FROST & SULLIVAN

BEST PRACTICES
AWARDS

2020 UNITED ARAB EMIRATES
CYBERSECURITY SERVICES
COMPANY OF THE YEAR AWARD
Contents

Letter of Congratulations ........................................................................................................3

Background and Company Performance .............................................................................4
  Industry Challenges ............................................................................................................4
  Visionary Innovation and Performance/Customer Impact .................................................4
  Conclusion ..........................................................................................................................6

Significance of Company of the Year ....................................................................................7

Understanding Company of the Year ....................................................................................7
  Key Benchmarking Criteria ...............................................................................................8

Best Practices Award Analysis for Digital14 .........................................................................8
  Decision Support Scorecard ...............................................................................................8
  Visionary Innovation & Performance ...............................................................................9
  Customer Impact ...............................................................................................................9
  Decision Support Matrix .................................................................................................10


The Intersection between 360-Degree Research and Best Practices Awards ......................12
  Research Methodology ......................................................................................................12

About Frost & Sullivan ..........................................................................................................12
Letter of Congratulations

I am proud to present you with this year’s award for Company of the Year in the United Arab Emirates (UAE) cybersecurity services industry.

Frost & Sullivan’s global teams of analysts and consultants research a wide range of markets in multiple industries and regions and identify companies that are true industry leaders, delivering best practices in growth, innovation, and leadership. These companies have a keen eye on the future and drive innovation that meets upcoming needs before they become commonly visible, often being first to market with new solutions. They focus on delivering the best products at optimal prices to maximize customer value and experience. Identifying these companies involves extensive primary and secondary research across the entire value chain of specific products and/or markets. Against the backdrop of this research, Frost & Sullivan is pleased to recognize Digital14 as the Company of the Year in the UAE cybersecurity services industry.

Delivering excellence worthy of the Company of the Year recognition is never an easy task, and it is made even more difficult considering today’s competitive intensity, customer volatility, and economic uncertainty, not to mention the difficulty of innovating in an environment of escalating challenges to intellectual property. In this context, your receipt of this award signifies an even greater accomplishment.

Moreover, Frost & Sullivan recognizes that this accomplishment is the result of many employees, customers, and investors making daily choices to support the organization and contribute in a meaningful way to its future.

I enthusiastically acknowledge and celebrate these achievements and wish you great success in the future. Frost & Sullivan is here to support you on any future endeavor.

Sincerely yours,

David Frigstad
Chairman
Frost & Sullivan
Background and Company Performance

Industry Challenges

Digital transformation and cybersecurity is steadily witnessing significant adoption and advancement across industries and is becoming a key focus for most organizations in the Middle East, specifically in the United Arab Emirates (UAE). Organizations in the UAE are showing a positive inclination toward cybersecurity services to increase their security posture, in light of, the increased threat landscape, such as mobile devices, cloud services, applications, and network protocols. For instance, many service providers and organizations are building their own digital and cybersecurity strategies to support their business transformation journey. Infrastructure, software, and related digital services are evolving rapidly, consequently widening the threat landscape.

Digital transformation initiatives are fueling the need for greater IT and OT security, industrial robustness at scale, and developer-friendly digital architecture. In addition, digital workloads tied to emerging technologies, such as Internet of Things (IoT) and Big Data, are driving novel cybersecurity measures, governance, and control. This rapid digital and technological advancement requires the UAE government to develop new regulations and policies.

The lack of cybersecurity and digital skills are additional challenges for organizations to manage and prioritize, given the fast advancements in and across the cybersecurity domain.

Visionary Innovation and Performance/Customer Impact

Growth Performance

Since its inception in 2019, Digital14 has built and cultivated valuable and deep partnerships within the government and commercial sectors to lead them through their digital transformation and cybersecurity journey.

Digital14 builds on a diverse set of practices created to launch, foster, and spearhead the development of commercial cybersecurity capabilities in the UAE. This coverage includes cyber services, secure solutions, government solutions, digital transformation, and digital and cyber education.

According to the company, “Digital14, established in 2019, is wholly owned subsidiary of ADQ and based in the regional and global innovation hub of Abu Dhabi. This base provides the ideal platform for Digital14 to accelerate digital advancement and cyber resilience solutions via robust, end-to-end solutions.”

