*AT&T Recognized as the*

# 2021

## Company of the Year
United States
Public Safety Solutions Industry
*Excellence in Best Practices*

FROST *&* SULLIVAN

## AWARD CRITERIA

| Visionary Innovation & Performance | Customer Impact |
|---|---|
| Addressing Unmet Needs | Price/Performance Value |
| Visionary Scenarios Through Mega Trends | Customer Purchase Experience |
| Implementation of Best Practices | Customer Ownership Experience |
| Leadership Focus | Customer Service Experience |
| Financial Performance | Brand Equity |

## 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. Frost & Sullivan analysis indicates AT&T exemplifies visionary innovation, market-leading performance, and unmatched customer care in the public safety solutions space.

### Criterion 1: Visionary Scenarios through Mega Trends

With the persistence of COVID-19 and the rise of natural calamities (such as hurricanes, wildfires, flooding, and extreme weather), the necessity for reliable, secure nationwide public safety solutions has never been more pronounced. These conditions have elevated pressure on public safety entities to embrace advanced technologies that empower stronger, safer, and smarter communities.

*"For the fourth consecutive year, Frost & Sullivan commends AT&T for exemplifying visionary innovation, market-leading performance, and unmatched customer care in the public safety solutions space. AT&T's commitment to innovation has provided public safety agencies with the tools to deliver reliable, mission-ready solutions that transform the way first responders prepare, react, and respond to emergency events."*

*- Brent Iadarola, Vice President, Frost & Sullivan*

In this environment, AT&T's commitment to innovation has provided the public safety sector with the tools to deliver reliable, mission-ready solutions that transform the way first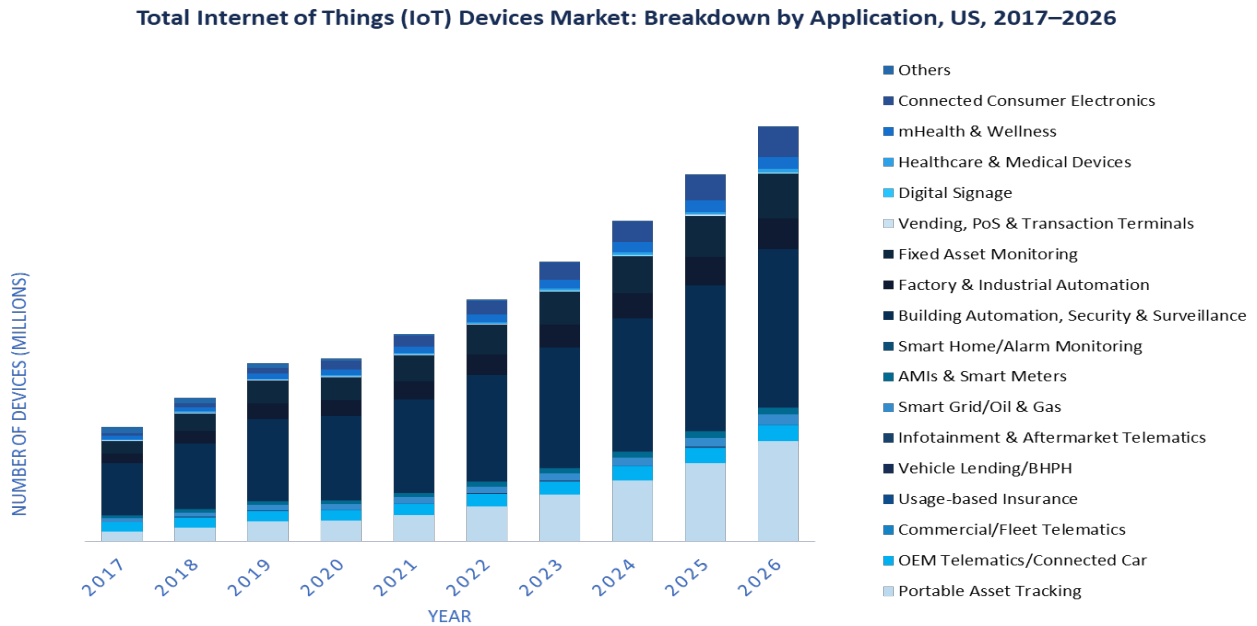 responders prepare, react, and respond to emergency events. AT&T's transformational approach to the next generation of public safety enhances situational awareness, expands incident intelligence, and has proven to dramatically improve outcomes during critical events.

The next generation of public will be characterized by a proliferation of connected assets accelerated by sensor- based IoT. In fact, Frost & Sullivan anticipates

that the rapid growth of distributed computing will increase the speed of IoT deployments, generating a staggering 12.7 billion connected devices in the United States by 2026.

**Exhibit 1.0 Total Internet of Things (IoT) Devices, US, 2017-2026**

**Total Internet of Things (IoT) Devices Market: Breakdown by Application, US, 2017–2026**



Note: All figures are rounded (millions). The base year is 2020. Source: Frost & Sullivan

AT&T continues to be at the forefront of providing industry-leading public safety solutions that modernize communications and transform emergency reporting and response. The adoption of FirstNet has never been stronger, now supporting over 2.8 million connections representing more than 18,500 agencies. AT&T reported the highest number of quarterly net-adds ever for FirstNet in Q3 2021, and Band 14 coverage expansion is now over 95 percent complete. Moreover, FirstNet connections are not simply associated with public-safety 'users', but also support a growing number of intelligently connected assets and IoT devices.

