SkySafe

2025 ENABLING TECHNOLOGY LEADER

Leveraging Vital Technology to Enhance Products and Applications

RECOGNIZED FOR BEST PRACTICES IN THE NORTH AMERICAN DRONE DETECTION SOFTWARE INDUSTRY

FROST & SULLIVAN

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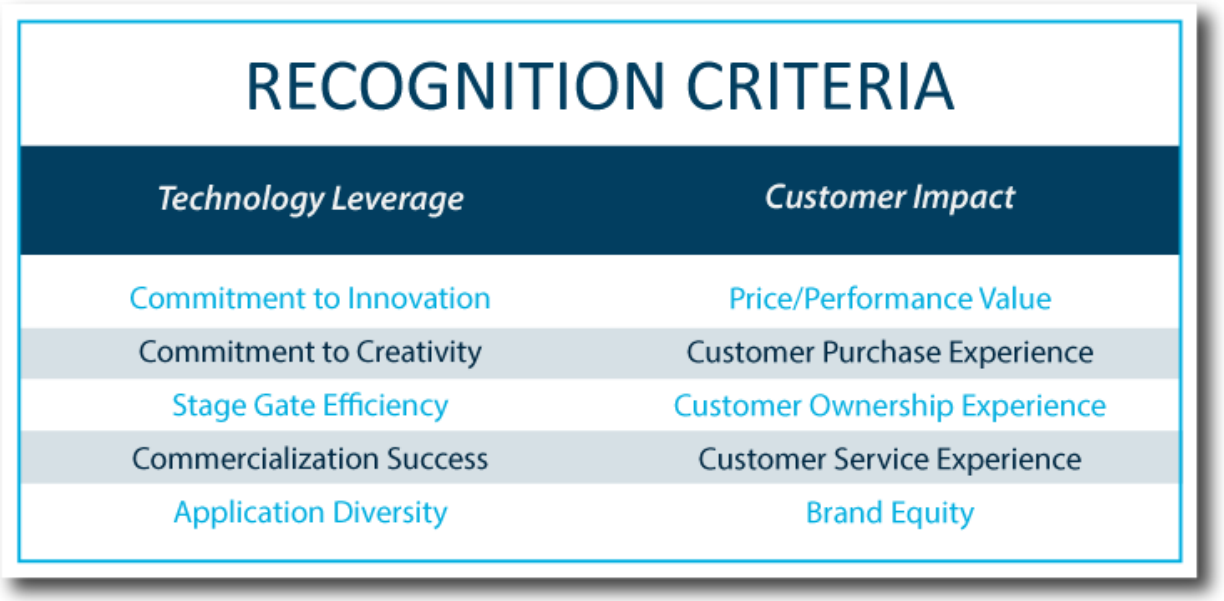
Best Practices Criteria for World-class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. SkySafe excels in many of the criteria in the Drone Detection Software space.



The Transformation of the Drone Detection Software Industry

The proliferation of unmanned systems and their use by state and non-state actors has created a new array of threats. Uncrewed aerial vehicles or drones have become increasingly accessible due to cost-effective price points and ease of assembly and deployment. This phenomenon has led to the frequent presence of unauthorized drones in various environments (e.g., borders, sporting events, and airports) and their potential use with malicious intent (e.g., unauthorized surveillance, organized crime, and weaponized attacks).

In the United States, suspicious drone sightings around critical sites, such as military bases and power plants, have increased exponentially since 2020. For instance, swarms of unidentified drones were spotted near the Air Force's Langley military base in Virginia in December 2023, raising suspicion in the US Department of Defense (DoD). Additionally, the Federal Aviation Administration halted flights in the Ronald Reagan Washington National Airport after a suspicious drone sighting in July 2022, causing the delay of 90 flights and the cancellation of 7.

Ensuring the timely detection of unauthorized drones is key to kickstarting the appropriate countermeasures. SkySafe, a San Diego-based start-up, has emerged as a leading drone detection industry provider of cloud-based software that locates drones, identifies their main attributes and protocols, and determines critical actionable data such as the system's operator, serial number, flight path, and speed.

Founded in 2015, the company encourages customers to enhance their airspace awareness through its comprehensive threat assessment capabilities and drone forensics, which can be used as the legal proof needed to identify, prosecute, and convict malicious drone operators.

SkySafe: Driving Innovation Across Industries

SkySafe's cloud-based solution enables remote and secure access to drone activity data. The platform creates dynamic reports based on real-time alerts, airspace data, and drone attributes, which are entirely customizable and tailored to each customer's needs. Furthermore, SkySafe prides itself in being a hardware-free company—it instead offers modular software that is easy to integrate with existing legacy technologies for a multi-layered approach.

> *"One of SkySafe's product differentiators is its versatility and diversity of application areas. The platform appeals to commercial and government/military customers, showcasing functionality and resourcefulness regardless of the customer. The technology's use cases include border security and the protection of critical infrastructure, stadiums, airports, and correctional facilities."*
>
> ***- Sol Ipuche***
> ***Research Analyst, Aerospace & Defense***

One of SkySafe's product differentiators is its versatility and diversity of application areas. The platform appeals to commercial and government/military customers, showcasing functionality and resourcefulness regardless of the customer. The technology's use cases include border security and the protection of critical infrastructure, stadiums, airports, and correctional facilities. SkySafe has publicly available industry-specific one-pagers and brochures that address the unique challenges and critical needs of the industries it serves.

