



**Entrust**<sup>®</sup>

Securing Digital Identities  
& Information

2013 North American SSL Certificate  
Product Leadership Award



FROST & SULLIVAN



50 Years of Growth, Innovation & Leadership

## **Product Leadership Award SSL Certificate North America, 2013**

### **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 2013 North American Product Leadership Award in the SSL Certificate market to Entrust.

### **Significance of the Product Leadership Award**

#### **Key Industry Challenges Addressed by Product Leadership**

In what many have called "The Year of the Breach", network security and trust service vendors were targets of multiple waves of attacks in 2011 that resulted in the breach of several well-recognized security vendors. While the methods attackers used to breach these vendors varied, they all prompted the same question from customers: "Can we still trust your product?"

In the SSL certificate market in particular, most certification authorities that were breached were able to move swiftly, however, a Dutch certification authority that was the primary certification authority for the Dutch government was unable to combat the severity of its attack. This ultimately resulted in the company ceasing operations. The escalating breaches of 2011 forced certificate authorities to look at their infrastructure and move to immediately resolve any potential issues. In addition, the Certification Authority/Browser Forum created baseline requirements that describe the best practices of issuing digital certificates.

All certification authorities face the challenge of a lack of customer education around the benefits of high-assurance certificates. While there is general agreement that domain validated certificates play an important role, many customers still do not fully understand the benefits of extended validation certificates. The high price tag of extended validated certificates continues to slow adoption. Customers have shown a preference towards organization validation certificates, as they are less expensive than extended validated certificates; however, they still offer a reasonable level of identity assurance. Certificate authorities that invest in educating the market on differences and benefits of each certificate type will gain recognition and market share in the SSL certificate market.

## Impact of Product Leadership Award on Key Stakeholders

The Product Leadership Award is a prestigious recognition of Entrust's accomplishments in the SSL certificate market. An unbiased, third-party recognition can provide a profound impact in enhancing the brand value and accelerating Entrust'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**

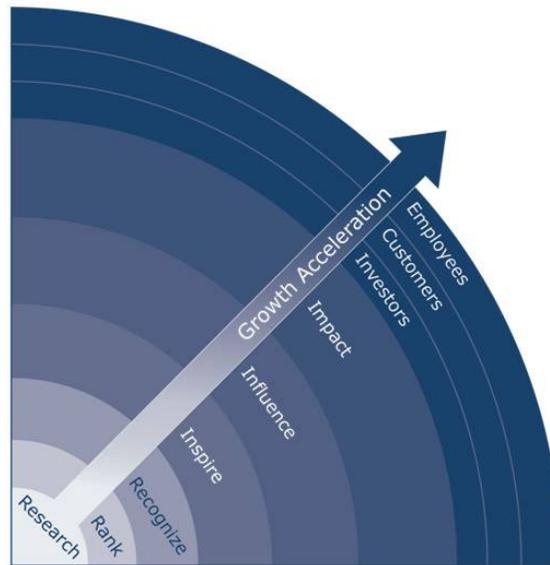
Investors and shareholders always welcome unbiased and impartial third-party recognition. Similarly, prospective investors and shareholders are drawn to companies with a well-established reputation for excellence. Unbiased validation is the best and most credible way to showcase an organization worthy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

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

### Key Benchmarking Criteria for Product Leadership Award

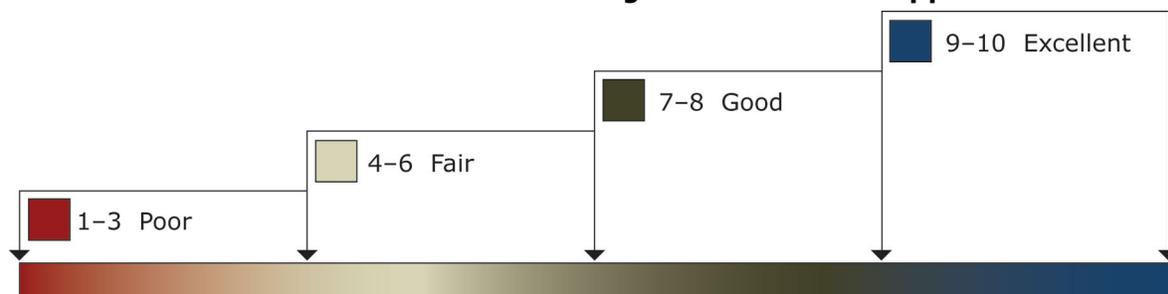
For the Product Leadership Award, the following criteria were used to benchmark Entrust's performance against key competitors:

- Product Features/Functionality
- Innovative Element of the Product
- Product Acceptance in the Marketplace
- Provides Customer Value Enhancements
- Product Quality

## 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 Chart2.

**Chart2: 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.

**Chart3: Frost & Sullivan's 10-Step Process for Identifying Award Recipients**



## Best Practice Award Analysis for Entrust

The Decision Support Matrix, shown in Figure 4, illustrates the relative importance of each criterion for the Product Leadership of the Year Award and the ratings for each company under evaluation. To protect the interests of the award recipient’s competitors, we have chosen to refer to them as Competitor 1 and Competitor 2.