## Criterion 2: Addressing Unmet Market Needs in Public Safety

The introduction of Next Generation (NG9-1-1) infrastructure has created significant opportunities for connected assets that can seamlessly integrate with public safety infrastructure. This presents both challenges, as well as opportunities for the public safety sector. The volume of connected data, the variety of data types, and the velocity at which the data must be processed has the potential to overwhelm the capabilities of existing systems and will certainly require new, innovative solutions. While advanced technologies have enabled this reality, the challenge will now be how public safety entities efficiently access and ingest these new data sources. More importantly, how will they organize this information in a meaningful manner to allow for actionable emergency responses? The reality is the industry is only at the cusp of addressing these questions, and market participants, such as AT&T, that are able to provide solutions will be rewarded with substantial growth opportunities.

Frost & Sullivan commends AT&T's innovative strategy in public safety which incorporates long-range, macro level planning scenarios that anticipate global Mega Trends, thereby enabling first to market solutions that are groomed to capture new growth opportunities. AT&T's has demonstrated a unique ability to recognize and address unmet or under-served needs in the public safety sector by providing robust platforms and solutions that cater to the dynamic and evolving requirements of emergency providers. In particular, the convergence of FirstNet with AT&T's Emergency Services IP Network (ESInet) enables an ecosystem where citizens and/or connected assets can send IP-based communications to emergency call centers (ECCs) that can, in turn, efficiently consolidate and forward this information to the appropriate first responders, dramatically improving emergency response efforts.

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AT&T's market leading NG9-1-1 solution provides a nationally distributed, geographically diverse and redundant service architecture designed to enhance the customer service experience. AT&T has a nation-wide network of data centers co-located with existing 911 databases across the U.S., which provide pre-deployed call processing (with capacity to support twice the current volumes). As a pre-built, 6 core national solution, the architecture is unique from competitive offerings and allows ECCs to handle unexpected call volumes by automatically redistributing these calls to neighboring ECCs.

According to recent Frost & Sullivan research, security, cybersecurity, and hacking concerns were consistently cited as top issues for NG9-1-1 customers. In fact, raised standards for security, with stringent requirements, have been evident in many recent NG9-1-1 RFPs. To address these concerns, AT&T's ESInet solution consists of multi-layered network security, which allows users to minimize risks and disruption by seamlessly integrating encryption, firewalls, and intrusion detection and prevention controls.

### Criterion 3: Customer Impact/Best Practices Implementations/ Brand Equity

AT&T maintains a powerful reputation among customers and partners in the public safety sector. The company's brand equity is overwhelming evident from the traction it has seen not only with clients, but also in establishing a robust portfolio of best-of-bread partners. There have been a plethora of recent partnership, new initiatives and solutions, some of which are highlighted below:

- **FirstNet App Catalog/Device Portfolio:** Over 180 verified apps (iOS and Android) offered on the FirstNet catalog; approximately 315 FirstNet Ready® devices now available.
- **Locate for FirstNet:** Real time location determination capabilities available to FirstNet customers during critical events, including Z-Axis (also known as 3D or vertical location).
- **Mission-Critical Push-to-Talk (MCPTT):** FirstNet's interoperable platform now provides a variety of options for seamless connectivity between land mobile radio (LMR), Motorola Solution's MCPTT, and Enhanced Push-to-Talk (EPTT).

- **MegaRange™:** HPUE devices improve connectivity and throughput for first responders, especially at the edge of network coverage, by providing 6x the transmit power vs. standard LTE devices (1.25 Watts vs. 0.2 Watts), enabling communication with the cell tower from greater distances
- **NumberSync for Samsung Wearables:** Enables user to "twin" a smartphone with a wearable for communications exchanges and/or health diagnostics (without the smartphone present).
- **MissionKeeper® from KSI Data Sciences:** Provides emergency responders with enhanced situational awareness via streaming video and/or data from a variety of connected assets.
- **FirstNet Messaging:** A group notification and messaging service that integrates seamlessly and securely with a wide range of notification applications (including CAD) to enhance incident intelligence and communications during critical events.
- **NetMotion® by Absolute**: A mobile VPN solution that securely accelerates mobile traffic to the FirstNet network core, improving the user experience by ensuring reliable, ubiquitous connectivity.

Finally, the growth opportunity for FirstNet has broadened substantially given an expanding target market of prospective customers. In addition to traditional public safety entities such as emergency call centers (ECCs), state and local fire, police and EMS, FirstNet now actively targets federal users and "extended primary users", which are entities that can be considered complementary to first responders (such as workers in the healthcare, utility and government sectors).

## Conclusion

AT&T's long term strategy fosters a virtuous cycle of improvement and success across their public safety portfolio, consistently enhancing products, platforms, and solutions. With the strong momentum of FirstNet, AT&T's ESInet, and a variety of complementary public safety solutions, Frost & Sullivan believes AT&T is uniquely positioned to continue to lead the U.S. Public Safety sector in years to come. With its commitment to visionary innovation, un-matched customer care, and continued market leading performance in public safety, AT&T earns Frost & Sullivan's 2021 Company of the Year Award in the U.S. Public Safety Solutions Market.

## What You Need to Know about the Company of the Year Recognition

Frost & Sullivan's Company of the Year Award is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

### Best Practices Award Analysis

For the Company of the Year Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

### *Visionary Innovation & Performance*

**Addressing Unmet Needs**: Customers' unmet or under-served needs are unearthed and addressed by a robust solution development process

**Visionary Scenarios Through Mega Trends**: Long-range, macro-level scenarios are incorporated into the innovation strategy through the use of Mega Trends, thereby enabling first to market solutions and new growth opportunities

**Leadership Focus**: Company focuses on building a leadership position in core markets and on creating stiff barriers to entry for new competitors

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

**Financial Performance**: Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

### *Customer Impact*

**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 proudly 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 high quality

**Brand Equity**: Customers perceive the brand positively and exhibit high brand loyalty

# 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 on-going 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 six 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)