Strong Experience in Providing Governmental Solutions

Digital14 has made strong inroads into the UAE marketplace, including in providing services to several government departments in Abu Dhabi. The company is an active thought leader and advisor within the UAE and Emirates. Through its broad cyber services,

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1 Digital14; “About Us”
it helps its clients in both government and commercial sectors assess, transform, and manage their cybersecurity posture. Additionally, Digital14 leverages its broad spectrum of cybersecurity capabilities to assist its clients with their cybersecurity policy compliance, strategy, breach preparedness, incident response, and security operations.

A great example is Digital14 providing cybersecurity services for a premier health information exchange located in Abu Dhabi. Malaffi has entrusted Digital14 with a host of cyber resilience services, including vulnerability management, application monitoring, and long-term security log retention.

Another example is their digitization services, with Digital14 providing the overall architecture and integration support for many governmental departments who aspire to deliver on Abu Dhabi’s transformational digitalization program.

**Competitive Differentiation**

In addition to its unique position as a provider of world-class cyber-security and digital transformation services, Digital14 offers an exceptional, secure communication platform called KATIM®, which is engineered to deliver secure defense-grade, enterprise-class, or industry-specific requirements to separate communications from the outside world. The KATIM platform delivers ultra-secure communication and collaboration through secure apps, devices, and infrastructure to enhance organizational productivity and efficiency.

Digital14’s subsidiary, DigitalTrust, is the only publicly trusted commercial Certification Authority (CA) headquartered in the GCC, with its location catering to the local market in the local language. What makes DigitalTrust’s services relevant for individuals and businesses is its set of trends, such as the dependency on mobile devices, where governments and companies are increasingly producing services available on mobile platforms, such as digital IDs and vehicle licenses. Another important trend is the increasing adoption of authentication and digital signing, which provide a faster and more secure, efficient, and reliable way to authenticate than physically signing paperwork. Moreover, Internet of Things (IoT) and Smart Cities are pushing for a new level of cybersecurity, which DigitalTrust currently covers through a combination of innovative cybersecurity solutions.

**Enabling and Empowering Digital-centric Talent**

With the increasing demand for cybersecurity in the digital era, finding the right skills and experience is still a challenge, resulting in unfilled positions and unqualified cybersecurity staff. A study conducted by ISACA in February 2020 shows that 62% of the surveyed organizations say their cybersecurity teams are understaffed, and 57% say they currently have unfilled cybersecurity positions. In addition, 70% of the surveyed companies said that fewer than half of their cybersecurity applicants are qualified.

Digital14 understood and addressed this skills gap by taking on the mission to nurture cybersecurity talent. For example, the company’s Ajyal Talent Management program (scholarships, summer camps, and courses) is focused on building and developing a generation of talent that is equipped with cybersecurity skills and a digital mindset.
In addition, to overcome the lack of technical and practical experience, Digital14’s Digital Academy and Cyber Academy provide exhaustive hands-on learning to enrich trainees with the required practical qualifications in the field. To enhance its Digital Academy and Cyber Academy, Digital14 partnered with Hack In The Box to provide even richer hands-on technical training.

**Conclusion**

Digital14 is transforming the cybersecurity industry in the UAE by helping enterprise and government clients realize the criticality of cybersecurity. Digital14 plays a unique role in supporting, advising, and innovating cybersecurity solutions critical to the UAE, GCC, and beyond across all dimensions of cybersecurity - policy, process, vulnerability assessments, adversarial threat analysis, threat intelligence, and security operations.

One of Digital14’s main missions is to close the skills gap in the cybersecurity domain by nurturing and growing the next generation of digital and cybersecurity-centric talent. The One Government model that Digital14 supports adds an additional level in a great customer experience for the UAE community.

With its strong overall performance, Digital14 has earned Frost & Sullivan’s 2020 Company of the Year Award in the UAE cybersecurity services industry.
Significance of Company of the Year
To receive the Company of the Year Award (i.e., to be recognized as a leader not only in your industry, but among non-industry peers) requires a company to demonstrate excellence in growth, innovation, and leadership. This excellence typically translates into superior performance in three key areas (demand generation, brand development, and competitive positioning) that serve as the foundation of a company’s future success and prepare it to deliver on the 2 factors that define the Company of the Year Award: Visionary Innovation and Performance, and Customer Impact).