Exemplifying its excellence, the University of Illinois Police Department leverages SkySafe's solutions to detect unauthorized drone intrusions during football games in the campus's stadium, which has a capacity of 85,000 people. Additionally, the company received a government contract of an undisclosed amount in mid-2024 to deploy its solution along a portion of the US southern border to help the Department of Homeland Security and Customs and Border Protection prevent cross-border smuggling of illicit goods.

Delivering Excellence at Competitive Price Points

SkySafe has achieved outstanding commercialization success in the past three years, evident in its numerous partnerships and government contract opportunities. A few examples include its collaboration with Fortem Technologies, an airspace awareness company that offers counter-UAS systems. The partnership was announced in October 2024, and both companies will integrate their solutions and expertise to create a multi-layered airspace security system to address evolving customer demand.

Other achievements that illustrate SkySafe's merit in the drone detection software industry are the University of Illinois's contract renewal until 2026 and, in December 2023, its sixth straight military contract win to provide its technology to a confidential US ally in Asia.

SkySafe's other publicly available customers and users include the US DoD (more specifically, the Department of the Navy and the Special Operations Command), the US FAA, the US Department of

Transportation, the PGA golfing tour, and the Rhode Island Emergency Management Agency. It is also a proud member of the Commercial Drone Alliance and Association for Uncrewed Vehicle Systems International (AUVSI).

> *"SkySafe boasts a wide array of dedicated resources focused on supporting customer needs, ranging from system setup to more detailed drone forensic analysis. Thanks to its in-house technology development, the company can rapidly integrate new features into its product according to customer requests."*
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Part of SkySafe's success stems from its subscription-based Software as a Service (SaaS) model. Through this, a third party (usually a company developing specialized software for protecting physical or virtual assets) provides the government or another organization with its security expertise and data processing capabilities. SaaS benefits include enhanced decision-making, system modularity, cost-effectiveness, and rapid scaling, thanks to the technology being acquired off-the-shelf instead of developed in-house.

SkySafe offers its platform and services through a subscription model with transparent pricing that includes optional training, configuration, and consultancy-related fees. This means that its proposal has zero hidden costs or maintenance fees, providing SkySafe with an advantage over competitors with hardware-based solutions that do not often include customization, IT, maintenance, training, and upgrades in their cost propositions. SkySafe's transparency and unmatched technology ensure the company's market success and customer satisfaction.

Elevating Customer Experiences Through A Strong Brand

SkySafe boasts a wide array of dedicated resources focused on supporting customer needs, ranging from system setup to more detailed drone forensic analysis. Thanks to its in-house technology development, the company can rapidly integrate new features into its product according to customer requests.

Customers can give feedback to the company through various mechanisms, such as support tickets and regular meetings with software engineers. The latter are reported to SkySafe's technical team and the Customer Advisory Board, who influence its product roadmap for future technology enhancements. This showcases the company's commitment to adapting its product to evolving market demands.

This customer-centric approach is a central component of SkySafe's brand identity, where it considers clients as its most powerful advocates. The company's case studies and tangible, publicly available success stories further strengthen its credibility and are favorable to the business's growth margins, accounting for its deep understanding of drone communication protocols and forensics.

Conclusion

In light of an increasingly complex unmanned systems landscape, airspace awareness has become a main priority across industries. As government agencies and other organizations sharpen their focus on harnessing drone data, SkySafe has emerged as a key market player that can help unlock powerful insights and act against drone threats. The company's comprehensive solution shows versatility in its application areas, as well as a commitment to pursue innovation with each system update. SkySafe differentiates itself from other hardware-based vendors thanks to a subscription-based model offering top-notch technology at a convenient price. Additionally, the company ensures consistent customer feedback loops with its product development team to update its platform in accordance with their needs.

With its strong overall performance, SkySafe earns Frost & Sullivan's 2025 North American Enabling Technology Leadership Recognition in the drone detection software industry.

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What You Need to Know about the Enabling Technology Leadership Recognition

Frost & Sullivan's Enabling Technology Leadership Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Recognition Analysis

For the Enabling Technology Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Technology Leverage

Commitment to Innovation: Continuous emerging technology adoption and creation enables new product development and enhances product performance

Commitment to Creativity: Company leverages technology advancements to push the limits of form and function in the pursuit of white space innovation

Stage Gate Efficiency: Technology adoption enhances the stage gate process for launching new products and solutions

Commercialization: Company displays a proven track record of taking new technologies to market with a high success rate

Application Diversity: Company develops and/or integrates technology that serves multiple applications and multiple environments

Customer Impact

Price/Performance Value: Products or services offer the best ROI and superior value compared to similar market offerings

Customer Purchase Experience: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

Customer Ownership Excellence: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

Customer Service Experience: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

		VALUE IMPACT	
STEP		WHAT	WHY
1	**Opportunity Universe**	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	**Transformational Model**	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	**Ecosystem**	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	**Growth Generator**	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	**Growth Opportunities**	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	**Frost Radar**	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	**Best Practices**	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	**Companies to Action**	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

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 Generator™

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:

- Megatrend (MT)
- Business Model (BM)
- Technology (TE)
- Industries (IN)
- Customer (CU)
- Geographies (GE)