**Figure 4: Decision Support Matrix for Product Leadership Award**

<i>Measurement of 1-10 (1 = lowest; 10 = highest)</i>	<b>Award Criteria</b>					<b>Weighted Rating</b>
	Features/Functionality	Innovative Element of the Product	Product Acceptance in the Marketplace	Provides Customer Value Enhancements	Product Quality	
<b>Relative Weight (%)</b>	<b>20%</b>	<b>20%</b>	<b>20%</b>	<b>20%</b>	<b>20%</b>	<b>100%</b>
Entrust	10	10	10	10	10	10.00
Competitor 1	9	9	10	9	9	9.20
Competitor 2	8	7	9	9	9	8.40

### Criterion 1: Product Features/Functionality

As an identity-based security vendor, Entrust understands the need to provide flexible solutions that will enable its customers to secure their assets. Entrust prides itself in offering digital certificates and accompanying solutions that provide strong security and trust services.

With a strong focus on the enterprise, government and financial services market, Entrust only offers high-assurance certificates. The company believes that organization and extended validation certificates provide the highest levels of security in order to ensure the ultimate and safest level of trust and confidence between a user and the websites they are visiting. Although the company only offers high-assurance certificates, its public root is ubiquitous on more than 99.9 percent of desktop and mobile browsers. Entrust’s organization certificates are also offered as unified communications multi-domain and wildcard certificates. Due to market demands, Entrust has also begun to offer its wildcard certificates with Subject Alternative Name (SAN) capabilities. Its extended validation certificates are also offered as multi-domain certificates where additional domains can be added to the Subject Alternative Name fields.

Entrust Certificate Management Service (CMS) and Discovery are solutions that provide Entrust customers the tools necessary to ease the pains of certificate management and the consequences of previous inefficient process or documentation.

## **Criterion 2: Innovative Element of the Product**

Faced with challenges of increased sophisticated threats, commoditization, and lower-priced certificates, certification authorities that only offer high assurance certificate must be able to demonstrate key differentiators in product capabilities and features to customers in order to effectively compete in the SSL certificate market.

Entrust Certificate Services, offers organization and extended validation SSL certificates in multi-form factors (e.g. Wildcard), as well as SSL certificates such as elliptic curve cryptography (ECC) hybrid SSL certificates. ECC provides the benefits of being a family of public-key algorithms that provide shorter key lengths and may provide improved performance. These certificates are compatible on most up-to-date browsers and highly effective where server-load performance is critical.

Although several certification authorities have developed certificate management systems and scanning features, Entrust offers a flexible and robust management platform that is suitable for small to large enterprise customers. Entrust Certificate Management Service provides users the choice of unit-based or concurrent license certificate models, enabling customers to choose the model that best fits their needs. Entrust Discovery allows customers to scan internal networks to look for certificates of all types, regardless of who the CA was that issued the certificate. Entrust Discovery also gives the customer a centralized portal in which they can perform the entire management life cycle for all of their certificates such as deciding for themselves when they want the certificate to expire, ability to revoke and re-use the certificate at any time. This platform also enables the customer to have all of their certificates pre-verified so that the certificates can be issued in just minutes once needed to deploy, and can be sold through Entrust's Partners and Resellers worldwide or purchased from Entrust directly.

With the advent of bring-your-own-device (BYOD) initiatives, today's businesses are struggling to ensure only approved mobile devices are connecting to corporate properties. To solve this issue using certificate-based authentication, Entrust will offer mobile device certificates — seamlessly from their Certificate Management Service (CMS) — as an easy, cost-effective solution that will help organizations balance security and leverage "BYOD" policy.

Mobile device certificates will help customers improve network security and mitigate risk, and can even be purchased in small quantities with a credit card. For administrators, simply load information about each employee you want to access your network. Likewise for employees, it's as simple as clicking on an email link and entering an out-of-band code to install the certificate.

**Criterion 3: Product Acceptance in the Marketplace**

Entrust maintains a strong focus on the enterprise, government and financial services market. As a market leader, Entrust has continually tailored its solution to meet customer needs and requirements, earning Entrust highpraise and recognition as a respected trust service provider. Entrust's continued efforts in improving its SSL certificate offering have resulted in maintaining the company's number 2 position in high-assurance certificate issuance and sales, and most importantly, overall market share.

Entrust's continued dedication to high assurance PKI services and offerings is helping the company drive greater brand awareness for its security and service offering outside of Entrust's traditionally strong government presence.