Understanding Company of the Year
Driving demand, brand strength, and competitive differentiation all play critical roles in delivering unique value to customers. This three-fold focus, however, must ideally be complemented by an equally rigorous focus on Visionary Innovation and Performance to enhance Customer Impact.
Key Benchmarking Criteria

For the Company of the Year Award, Frost & Sullivan analysts independently evaluated each factor according to the criteria identified below.

**Visionary Innovation and Performance**
- Criterion 1: Addressing Unmet Needs
- Criterion 2: Visionary Scenarios through Mega Trends
- Criterion 3: Implementation of Best Practices
- Criterion 4: Blue Ocean Strategy
- Criterion 5: Financial Performance

**Customer Impact**
- Criterion 1: Price/Performance Value
- Criterion 2: Customer Purchase Experience
- Criterion 3: Customer Ownership Experience
- Criterion 4: Customer Service Experience
- Criterion 5: Brand Equity

**Best Practices Award Analysis for Digital14**

**Decision Support Scorecard**

To support its evaluation of best practices across multiple business performance categories, Frost & Sullivan employs a customized Decision Support Scorecard. This tool allows research and consulting teams to objectively analyze performance according to the key benchmarking criteria listed in the previous section, and to assign ratings on that basis. The tool follows a 10-point scale that allows for nuances in performance evaluation. Ratings guidelines are illustrated below.

RATINGS GUIDELINES

The Decision Support Scorecard considers Visionary Innovation and Performance and Customer Impact (i.e., the overarching categories for all 10 benchmarking criteria; the definitions for each criterion are provided beneath the scorecard). The research team confirms the veracity of this weighted scorecard through sensitivity analysis, which confirms 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.
The results of this analysis are shown below. To remain unbiased and to protect the interests of all organizations reviewed, Frost & Sullivan has chosen to refer to the other key participants as Competitor 1 and Competitor 2.

<p>| Measurement of 1–10 (1 = poor; 10 = excellent) |</p>
<table>
<thead>
<tr>
<th>Company of the Year</th>
<th>Visionary Innovation &amp; Performance</th>
<th>Customer Impact</th>
<th>Average Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital14</td>
<td>10</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Competitor 1</td>
<td>9</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Competitor 2</td>
<td>7</td>
<td>6</td>
<td>6.5</td>
</tr>
</tbody>
</table>

**Visionary Innovation & Performance**

**Criterion 1: Addressing Unmet Needs**
Requirement: Implementing a robust process to continuously unearth customers’ unmet or underserved needs, and creating the products or solutions to address them effectively.

**Criterion 2: Visionary Scenarios through Mega Trends**
Requirement: Incorporating long-range, macro-level scenarios into the innovation strategy, thereby enabling first-to-market growth opportunity solutions.

**Criterion 3: Implementation of Best Practices**
Requirement: Best-in-class strategy implementation characterized by processes, tools, or activities that generate a consistent and repeatable level of success.

**Criterion 4: Blue Ocean Strategy**
Requirement: Strategic focus on creating a leadership position in a potentially uncontested market space, manifested by stiff barriers to entry for competitors.

**Criterion 5: Financial Performance**
Requirement: Strong overall business performance in terms of revenue, revenue growth, operating margin, and other key financial metrics.

**Customer Impact**

**Criterion 1: Price/Performance Value**
Requirement: Products or services offer the best value for the price compared to similar offerings in the market.

**Criterion 2: Customer Purchase Experience**
Requirement: Customers feel they are buying the optimal solution that addresses both their unique needs and their unique constraints.

**Criterion 3: Customer Ownership Experience**
Requirement: Customers are proud to own the company’s product or service and have a positive experience throughout the life of the product or service.
**Criterion 4: Customer Service Experience**
Requirement: Customer service is accessible, fast, stress-free, and of high quality.

