Market Share Leadership of the Year, Dynamic Publishing Solutions
Global, 2010

Frost & Sullivan’s Global Research Platform
Frost & Sullivan is entering 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 in turn 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 2010 Global Market Share Leadership of
the Year Award in Dynamic Publishing Solutions to Adobe.

Significance of the Market Share Leadership Award

Key Industry Challenges
The market for publishing is constantly evolving and organizations are realizing the
significance of maintaining and leveraging organizational assets. Dynamic publishing
solutions, the value chain of software products that enables the creation, repurposing,
publishation, and delivery of content across a variety of mediums, gains traction each year
as outmoded static, cut and paste publishing models are abandoned. Frost & Sullivan feels
that dynamic publishing solutions, utilized in enterprise, educational, and government
markets, play a powerful role in customer relationships, as creating customized collateral
is easier than ever before.

Dynamic publishing enables content creators to reduce expenditures associated with the
storage and repurposing of content, as well as produce organizational materials that are
more accurate, timely, and targeted for specific needs. Dynamic publishing plays an
integral role in the shift towards organizational enterprise content management,
integrating with software including marketing process optimization solutions, and digital
asset management.

Dynamic publishing solutions are only now emerging from the early market adoption
phase, and awareness of technologies continues to remain low. Fortunately, advocates of
dynamic publishing have provided a broad range of literature on the market, describing
usage scenarios, case studies, and success stories. This advocacy, paired with the
flexibility of these solutions, opens the doors for new deployments of dynamic publishing
solutions. The market is shaped by vendors who provide solutions as well as client usage
scenarios; however the largest vendors in the market play an integral role in articulating
the value of dynamic publishing solutions to potential customers.
Impact of Market Share Leadership Award on Key Stakeholders
The Market Share Leadership Award is a prestigious recognition of Adobe’s accomplishments in the Dynamic Publishing Solutions market. An unbiased, 3rd party recognition can provide a profound impact in enhancing the brand value and thereby accelerating Adobe’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**
  3rd 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 Adobe’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 Adobe.

**Chart 1: Best Practices Leverage for Growth Acceleration**
Best Practice Award Analysis for Adobe

The Frost & Sullivan Award for Market Share Leadership is presented to the company that has demonstrated excellence in capturing the highest market share within its industry. The Award recognizes the company's leadership position within the industry in terms of revenues or units, as specified.

Adobe’s Performance in the Dynamic Publishing Solutions Market

In 2009, Adobe was the leading vendor for page layout solutions, touting in excess of 30 percent of total market share. With Adobe’s fall 2008 release of CS4, the company has recognized growth of install bases throughout the last 18 months despite unfavorable market conditions. Frost & Sullivan’s research shows that Adobe’s recent spring 2010 release of CS5 has been well received with positive reviews, demonstrating the company’s dedication to innovation and integration. Features and functional enhancements, paired with integration to partner solution vendors as well as the Adobe product family, grant professionals the creative license and the reigns to create world class-content. Developing an astonishing portfolio of creative products, Adobe has expanded the arena of traditional publishing, enabling dynamic XML publishing workflows via Adobe InDesign.

Adobe’s feature-rich and functionally diverse InDesign provides creative professionals the stylistic capabilities needed to create high-impact content for use across print, web, and mobile environments. Conditional text allows different versions of content be viewed in a single source file. A single document can be created for different markets or users without requiring unique one-offs while track changes enables content creators to decrease cycle time of the editing process. Drag and drop functionality enables users to quickly insert graphics or videos and on-object controls making editing of rich assets a breeze. Additionally, InDesign’s revamped layers panel content enhances workflows, multi-page sizes yield greater flexibility, and rich assets can effortlessly tagged with metadata.

InDesign’s impressive integration with other products in the Creative Suite family provides synergistic benefits to the traditional page layout environment. Amongst these are exportation of Adobe Flash for interactive animations or page navigation, improved imaging via Illustrator and Photoshop, and advanced website design with Adobe Dreamweaver. InDesign can be purchased as a stand-alone solution or bundled with the CS5 Design Premium or Master Collection.

For larger scale deployments, Adobe’s InDesign Server is the most highly regarded enterprise-level server model for formerly individual desktop-installed software. Organizations that require integration with CMS and partner dynamic publishing vendors choose InDesign Server for scalability and flexibility. The InDesign Server provides unsurpassed build-out capabilities; allowing customers to create solutions, which best fit their unique needs. Adobe’s extensive partner network provides clients the ability to design solutions from the ground up or as pre-built solutions in conjunction with additional XML publishing components including XML authoring, translation, and publishing and rendering tools, as well as CMS. Large enterprises with multiple creative departments or dispersed workgroups in different regions or geographies can remain on the same page within their creative processes, gaining efficiency and optimizing output.
Key Performance Drivers for Adobe

**Factor 1: High Impact Collateral**
Online, print, or mobile content can be streamlined more easily than ever before via Adobe InDesign. InDesign's powerful workflow allows creative professionals to create high-impact content, manipulate existing collateral, and repurpose it for new use across channels. Users select InDesign for advanced production workflows, as Adobe provides cutting edge design features and can incorporate interactive content from Flash, videos, as well as other rich assets to create world-class imaging, documents, and presentations.

**Factor 2: Solution Integration**
InDesign can be easily integrated with a variety of XML translation, authoring, and publishing workflow tools. Adobe's extensive Solution Partner program includes numerous (ISVs), OEMs, System Integrators (SIs), and Value-added Resellers. These vendors include software partners, service partners, and integration partners. Adobe's competitive strategy is centered on flexibility, enabling end users to achieve the solutions and workflows that best fit their unique requirements.

**Factor 3: User Community and Support**
Continually developing new technologies, Adobe realizes that the user community is the most vital link in their avenue of success. Adobe Labs gives Adobe customers the opportunity to test-drive beta versions of technologies prior to their release. This mutually beneficial exchange ensures that Adobe resolves any potential issues in its solutions prior to their release and broadens awareness of customer needs. Furthermore, the Adobe Labs wiki offers the user community an additional layer of support and input. Customers can learn from valuable user contributions including code samples and best practices documents.

**Factor 4: Awards and Industry Recognition**
Frost & Sullivan notes that Adobe’s Creative Suite family has been extensively recognized throughout the digital media industry for their features, functionality, workflows, and corporate vision. Frost & Sullivan has honored Adobe with many awards, consistently monitoring and measuring Adobe’s performance against competitors. Additionally, the company has received favorable reviews from MacWorld, Shutterbug, Digital Media Net, Photo Reporter, and Renderosity.

Based on the aforementioned factors, Frost & Sullivan is proud to present the 2010 Global Market Share Leadership of the Year Award in Dynamic Publishing Solutions to Adobe.

**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 360-Degree perspective is also a “must-have” requirement for the identification and analysis of best-practice performance by industry leaders.
The 360-Degree 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 2 below, the following six-step process outlines how our researchers and consultants embed the 360-Degree perspective into their analyses and recommendations:

**Chart 2: How the CEO’s 360-Degree Perspective Model Directs Our Research**
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 7 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 the 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 3: 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 almost 50 years of experience in partnering with Global 1000 companies, emerging businesses and the investment community from 31 offices on six continents. To join our Growth Partnership, please visit http://www.frost.com.