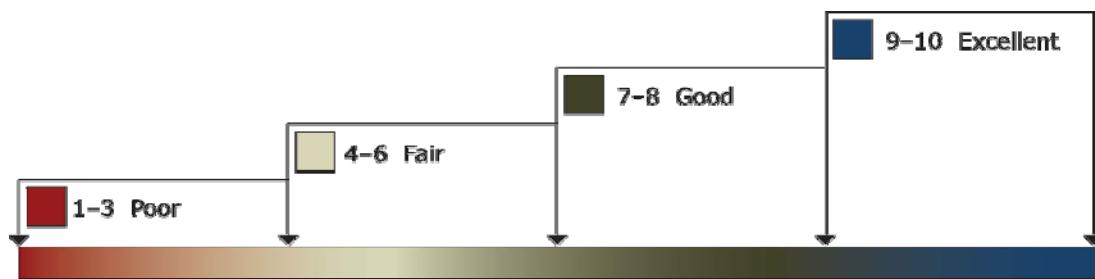
This exercise encompasses all criteria, leading to a weighted average ranking of each company. Researchers can then easily identify the company with the highest ranking. As a final step, the research team confirms the veracity of the model by ensuring that small changes to the ratings for a specific criterion do not lead to a significant change in the overall relative rankings of the companies.

Chart 3: Frost & Sullivan's 10-Step Process for Identifying Award Recipients

Best Practice Award Analysis for GlobalSign

The Decision Support Matrix, shown in Chart 4, illustrates the relative importance of each criterion for the Product Line Strategy Award and the ratings for each company under evaluation. To remain unbiased while also protecting the interests of the other organizations reviewed, we have chosen to refer to the other key players as Competitor 1 and Competitor 2.

Chart 4: Decision Support Matrix for
Product Line Strategy Award

Measurement of 1–10 (1 = lowest; 10 = highest)	Award Criteria					
	Breadth of Product Line	Size of Addressable Customer Base	Impact on Customer Value	Impact on Market Share	Breadth of Applications/Markets Served	Weighted Rating
Relative Weight (%)	**20%**	**20%**	**20%**	**20%**	**20%**	**100%**
GlobalSign	9.0	8.0	10.0	9.0	10.0	9.2
Competitor 1	8.5	9.0	9.0	9.0	9.0	8.9
Competitor 2	8.0	8.0	9.0	7.0	8.0	8.0

Criterion 1: Breadth of Product Line

GlobalSign provides Domain Validated (DV), Organization Validated(OV), and Extended Validation(EV) SSL Certificates. The company also offers Wildcard and Multi-Domain SSL Certificates. In an effort to provide a cost-effective domain validated certificate for consumers, particularly in the hosting vertical, GlobalSign launched their low-end brand, AlphaSSL.

GlobalSign is known as one of the leaders and pioneers of multi-domain SSL and free support for Unified Communications applications. The company provides subscribers of this certificate with an easy to use interface to manage Subject Alternative Names (SAN) in SSL Certificates.

Additional products and services provided by GlobalSign include: OneClickSSL, CloudSSL, Managed SSL v2, and malware scanning.

OneClickSSL turns the manual certificate lifecycle into a fully automated process that provides installation of an SSL Certificate in less than a minute. The solution automates the entire SSL provisioning process including the certificate signing request (CSR generation), application process, vetting, installation and binding of the SSL to the web server.

CloudSSL allows organizations to use a certificate across virtualized environments without the restrictions of having to purchase additional licenses. CloudSSL partners make on-demand requests for SSL Certificates, including their customers within their own certificates.

CloudSSL provides organizations with the same level of authentication and security features of the GlobalSign SSL brand.

Managed SSL v2, GlobalSign's new managed SSL platform provides organizations with highly scalable means of managing multiple SSL across the simplest to most complex organizations. Including multiple profiles, allowing an organization to register all its companies, branches, and departments in a managed service, hosted by GlobalSign giving large, distributed organizations an alternative to hosting their own Certificate Authorities.

Criterion 2: Size of Addressable Customer Base

GlobalSign provides SSL Certificates for companies of all sizes. The company's sweet spot is at the mid-tier level. Mid-tier companies consist of primarily small, medium enterprises (SMEs). These customers are price sensitive, brand aware, need account managers, and need automation. Howevever, GlobalSign has been aggressively moving into gaining more exposure at the enterprise level. With its efforts now more focused on the enterprise, the company has gained significant traction with Fortune 1000 and Fortune 500 customers.

GlobalSign's OneClickSSL, CloudSSL, and Alpha SSL also allow the company to branch out to hosting providers to expand their customer base. The company sees great potential and growth in this vertical.

Criterion 3: Impact on Customer Value

With over 15 years of participation in the SSL certificate market, GlobalSign continues to develop their products around making the life cycle of an SSL Certificate easier for its customers. Features such as AutoCSR, free unified communications support, and a quick online renewal wizard eliminates the dependence of weak keys and greatly reduces customer support issues.

To eliminate the budget burden of having to purchase extra certificates for multiple servers, GlobalSign offers its customers unlimited server licenses. In addition, GlobalSign offers multi-domain certificates which cover up to forty different sub domains with one certificate. One GlobalSign SSL Certificate also provides encryption for both the 'www' and the 'non-www' version of the domain.

The value OneClickSSL provides hosting providers is the ability to remotely "push" SSL to the customer's Web site, allowing remote activation. This greatly expedites the certificate issuing process. OneClickSSL eliminates customer errors, reduces support costs, forces minimum security requirements, and provides flexible billing models. CloudSSL is also ideal for managed service providers in the ability to support shorter term billing cycles and dynamic adding/removal of customers by a simple web service call.

Criterion 4: Impact on Market Share

In Frost & Sullivan's research service titled Analysis of the SSL Certificate Market, GlobalSign ranked sixth and fifth in SSL sales and certificates issued, respectively. GlobalSign's ability to understand the need of mid-tier organizations, including hosting providers and SMEs, has positioned the company to continue to succeed in the SSL certificate market.

Criterion 5: Breadth of Applications/Markets Served

Although the company has a strong focus on the mid-tier market, GlobalSign's SSL certificates are available to organizations of all sizes. GlobalSign is also keen on addressing the challenges hosting providers face in issuing certificates to organizations rapidly. However, the company develops its products to be adaptable for customers based on their specific use-case. For example, although OneClickSSL is targeted at hosting providers, GlobalSign aims to offer this solution for enterprise & hardware devices in 2012.

Conclusion

Frost & Sullivan is proud to announce GlobalSign as the 2011 Product Line Strategy Award recipient in the SSL certificate market. The company's breadth of solutions provides its customers with high assurance, flexible, cost effective solutions. The company aims to meet the challenges organizations face with SSL certificates and continue to innovate their solutions to provide best-in-class solutions.

The CEO 360-Degree Perspective^{TM} - 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.

Chart 5: How the CEO's 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 6: 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.