**Criterion 5: Brand Equity**
Requirement: Customers have a positive view of the brand and exhibit high brand loyalty.

**Decision Support Matrix**
Once all companies have been evaluated according to the Decision Support Scorecard, analysts then position the candidates on the matrix shown below, enabling them to visualize which companies are truly breakthrough and which ones are not yet operating at best-in-class levels.
Best Practices Recognition: 10 Steps to Researching, Identifying, and Recognizing Best Practices

Frost & Sullivan analysts follow a 10-step process to evaluate award candidates and assess their fit with select best practice criteria. The reputation and integrity of the awards are based on close adherence to this process.

<table>
<thead>
<tr>
<th>STEP</th>
<th>OBJECTIVE</th>
<th>KEY ACTIVITIES</th>
<th>OUTPUT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Monitor, target, and screen</td>
<td>Identify award recipient candidates from around the world</td>
<td>Pipeline of candidates that potentially meet all best practices criteria</td>
</tr>
</tbody>
</table>
|      |            | • Conduct in-depth industry research  
• Identify emerging industries  
• Scan multiple regions | |
| 2    | Perform 360-degree research | Perform comprehensive, 360-degree research on all candidates in the pipeline | Matrix positioning of all candidates’ performance relative to one another |
|      |            | • Interview thought leaders and industry practitioners  
• Assess candidates’ fit with best practices criteria  
• Rank all candidates | |
| 3    | Invite thought leadership in best practices | Perform in-depth examination of all candidates | Detailed profiles of all ranked candidates |
|      |            | • Confirm best practices criteria  
• Examine eligibility of all candidates  
• Identify any information gaps | |
| 4    | Initiate research director review | Conduct an unbiased evaluation of all candidate profiles | Final prioritization of all eligible candidates and companion best practices positioning paper |
|      |            | • Brainstorm ranking options  
• Invite multiple perspectives on candidates’ performance  
• Update candidate profiles | |
| 5    | Assemble panel of industry experts | Present findings to an expert panel of industry thought leaders | Refined list of prioritized award candidates |
|      |            | • Share findings  
• Strengthen cases for candidate eligibility  
• Prioritize candidates | |
| 6    | Conduct global industry review | Build consensus on Award candidates’ eligibility | Final list of eligible award candidates, representing success stories worldwide |
|      |            | • Hold global team meeting to review all candidates  
• Pressure-test fit with criteria  
• Confirm inclusion of all eligible candidates | |
| 7    | Perform quality check | Develop official award consideration materials | High-quality, accurate, and creative presentation of nominees’ successes |
|      |            | • Perform final performance benchmarking activities  
• Write nominations  
• Perform quality review | |
| 8    | Reconnect with panel of industry experts | Finalize the selection of the best practices award recipient | Decision on which company performs best against all best practices criteria |
|      |            | • Review analysis with panel  
• Build consensus  
• Select winner | |
| 9    | Communicate recognition | Inform award recipient of recognition | Announcement of award and plan for how recipient can use the award to enhance the brand |
|      |            | • Announce award to the CEO  
• Inspire the organization for continued success  
• Celebrate the recipient’s performance | |
| 10   | Take strategic action | Upon licensing, company able to share award news with stakeholders and customers | Widespread awareness of recipient’s award status among investors, media personnel, and employees |
|      |            | • Coordinate media outreach  
• Design a marketing plan  
• Assess award’s role in strategic planning | |
The Intersection between 360-Degree Research and Best Practices Awards

Research Methodology

Frost & Sullivan’s 360-degree research methodology represents the analytical rigor of the research process. It offers a 360-degree view of industry challenges, trends, and issues by integrating all 7 of Frost & Sullivan’s research methodologies. Too often companies make important growth decisions based on a narrow understanding of their environment, resulting in errors of both omission and commission. Successful growth strategies are founded on a thorough understanding of market, technical, economic, financial, customer, best practices, and demographic analyses. The integration of these research disciplines into the 360-degree research methodology provides an evaluation platform for benchmarking industry participants and for identifying those performing at best-in-class levels.

About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, helps clients 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 practices models to drive the generation, evaluation, and implementation of powerful growth strategies. Frost & Sullivan leverages nearly 60 years of experience in partnering with Global 1000 companies, emerging businesses, and the investment community from 45 offices on 6 continents. To join Frost & Sullivan's Growth Partnership, visit http://www.frost.com.