



2014 Global Distributed Denial of Service Mitigation
Customer Value Leadership Award



F R O S T & S U L L I V A N



50 Years of Growth, Innovation & Leadership

Background and Company Performance

Industry Challenges

Frost & Sullivan recognizes that DDoS attacks are gaining prominence as a preferred weapon for hackers, criminal organizations, nation-states, and other threat actors. A DDoS attack can disrupt, harass, and embarrass organizations of any size around the world. Threat actors can launch these attacks with minimal risk and often with less effort and expertise compared to more sophisticated network penetration and data theft exploits. Given these circumstances, DDoS attacks have increased in scale and frequency in 2013 and 2014.

Businesses face a daunting challenge in mitigating DDoS risk. Depending on the nature of an organization's online activity, the cost of a DDoS attack can cost up to millions of dollars per hour. As a result, customer requirements and expectations range greatly. In particular, the value of a DDoS solution can be difficult to measure accurately.

In order to stay competitive in this market, DDoS mitigation vendors must understand customer needs and develop quality and high value. However, this objective is challenging. A mitigation solution must address rapidly changing technologies, business considerations, and limited customer resources. Vendors that can address these challenges deliver a high level of value to customers and set their solutions apart from the competition.

Customer Value and Implementation Excellence

In order to determine the leading provider of customer value in the DDoS mitigation market, competitors have been assessed in the following areas:

Product/Service Value

The primary purpose of a DDoS attack is to inflict financial damages on a targeted organization whether by reducing customer access, employee productivity, or exhausting computing resources. A DDoS attack can cost targeted organizations millions of dollars in damages through lost business during the attack, brand deterioration, and recovery efforts. Therefore, businesses must be able to mitigate DDoS risk in a cost effective manner. A high value DDoS mitigation solution should be affordable and accessible to customers.

Businesses can deploy DDoS mitigation in the form of network appliances or as a service. DDoS mitigation appliances require expensive, high performance hardware and require a high level of expertise and continual maintenance to remain effective. As a result, appliance-based DDoS mitigation solutions represent large investments both initially and long-term.

Akamai offers the Kona Site Defender service as an integral part of its suite of Web security services. The company leverages its experience and vast infrastructure as a Content Delivery Network (CDN) to provide an effective DDoS mitigation service. Frost & Sullivan notes that as a service, Akamai customers are able to replace a large capital expense with a predictable monthly subscription.

Purchase Experience

There are a number of DDoS mitigation solutions available to businesses, each with distinct advantages. Typically, these solutions require a lengthy sales and deployment process including proof-of-concept testing and monitoring before implementing full protection.

Often, this process is not tenable for customers that are interested in DDoS mitigation. While some customers may investigate DDoS mitigation solutions proactively, many customers follow a more reactive strategy. Customers often wait until a DDoS attack is observed or the organization has been targeted by DDoS threat actors before reviewing their mitigation options.

Frost & Sullivan finds that the Kona Site Defender service offers a number of deployment choices and flexibility that meet customer needs. Akamai's cloud-based DDoS mitigation service is in-line with normal traffic and can be deployed quickly as it does not require hardware and software deployments. Furthermore, in 2014, Akamai acquired a pure-play provider of DDoS mitigation services named Prolexic. The addition of Prolexic services to the Akamai Web security portfolio provides customers with additional usage options.

Service Experience

DDoS mitigation solutions offer valuable protection of networks and Web sites that are in strong demand in the current threat landscape. A primary advantage of a DDoS mitigation service is that the service provider maintains the hardware infrastructure and software needed to detect and mitigate DDoS attacks. Customers that subscribe to the Akamai Cloud Security Solutions are assured that their Web sites are protected with effective and up-to-date protection technologies.

Frost & Sullivan's competitive analysis confirms that by comparison, most DDoS mitigation solutions are not as user-friendly and require careful tuning and regular updates. In many cases, businesses lack the time, resources, or skills to be able to implement a customer-operated DDoS mitigation solution.

Total Customer Experience

The Akamai Intelligent Platform runs Kona Site Defender as well as other Akamai Web security services. Customers can deploy full Akamai DDoS mitigation along with Web application firewall (WAF) protection for maximum and multi-layered protection for

business-critical Web applications. Customers can also provision Prolexic services to protect both web and IP-based applications. Often, customers mix the Prolexic and Kona services to meet their needs.

