

FROST & SULLIVAN

AT&T

**2022
COMPANY
OF THE
YEAR**

*UNITED STATES
PUBLIC SAFETY INDUSTRY*

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. AT&T excels in many of the criteria in the public safety space.

AWARD CRITERIA	
<i>Visionary Innovation & Performance</i>	<i>Customer Impact</i>
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

Visionary Innovation/Addressing Unmet Needs

The necessity for reliable, secure nationwide public safety solutions has never been more pronounced with the recent proliferation in crime, extreme weather events, active shooter incidents, and climate-related calamities across the United States. These conditions have elevated pressure on public safety entities to adopt solutions that cultivate stronger, safer, and smarter communities.

In this environment, AT&T has demonstrated a unique ability to recognize and address unmet or under-served needs in the public safety sector, providing robust platforms and solutions that cater to the

“With its commitment to visionary innovation, dedicated customer care, and market leading performance in public safety, AT&T earns Frost & Sullivan’s Company of the Year award in the U.S. Public Safety Market for an unprecedented fifth consecutive year.”

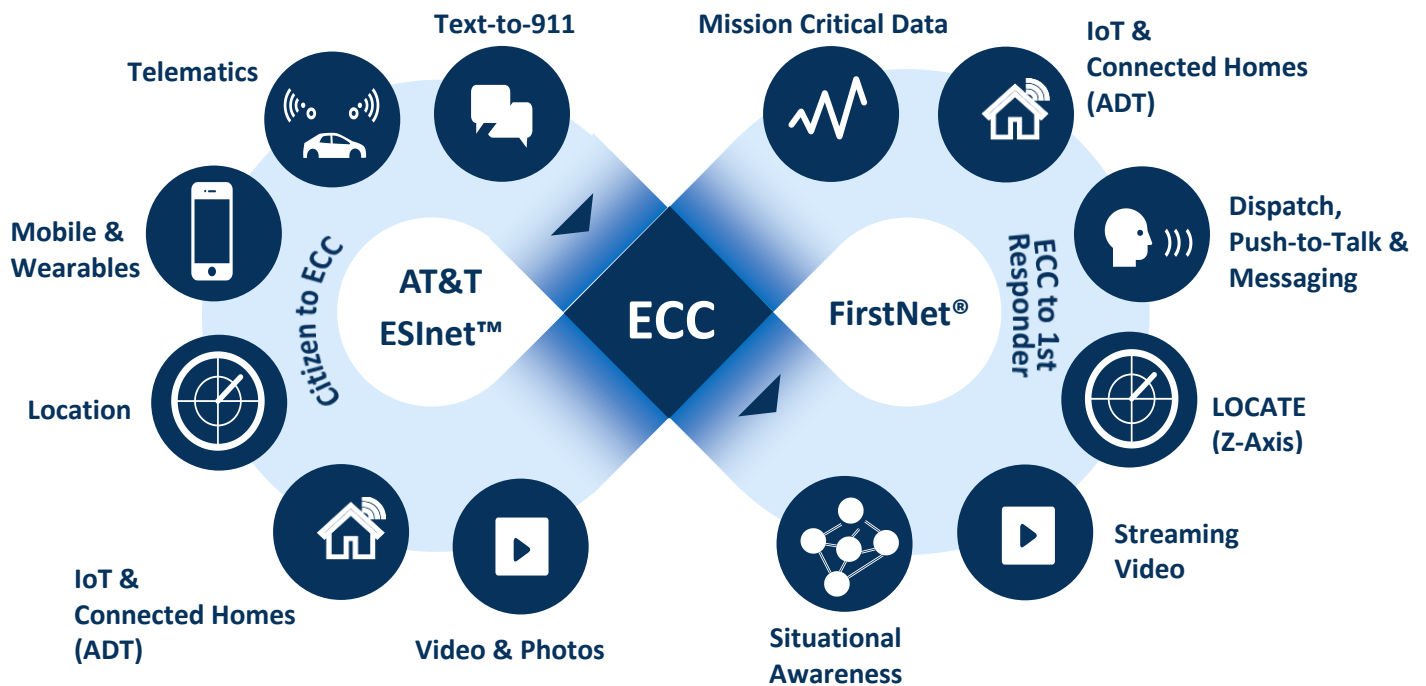
**- Brent Iadarola,
Vice President of Research
Frost & Sullivan**

dynamic and evolving requirements of both citizens and first responders. AT&T continues to be at the forefront of public safety providing industry-leading solutions that modernize communications and transform emergency reporting and response.

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. In particular, the convergence of FirstNet® with AT&T’s Emergency Services IP Network (AT&T 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.

Exhibit 1.0 AT&T at Center of the Next Generation of Public Safety



Source: Frost & Sullivan

Leadership Focus

FirstNet®

FirstNet® has been adopted by more first responders than any other network in the U.S., now supporting over 3.7 million connections and representing more than 21,800 public safety agencies. There are over 190 verified apps (iOS and Android) offered on the FirstNet catalog, and approximately 370 FirstNet Ready® devices. Importantly, FirstNet connections are not only accessible to public-safety ‘users’, but also

“AT&T’s commitment to innovation and best practices have 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.”

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support a growing number of intelligently connected assets, sensors, and IoT devices.

Frost & Sullivan anticipates a surge in IoT-initiated 9-1-1 notifications coming from connected security systems, vehicles, homes, buildings, smart city infrastructure, telematics, wearables, and other connected assets. Thus, ECCs must be equipped to keep up with the pace of disruptive technologies that are displacing legacy systems and altering the way consumers and businesses initiate 9-1-1 notifications.