**Criterion 4: Provides Customer Value Enhancements**

With a significant portion of customers among Fortune 500 organizations, Entrust understands the necessity of providing high-level sales and service that address customer needs in an effective and efficient manner. Entrust provides a premium brand of SSL certificates at competitive pricing while never compromising product quality. Above all, Entrust understands that the leading factor in working with its customers is trust. Entrust's SSL certificates are backed by extensive validation and identity vetting, as well as encryption of the data transmission channel.

Entrust recognizes that excellent customer service plays a key role in account renewals. Its customer-friendly policies provide customers a dedicated account manager, unlimited certificate re-issues, unlimited server licenses, and certificate exchanges. These offerings have supported continuous account renewals of more than 98 percent and high satisfaction ratings on SSL certificate authority review websites, such as SSLShopper.com.

Entrust CMS enables organizations to efficiently manage certificates through administrative delegation and workflow, on-demand services, audit and reporting tools, and strong verification processes, resulting in a flexible subscription model. In 2012, Entrust updated its CMS platform with new features, including a buyer role and the ability to create unlimited custom views. This enables users to organize and report on data in a way that is most meaningful to users. CMS features a self-service portal that enables customers to create permissions for read-only users, provides access to a portal application from which they can request certificates or new clients, and allows certificate activity viewing. In addition, CMS now has approval override capabilities that enable administrators to modify and approve certificate requests instead of simply declining them.

To also meet the requirements of customers, Entrust Discovery is offered either as a software-as-a-service (SaaS) or as an on-premise solution. In 2012, Entrust updated Discovery to include certificate chain validation email alerts to ensure applications and servers are secure, automated graphic-based reports to ensure compliance, and enabled

organizations to delegate responsibilities and offered rules to automate the classification and management of certificates.

### **Criterion 5: Product Quality**

Entrust continues to invest in its infrastructure, solutions, and staff to meet the growing needs of its customers. This commitment drives the company's brand exposure in the high-assurance certificate market. In a market where differentiation within certification authorities can be difficult for customers, Entrust firmly believes its focus on trust and service have kept the company high regard. Customers look to establish relationships with certification authorities offering comprehensive products and value-added solutions. In addition, there is a balance that certification authorities and users look for: value and trust. While to a certain extent, pricing can be a key factor in a customer's certification authority selection, within the high-assurance certificate market, certification authorities with proven track records win. For this reason, Entrust only offers organization and extended validation certificates, and continues to invest in its infrastructure, solutions, and staff.

### **Conclusion**

Frost & Sullivan is proud to recognize Entrust as the 2013 SSL Certificate Product Leadership recipient. Entrust's commitment to providing solutions that meet and surpass the needs of their clients has garnered the company high praise and recognition in the SSL certificate market.

### **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.

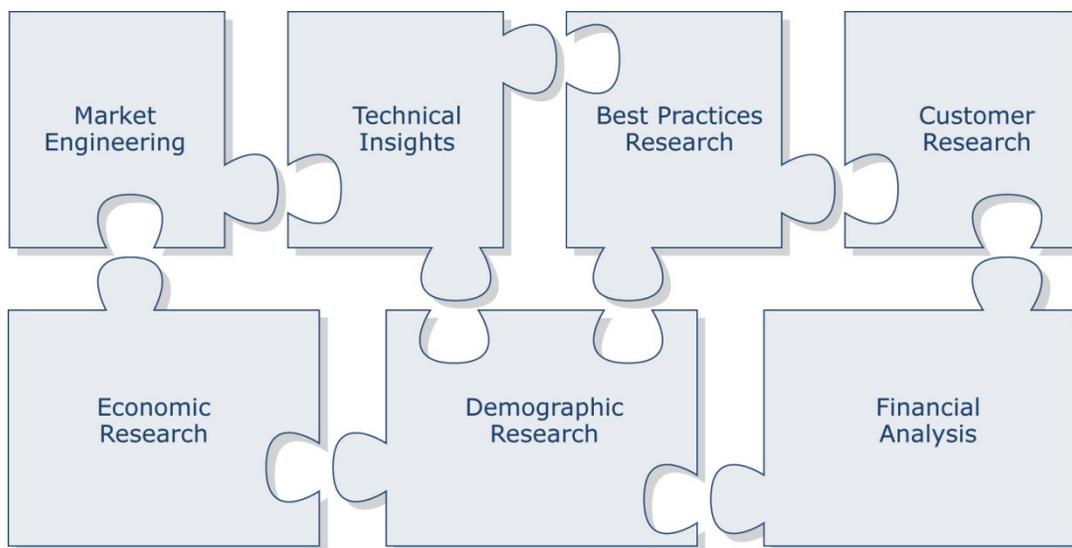
Chart5: The CEO's 360-Degree Perspective™ Model



## 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>.