



AT&T Recognized for

2021

Market Leadership

United States

Next Generation 911 Industry

Excellence in Best Practices

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 for each nominated company. AT&T excels in many of the criteria in the NG911 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

Growth Strategy Excellence

The proliferation of COVID-19, natural calamities, and recent social unrest has elevated pressure on states and counties that have not yet initiated NG911 deployments to accelerate rollouts. NG911 represents an industry transformation that proactively enhances public safety by acknowledging and catering to the rapidly evolving demands, products, lifestyles, and technologies of citizens. In contrast to the legacy voice-

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

centric enhanced 911 (E911) network, NG911 supports a more diverse set of internet protocol (IP)-based communications that enhance the speed, accuracy, and preparation of first responders. NG911 introduces an array of innovative features and functionality that significantly expand public safety capabilities, enabling the transmission of text, data, video, IP-based voice calls, and other ‘connected’ assets to public safety answering points (PSAPs) and/or first responders in emergency situations.

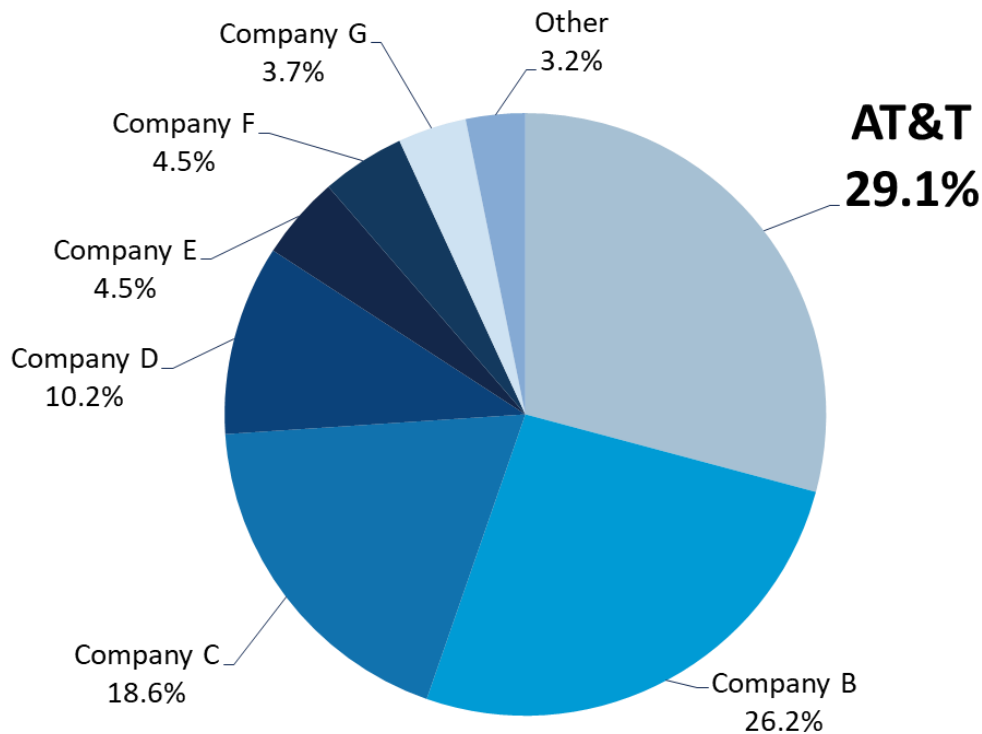
Frost & Sullivan research confirms AT&T is at the forefront of the public safety sector providing industry-leading solutions that modernize communications and

transform emergency reporting and response. By leveraging a legacy of proven experience and technical know-how in the public safety sector, AT&T holds the leading market position in NG911 for the third

consecutive year. More specifically, Frost & Sullivan’s research indicates that AT&T was the leading NG911 primary contract holder in the United States at YE 2020, with an estimated market share of 29.1%.

Frost & Sullivan market share metrics are based on the population covered by a primary NG911 contract holder. A closed NG911 contract constitutes a legal agreement between the purchasers of NG911 systems (generally, counties or states that control PSAPs) and the primary NG911 service provider. AT&T direct NG911 contracts covered a population of more than 60 million at year end 2020, leading all competitors in the U.S. market, according to Frost & Sullivan analysis.

Exhibit 1.0 NG911 Primary Contract Holders Market Share (YE 2020)



Product Quality

AT&T’s NG911 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 PSAPs to handle unexpected call volumes by automatically redistributing these calls to neighboring PSAPs.

According to recent Frost & Sullivan research, security, cybersecurity, and hacking concerns were consistently cited as top issues for NG911 customers. In fact, raised standards for security, with stringent requirements, have been evident in many recent NG911 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.

Customer Purchase/Ownership Experience

The purchasers of NG911 solutions are generally not risk takers. They are looking for vendor stability, proven deployments, and compliance with industry standards. AT&T's NG911 solution is backed by

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standard service level agreements (SLAs) for availability, call delivery, call quality, and provisioning. This approach provides customers with a consistent and reliable experience for predictable provisioning and implementation.

Frost & Sullivan believes the next 12 months will be a critical time period for state and local 911 administrators to identify and secure the appropriate partners for NG911 implementations. The typical time it takes to deploy NG911 once under contract can range anywhere from 6 months to 2 years. Deployments that occur on a PSAP-by-PSAP basis can be as quick as 6 months, while larger statewide

contracts can take up to 2 years. With 475+ PSAPs now handling live NG911 production, AT&T has been particularly successful in the deployment of existing contracts (i.e. assuring all processes associated with installation, configuration, testing are formally completed).

Successful deployments coupled with momentum in capturing new contracts, is a testament to the company's customer purchase experience. To date, AT&T has secured primary NG911 state-wide contracts in Connecticut, Indiana, Kansas, Maryland, North Carolina, Tennessee, Virginia, Wisconsin, and Illinois. Moreover, AT&T has direct contracts in the District of Columbia, Atlanta, and New Orleans, and in various counties in Florida and Texas. NG911 testimonials indicate AT&T customers are asserting a positive experience with the deployment process and feel they have selected a solution that addresses their unique NG911 needs and requirements.

Conclusion

Frost & Sullivan analysis indicates AT&T has maintained a market leadership position in NG911 by proactively successfully introducing smart solutions that cater to the evolving demands of both citizens and public safety entities. For its strong overall performance, AT&T is recognized with Frost & Sullivan's 2021 Market Leadership Award in the NG911 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

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)**