ADT, a leading provider of smart home solutions, is the first home security provider to integrate with FirstNet. ECCs using AT&T ESInet™ can now receive verified text alerts when a home alarm is triggered. The partnership leverages the Emergency Data Broker™ to capture and forward ADT alarm notifications to 9-1-1 call centers. Frost & Sullivan deems this partnership particularly relevant given the proliferation of IoT-initiated 9-1-1 alerts triggered by smart homes and connected buildings.

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).

AT&T ESInet™

Frost & Sullivan research indicates that AT&T is the leading NG9-1-1 primary contract holder in the U.S., with an estimated market share of 32.3%. AT&T direct NG9-1-1 contracts now cover a population of more than 75 million, leading all competitors. The AT&T ESInet™ provides a nationally distributed, geographically diverse, and redundant service architecture that is uniquely designed to enhance the customer service experience. As a pre-built, 6 core national solution, the architecture is distinct from competitive offerings and allows ECCs to handle unexpected call volumes by automatically redistributing calls to neighboring ECCs.

Proven existing NG9-1-1 deployments, coupled with momentum in capturing new contracts, is a testament to AT&T’s customer purchase experience. Recent notable NG9-1-1 wins for AT&T include the states of Arkansas, Illinois, Tennessee, and the city of Dallas. In addition to these awards, AT&T has secured primary NG9-1-1 state-wide contracts in Connecticut, Indiana, Kansas, Maryland, North Carolina, Virginia, and Wisconsin. Moreover, AT&T has direct contracts in the District of Columbia, Atlanta, and New Orleans, and in various counties in Florida and Texas.

Best Practices Implementations/Customer Impact

In addition to FirstNet® and ESInet™, AT&T has introduced a range of targeted public safety solutions to support climate events, disaster response, in building situational awareness, and mission-critical messaging. There have been a plethora of recent partnerships, new initiatives, and innovative solutions in these areas, some of which are highlighted below:

Climate Events & Disaster Response

The acceleration of extreme weather and climate events across the U.S. has been alarming in recent years. AT&T has introduced a variety of solutions and portable assets that can quickly be deployed to support first responders’ ability to prepare, react, and respond to critical events such as wildfires, hurricanes, floods, and/or other major disasters.

- **FirstNet Fleet:** In addition to AT&T’s Network Disaster Recovery fleet that aids commercial network restoration, AT&T now has a fleet of highly portable resources known as Compact Rapid Deployables (CRDs) specifically dedicated to support first responders across the U.S.
- **FirstNet Emergency Response Kit** provides public safety agencies with FirstNet Ready® devices

and charging equipment to disperse to first responders during or following a major emergency event.

- **Weather Operations Center (AWOC):** AT&T has expanded their team of meteorologists to provide dedicated support and real-time risk analysis to the FirstNet Response Operations Group (ROG).

In Building Situational Awareness

The National Emergency Number Association (NENA) indicates that approximately 240 million calls are made to 911 each year. Frost & Sullivan estimates that over 85% of these calls now come from mobile devices. Moreover, *nearly 80% originate from indoor environments* including apartments, office buildings, hotels, retirements homes, college dorms, or other indoor venues. A clear strategic imperative for the public safety sector is the need for highly accurate, real time indoor location information. AT&T has introduced the following solutions to address this critical under-served need:

- **Locate for FirstNet** provides real time location determination capabilities to FirstNet customers during critical events. FirstNet Locate Pro and Locate Standard now have **Z-Axis** (also known as 3D or vertical location) which enables ‘vertical visualization’ capabilities to enhance situational awareness for first responders within buildings.
- **Cell Booster Pro** is an enterprise-grade mini cell tower that enables prioritized, in-building connectivity. Cell Booster Pro increases coverage by transmitting Band 14 spectrum and can mesh 3 devices within a building.

Messaging & Mission-Critical Push-to-Talk

The FirstNet platform enables seamless connectivity between a variety of distinct messaging solutions that enhance situational awareness and incidence intelligence for first responders during emergency events. Providers that can equip public safety personnel with reliable, secure messaging and enhanced Push-to-Talk (PTT) capabilities will be well positioned to succeed in the public safety arena.

- **Mission-Critical Push-to-Talk (MCPTT):** FirstNet’s interoperable platform provides a variety of options for secure connectivity between land mobile radio (LMR), Motorola Solution’s MCPTT, and Enhanced Push-to-Talk (EPTT).
- **FirstNet Push-to-Talk** now supports video streaming and PTT calling over Wi-Fi.
- **FirstNet Messaging** enables group notifications and messaging services that integrate with a wide range of notification applications (including CAD) to enhance communications during critical events.

Conclusion

AT&T's strategic approach to public safety fosters a cycle of improvement and success, consistently enhancing products, platforms, and solutions to keep pace with rapidly evolving consumer behaviors and next generation technologies. With market leading public safety platforms such as FirstNet® and AT&T ESInet™, coupled with a comprehensive portfolio of complementary solutions for first responders, Frost & Sullivan believes AT&T is uniquely positioned to continue to lead the U.S. Public Safety sector in years to come. For its commitment to visionary innovation, dedicated customer care, and market leading performance in public safety, AT&T is recognized with Frost & Sullivan's 2022 Company of the Year Award in the U.S. public safety Market for the fifth consecutive year.

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 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)**

