FROST & SULLIVAN

BEST PRACTICES

AWARDS

FROST & SULLIVAN

2020 BEST PRACTICES AWARD

AT&T

2020 UNITED STATES PUBLIC SAFETY COMPANY OF THE YEAR AWARD

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 sector.

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

Addressing Unmet Needs in Public Safety

The proliferation of COVID-19, coupled with a range of recent natural disasters including Hurricanes and wildfires, has significantly elevated pressure on public safety entities to expand and accelerate the deployment of 'smart' solutions that enhance the safety of citizens and communities. Public safety entities have been challenged to keep pace with disruptive technologies that can significantly alter the way consumers, businesses, and governments operate. The market has traditionally been characterized by rapidly changing technology, evolving industry standards, dynamic customer demands, and sluggish new product and service introductions. In today's environment, it is critical to improve the speed to market, performance, and reliability of public safety products, services, and solutions as the demands of citizens and public safety entities evolve.

Public safety solution providers face a variety of obstacles that impede the path to replace legacy systems with next generation, 'connected', cloud based platforms. The roadblocks range from poorly designed legacy architectures, to a lack of funding and other public-policy issues. Moreover, the highly regulated telecommunications industry, coupled with the inherent sensitive nature of public safety, has triggered an array of stringent regulations and security requirements that can temper the speed of deployments. Stakeholders must unite to address these challenges and identify creative funding models and eliminate the mix of incompatible platforms and standards that currently exist within the ecosystem. Finally, political, economic, social, and regulatory uncertainty globally exacerbates the risk environment—affecting decision-making and impacting overall stability in the public safety sector.

In this environment, AT&T continues to proactively identify and address industry challenges, offering an array of innovative solutions that significantly expand public safety capabilities, enhance incident intelligence, and drive growth opportunities for stakeholders throughout the ecosystem. Frost & Sullivan research indicates AT&T is currently the leading enabler of public safety solutions in the U.S., helping public safety entities advance emergency communication services which, ultimately, create safer, smarter and stronger communities.

Visionary Scenarios Through Mega Trends

Visionary innovation is the ability to innovate in light of opportunities that are likely to emerge from Mega Trends. Mega Trends are global, sustained, macro-economic forces of development that are transformational to business, economy, society, and culture. Thus, visionary innovation involves the ability to scout and detect unmet needs, and proactively address them with disruptive solutions that cater to evolving customer demands, products, lifestyles, and technologies. At the heart of visionary innovation is a deep understanding of the implications and ramifications of global Mega Trends, coupled with the ability to deliver solutions that can capture associated growth opportunities.

Visionary innovation in public safety is the catalyst for *smart* solutions that enhance efficiency and transform the way citizens and first responders report, react, and respond to emergency events. *Smart* solutions can fundamentally change the way incidents are reported by citizens (i.e. from simple voice calls to more sophisticated IP based exchanges), and redefine how public safety resources are deployed.

AT&T is at the forefront of providing industry-leading public safety solutions that modernize communications and transform emergency reporting and response. With FirstNet, the AT&T Emergency Services IP Network (AT&T ESInet), and a variety of other complementary public safety solutions, the company is well-positioned continue to lead the U.S. public safety sector in years to come. The convergence of FirstNet and ESInet solutions enable an ecosystem where citizens can send IP-based communications (i.e. text, photo, video, multimedia, etc.) to personal safety answering points (PSAPs) that can, in turn, efficiently consolidate and forward this information to the appropriate first responders, dramatically improving emergency response efforts.

> *"Visionary innovation involves the ability to scout and detect unmet needs, and proactively address them with disruptive solutions that cater to evolving customer demands, products, lifestyles, and technologies. Frost & Sullivan recognizes AT&T for driving visionary innovation in public safety by introducing 'smart' solutions that cater to the demands of both citizens and public safety entities."*
>
> *- Brent Iadarola, Vice President, ICT*

Leadership & Implementation of Best Practices

Advancing First Responder Capabilities with FirstNet During the Covid-19 Crisis

With the proliferation of Covid-19, the critical necessity of a dedicated, reliable nationwide public safety network has never been more pronounced. AT&T's FirstNet network is exclusively dedicated to the public safety sector and now used by over 14,000 public safety agencies nationwide, representing more than 1.7 million connections. The FirstNet network provides first responders and public safety institutions with unparalleled security and capabilities to enhance situational awareness, supporting the

exchange of critical data to emergency responders at rates approximately 25% faster than any current commercial network. Some noteworthy initiatives driven by AT&T in response to the Covid-19 crisis include:

- AT&T initiated a program that provides public safety agencies on FirstNet with lifetime access to the most up-to-date FirstNet Ready™ smartphones at no additional cost.
- The FirstNet Push-to-Talk (PTT) was launched as nationwide standards-based push-to-talk solution designed to enable public safety to enable their mobile devices to also have the added capabilities of a two-way radio.
- The FirstNet platform provides access to interactive COVID-19 dashboards created by the Center for Systems Science and Engineering at Johns Hopkins University. Public safety administrators with FirstNet can view confirmed cases, and associated trends, in their jurisdictions to optimize situational awareness and resource allocations.
- As COVID-19 has driven the need for first responders and emergency personnel to have expanded capabilities to identify situations where they may be at high risk of contagion from the virus, FirstNet's securely supports TeleHealth services that allow first responders and medical practitioners to remotely connect with patients.

Customer Ownership Experience & Brand Equity

By leveraging proven experience and technological know-how in developing innovative public safety solutions, AT&T continues to outpace competitors and maintain a powerful reputation among customers. AT&T's brand equity in the public safety space is overwhelming evident in the proven traction it has seen with customers that have embraced FirstNet. Some examples include:

- In December 2020, the Federal Bureau of Investigation (FBI) awarded AT&T a $92 million mobility contract for additional FirstNet capabilities to support the FBI's day-to-day and emergency operations.
- Department of Justice (DOJ) agencies using FirstNet include the Antitrust Division; Drug Enforcement Administration; Executive Office of U.S. Attorneys; Federal Bureau of Prisons; Justice Management Division; U.S. Attorneys; U.S. Marshals Service; and The Bureau of Alcohol, Tobacco, Firearms and Explosives, which was the was the first federal agency to fully adopt FirsttNet in 2018 with approximately 4,800 users.
- As 'first movers' of FirstNet, the City of San Antonio and Bexar County quickly recognized tangible benefits of the platform during the Covid-19 crisis. For example, FirstNet teams supported the HCA Methodist temporary hospital and mobile testing sites throughout the city during the crisis, providing reliable connectivity for first responders. Moreover, FirstNet was leveraged to ensure optimal network coverage for the Covid-19 quarantine center at Lackland Air Force Base at the request of the U.S. Department of Health and Human Services.
- The National Tribal Emergency Management Council leverages FirstNet for connectivity to coordinate medical supplies to support Tribal Nations impacted by the coronavirus pandemic across 32 states.

> *""In today's environment, it is critical to improve the speed to market, performance, and reliability of public safety products, services, and solutions as the demands of the market evolve. AT&T is at the forefront of providing industry-leading public safety solutions that modernize public safety communications and transform emergency reporting and response.".."*
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Impressively, AT&T's FirstNet solution provides public safety agencies with a 'hub' to centrally manage, control, and monitor FirstNet network activity, operations, and site conditions. As a result, customers can manage user accounts and devices while monitoring 24/7 network status. Currently, over 180 are 'FirstNet Ready™', which indicates they also support access to Band 14 (note: Band 14 spectrum has now been deployed in over 700 markets nationwide). Additionally, over 150 apps (iOS and Android) are now available in the FirstNet catalog. Frost & Sullivan expects this number to increase substantially as AT&T recently introduced new tools such as the FirstNet Single Sign-On Software Development Kit (SDK), allowing developers to integrate FirstNet Single Sign-On directly into their applications.

Conclusion

For the third consecutive year, Frost & Sullivan recognizes AT&T for driving visionary innovation in public safety by introducing 'smart' solutions that cater to the evolving demands of both citizens and public safety entities.

The necessity for reliable, secure nationwide public safety solutions has never been more pronounced with the proliferation of Covid-19 and the recent surge in natural disasters including Hurricanes and wildfires. In this environment, AT&T's versatility, coupled with in-depth knowledge of public safety trends, has enabled the company to proactively address emerging safety requirements with innovative solutions that cater to today's evolving technologies, products, and consumer behaviors. By introducing solutions that enhance connectivity, drive efficiency, and increase reliability, Frost & Sullivan believes AT&T is well-poised to increase its share of the public safety solutions market.

For its strong overall performance in the public safety sector, AT&T has earned Frost & Sullivan's 2020 Company of the Year Award in the United States Public Safety sector.

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)