Frost & Sullivan's research shows that Akamai customers also benefit from the company's experience as a provider of CDN services in the form of increased performance. Managed Domain Name System (DNS) services from Akamai provide an additional optional layer of protection for businesses (i.e., reduce the risk of cache-poisoning and DNS-based DDoS attacks).

Vision Alignment

Akamai has developed a massive infrastructure and achieved the critical mass of Web presence necessary to deliver highly scalable and effective security solutions to its customers. The acquisition of Prolexic further demonstrates the company's long-term commitment to solving customer needs in terms of Web security and DDoS mitigation. The Prolexic acquisition expands Akamai's security offerings without over extending the company into unfamiliar territory.

For the most part, competing DDoS mitigation solutions follow a partner-centric approach to provide multi-layer protection portfolio. Appliance-based DDoS mitigation vendors are partnering with cloud-based service providers to offer flexible deployment choices. Partnerships present a useful short term strategy. However, technology partnerships have shortcomings in terms of product integration and ongoing support.

Technological Sophistication

Akamai's primary business is as a provider of CDN services. Akamai has spent years developing the massive Akamai Intelligent Platform that includes over 147,000 servers operating in 1,200 networks across 92 countries. The platform delivers up to two trillion transactions each day and provides Akamai with visibility into 15 to 30 percent of Web traffic on a daily basis. No competitor has a similarly large Web footprint to work with.

This massive Web presence provides Akamai with insight into global DDoS attack trends and also the means to stop attacks close to the points of origin. As a result, the Akamai Kona Site Defender service is highly effective with a 96.6 accuracy rate in threat detection.

Conclusion

Akamai offers a valuable solution for DDoS mitigation in the form of its Kona Site Defender service. Frost & Sullivan's independent analysis of the DDoS Mitigation market clearly shows that the Kona solution reduces restrictive requirements that customers face such as large capital expenses, lack of security expertise, and lack of resources. Whether

as part of a DDoS mitigation strategy or a broader Web security strategy, Akamai services provide a high level of value to its customers.

Based on the results of our research, Frost & Sullivan is proud to present the 2014 Global Customer Value Leadership Award in Distributed Denial of Service Mitigation to Akamai.

Customer Value Leadership

Ultimately, growth in any organization depends upon customers purchasing from your company, and then making the decision to return time and again. Everything is truly about the customer—and making those customers happy is the cornerstone of any long-term successful growth strategy. To achieve these dual goals (customer engagement and growth), an organization must be best-in-class in three key areas: (1) take into account what your competitors are, and are not, doing; (2) meet customer demand with a comprehensive, value-driven product or service portfolio; and (3) establish a brand that resonates deeply with customers and stands apart from other providers. To achieve best-practice levels in brand, demand, and positioning is a rare and significant accomplishment, and that is why Frost & Sullivan celebrates it with the Customer Value Leadership Award. Recipients of this award represent the top ten percent of their industry: the other ninety percent can't keep up.

Key Benchmarking Criteria

For the Customer Value Leadership Award, Frost & Sullivan evaluated the total client experience and strategy implementation excellence according to the criteria detailed below.

Customer Value Excellence

- Criterion 1: Total Customer Experience
- Criterion 2: Product/Service Value
- Criterion 3: Purchase Experience
- Criterion 4: Ownership Experience
- Criterion 5: Service Experience

Implementation Excellence

- Criterion 1: Vision Alignment
- Criterion 2: Process Design
- Criterion 3: Operational Efficiency
- Criterion 4: Technological Sophistication
- Criterion 5: Company Culture

