FROST & SULLIVAN

BlackBerry

2022
MARKET
LEADER

Global Mobile Threat Defense Industry

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Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. BlackBerry excels in many of the criteria in the Mobile Threat Defense space.

AWARD CRITERIA

Growth Strategy Excellence	Technology Leverage
Implementation Excellence	Price/Performance Value
Brand Strength	Customer Purchase Experience
Product Quality	Customer Ownership Experience
Product Differentiation	Customer Service Experience

Incorporating Mobile Threat Defense for Endpoint Security

The COVID-19 pandemic resulted in a notable increase in internet traffic, acceleration of the BYOD phenomenon, and a surge of connected IoT devices in 2020 and 2021 due to remote working trends. Attackers have responded to this trend with increased volume and sophistication of web-based threats. The resulting surge in connected devices has ultimately led to an increase in the number of endpoints associated to an organization, therefore increasing the chances of attacks and data breaches. With many organizations adopting BYOD policies, many employees are accessing business data from their personal mobile devices without applied network protection policies.

Cybercriminals are shifting their attacks accordingly, with mobile targeted attacks quickly rising in prevalence. Phishing scams specifically targeting mobile devices have also increased because of the pandemic – including many that played upon users' insecurities during challenging times. With many different types of devices now connecting to an organizations' network, there is no longer a single gateway that all traffic goes through where security and policy enforcements can be applied – therefore more emphasis must be placed on endpoint security.

As organizations become bystanders to their confidential data being breached via employees' compromised mobile devices, they are at great risk of suffering a ransomware attack, being fined for not taking appropriate security measures, or being unable to obtain cyber liability insurance.

Protection is needed to secure sensitive intellectual property and expand infrastructure features, as a result, incorporating Mobile Threat Defense (MTD) into organizations' security solutions becomes a necessity. Incorporating MTD into endpoint solutions is needed not only to secure the increasing number of endpoints, but also for tracking device behavior to detect and prevent malicious activity. Additional protection and security layers for remote connections, such as verification methods and endpoint visibility, are also critical components.

Organizations must deploy a MTD solution that combines simplicity, AI-powered protection, and complete user privacy. Employees need assurance that they can still conduct personal matters on their mobile device without being tracked, while MTD protection allows for organizations to know critical business data is being kept safe.

Brand Strength through Product Differentiation and Technology Leverage

BlackBerry has a long established position in the mobile market, with the acquisition of Cylance further building out its mobile threat defense (MTD) capabilities. BlackBerry's MTD offering combines the capabilities of AI and mobile endpoint management to prevent cyberattacks. The company has a unique narrative with leveraging MTD into traditional endpoint security, in contrast, most vendors take the opposite approach. Applying AI and endpoint solution strategies demonstrates keen attention to innovative strategies, with a goal of aiding organizations to operate in a Zero Trust and Zero Touch environment.

BlackBerry addresses MTD with a unified endpoint security (UES) approach incorporating many types of security threats and devices, in contrast to competitors addressing MTD by only targeting specific types of mobile attack vectors. This unified approach prepares organizations for adopting a Zero Trust security strategy.

Strategy Implementation Excellence

BlackBerry Protect Mobile extends Cylance AI-powered security to mobile devices to detect and prevent malware, phishing, and zero-day attacks. While monitoring for mobile threats at the device, network, and application layers to prevent malware infections, the technology also identifies security vulnerabilities and malicious activity through monitoring operating system updates, system parameters, and device configurations at the application level.

Protection also includes network defense against vulnerable Wi-Fi connections. Mobile threat activity is managed within the BlackBerry security console used for desktop and server endpoints, with the data automatically collected and correlated with telemetry from users, apps, and networks. This allows administrators to manage the security of every endpoint. The technology works well for organizations seeking protection for across both managed and BYO unmanaged device scenarios. This includes restricted use of unapproved Android and iOS apps from third-party app stores through sideload

detection. Users can easily monitor the status of all UES services and device health parameters within the BlackBerry Mobile app dashboard, thus promoting good cyber hygiene, that leads to increased production, and reduced security risks and costs.

Competitive products rely on traditional techniques such as continuously pushing updates, and/or relying on a cloud service. BlackBerry machine learning models are stable and do not require frequent updates. With new behaviors and threat attacks happening regularly, BlackBerry is consistently pushing forward with its enhanced roadmap for MTD technology.

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>
> *- Sarah Pavlak,*
> *Industry Principal*

Customer Focused Service

Through hosting an annual security summit, and customer advisory boards which meet on a regular basis, BlackBerry delivers a proud customer ownership experience. The security summit offers exploration of advanced technologies, as well as innovations and emerging trends with customers and partners to demonstrate impactful solutions.

With MTD attack prevention at the forefront, BlackBerry has ensured its robust MTD product is easy to use. This includes easy user enrollment, and an enhanced user experience through consolidation of all UES services onto one dashboard. BlackBerry is truly committed to educating its clients on how to defend their organizations from modern cybersecurity threats.

Growth Strategy Excellence

BlackBerry's R&D strategy seeks to provide broad market applications for its products, leveraging its superior cybersecurity technology base. BlackBerry's strategy is focused on IoT and Enterprise software and is pioneering the convergence of these two markets. BlackBerry has recorded market share gains in APAC, EMEA, and LATAM regions since 2018, pointing to a focused marketing strategy to drive growth.

Conclusion

Mobile device threats are a constantly evolving cyber security concern, especially given the increasing remote workforce. As a result, organizations require advanced and reliable mobile threat defense tools to enhance the efficiency and security of endpoints and deliver superior protection to ensure productivity and profits.

Through industry leading technology, a focused strategy combined with an evolving technology roadmap, aggressive marketing efforts, and a commitment to keeping customers focused on cyber hygiene through prevention first approaches, Frost & Sullivan commends BlackBerry as a leader in the mobile threat defense industry.

With its strong overall performance, BlackBerry earns Frost & Sullivan's 2022 Global Market Leadership Award in the mobile threat defense industry.

What You Need to Know about the Market Leadership Recognition

Frost & Sullivan's Market Leadership Award recognizes the company that achieved the greatest market share resulting from outstanding performance, products, and services.

Best Practices Award Analysis

For the Market Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Growth Strategy Excellence: Company demonstrates an ability to consistently identify, prioritize, and pursue emerging growth opportunities

Implementation Excellence: Company processes support efficient and consistent implementation of tactics designed to support the strategy

Brand Strength: Company is respected, recognized, and remembered

Product Quality: Products or services receive high marks for performance, functionality, and reliability at every stage of the life cycle

Product Differentiation: Products or services carve out a market niche based on price, quality, or uniqueness (or some combination of the three) that other companies cannot easily replicate

Technology Leverage: Company is committed to incorporating leading-edge technologies into product offerings to enhance product performance and value

Price/Performance Value: Products or services provide the best value for the price compared to similar market offerings

Customer Purchase Experience: Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

Customer Ownership Experience: Customers are proud to own the company's product or service, and have a positive experience throughout the life of the product or service

Customer Service Experience: Customer service is accessible, fast, stress-free, and of high quality

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About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at http://www.frost.com.

The Growth Pipeline Engine™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

Learn more.

Key Impacts:

- **Growth Pipeline:** *Continuous Flow of Growth Opportunities*
- **Growth Strategies:** *Proven Best Practices*
- **Innovation Culture:** *Optimized Customer Experience*
- **ROI & Margin:** *Implementation Excellence*
- **Transformational Growth:** *Industry Leadership*

The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- **Mega Trend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**