The Intersection between 360-Degree Research and Best Practices Awards

Research Methodology

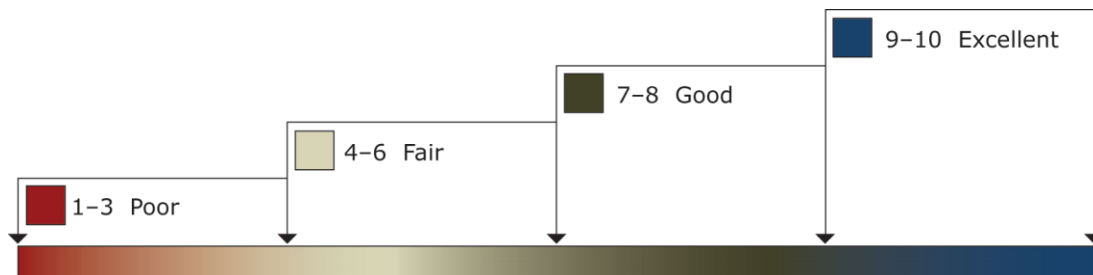
Frost & Sullivan’s 360-degree research methodology represents the analytical rigor of our research process. It offers a 360-degree-view of industry challenges, trends, and issues by integrating all 7 of Frost & Sullivan's research methodologies. Too often, companies make important growth decisions based on a narrow understanding of their environment, leading to 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 players and for identifying those performing at best-in-class levels.

360-DEGREE RESEARCH: SEEING ORDER IN THE CHAOS



Decision Support Scorecard

To support its evaluation of best practices across multiple business performance categories, Frost & Sullivan employs a customized Decision Support Scorecard. This analytical tool compares companies’ performance relative to each other. It 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. This tool allows our research and consulting teams to objectively analyze performance, according to each criterion, 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.



Best Practice Award Analysis for Akamai

Decision Support Scorecard: Customer Value Leadership

The Decision Support Scorecards, shown below, include all performance criteria listed and illustrates the relative importance of each criterion and the ratings for each company under evaluation for the Customer Value Leadership Award. 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.

Finally, to remain unbiased and to protect the interests of all organizations reviewed, we have chosen to refer to the other key players in as Company 2 and Company 3.

Decision Support Scorecard: Customer Value Excellence

<i>Measurement of 1-10 (1 = poor; 10 = excellent)</i>	Award Criteria					
	Total Customer Experience	Product/Service Value	Purchase Experience	Ownership Experience	Service Experience	Weighted Rating
Customer Value Excellence						
Relative Weight (%)	20%	20%	20%	20%	20%	100%
Akamai	10	9.0	10	9.0	10	9.6
Company 2	9.0	8.0	8.0	9.0	8.0	8.4
Company 3	8.0	7.0	8.0	8.0	8.0	7.8

Criterion 1: Total Customer Experience

Requirement: Customers receive exceptional impression at every stage of the purchase cycle

Criterion 2: Product/Service Value

Requirement: Products or services offer the best value for the price, compared to similar offerings in the market

Criterion 3: Purchase Experience

Requirement: It is as simple for salespeople to sell the product or service as it is for the customer to buy the product or service

Criterion 4: Ownership Experience

Requirement: Customers are proud to own and use the company’s product or service

Criterion 5: Service Experience

Requirement: Customer service is accessible, fast, and stress-free

Decision Support Scorecard: Implementation Excellence

<i>Measurement of 1-10 (1 = poor; 10 = excellent)</i>	Award Criteria					
Implementation Excellence	Vision Alignment	Process Design	Operational Efficiency	Technological Sophistication	Company Culture	Weighted Rating
Relative Weight (%)	20%	20%	20%	20%	20%	100%
Akamai	9.0	10	9.0	10	9.0	9.4
Company 2	9.0	9.0	8.0	9.0	8.0	8.6
Company 3	8.0	8.0	7.0	8.0	8.0	7.8

Criterion 1: Vision Alignment

Requirement: The executive team is aligned on the organization's mission and vision

Criterion 2: Process Design

Requirement: Processes support the efficient and consistent implementation of tactics designed to implement the strategy

Criterion 3: Operational Efficiency

Requirement: Staff performs assigned tactics seamlessly, quickly, and to a high quality standard

Criterion 4: Technological Sophistication

Requirements: Systems enable companywide transparency, communication, and efficiency

Criterion 5: Company Culture

Requirement: The executive team sets the standard for commitment to customers, quality, and staff, which translates directly into front-line performance excellence

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 more than 50 years of experience in partnering with Global 1000 companies, emerging businesses and the investment community from 40 offices on six continents. To join our Growth Partnership, please visit <http://www.frost.com>.