



Date: September 01, 2026



John Marcus

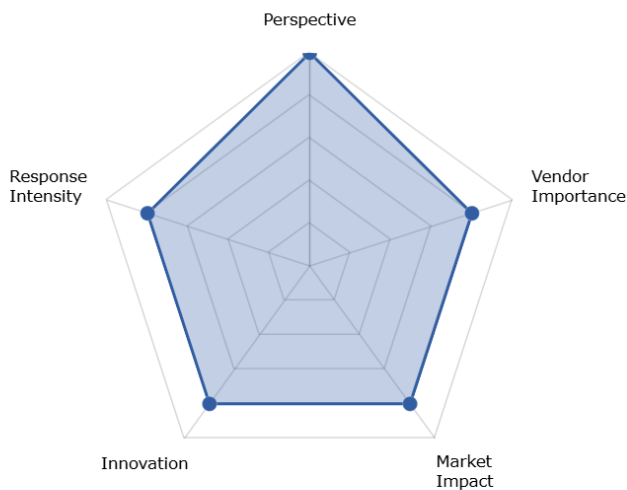
AT&T Launches Dedicated 5G SA Network for FirstNet

Report Summary

AT&T's launch of 5G SA dedicated to FirstNet shifts the concept of public safety telecom from "priority on the commercial network" to full architectural separation, putting pressure on rival security/resilience claims.

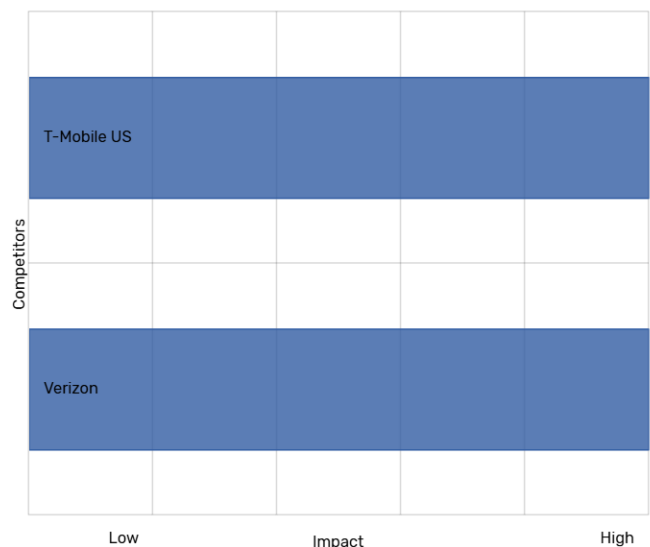
Quick Take

Event Rating



Copyright © 2026 GlobalData.
Generated:03 September 2026

Competitive Impact



Copyright © 2026 GlobalData.
Generated:03 September 2026

Event Summary

July 30, 2026 – AT&T announced a nationwide 5G standalone (SA) core for FirstNet dedicated to public safety, physically separate from its commercial core network. AT&T said the core improves responsiveness, uplink performance, resilience via geo-distributed sites, and security via FirstNet SIM access and a dedicated SOC. Migration has begun at no additional cost; 5G SA requires compatible devices/plans and isn't available everywhere.

Analytical Perspective

We are very positive on AT&T's launch of a dedicated 5G SA nationwide network core for public safety, representing a significant upgrade to its successful FirstNet 4G dedicated core and providing notable differentiation from rival approaches.

AT&T's move bypasses any market skepticism around network slicing traffic prioritization on the public network. With a physically separate nationwide 5G SA core and dedicated spectrum, AT&T will instead be introducing "Adaptive Mission Performance" as its new narrative designed for providing optimized network performance for different public safety applications and use cases. This will enable AT&T to provide specific slices to deliver required performance from a network that is already fully dedicated to public safety. AT&T is avoiding the term "slicing," however, and focusing on the "dedicated standalone network" narrative instead, which should be simpler for public safety decision makers to differentiate. The key message is that agencies do not share the operational core of the FirstNet network with consumers, so they avoid the risk of traffic contention at the point that matters most.

This framing will put pressure on competitors whose offers rely on shared core networks, 4G/5G NSA, best-effort segmentation, or "virtual" separation. Even if a rival can match AT&T on RAN coverage or claim parity on priority and preemption capabilities, AT&T can now base its competitive conversations around architecture, accountability, and security operations rather than signal coverage. That matters because agency procurement teams increasingly include CISOs, city/county IT, and risk officers who will respond to governance and isolation arguments more than speed claims. "Dedicated SIM, dedicated core, and dedicated SOC" is a selling point that should work across federal, state, local, and critical infrastructure segments of the public sector.

The AT&T launch also impacts adjacent vendors: body-worn camera providers, drone/robotics platforms, and MCX/PTT suppliers now face a credible carrier-led claim that the network can tune performance by application type. AT&T can use this to pull partners into a FirstNet-centric go-to-market—bundling connectivity, devices, and "mission performance" assurances. The resulting bundles would have an edge in the market against stand-alone connectivity resellers and solution providers that work by stitching multiple components together, which could be viewed as a risk rather than a benefit.

However, the announcement also puts added pressure on AT&T. It raises expectations from "better priority" to "mission-optimized behavior." If agencies do not see consistent uplink and responsiveness improvements in their specific environments—including rural areas, in-building dead zones, multi-device teams—the new message could backfire and sound like more marketing spin. While FirstNet is an all-band solution, using all of AT&T's 5G and 4G spectrum in addition to Band 14 (dedicated high-priority spectrum assigned specifically for public safety use), AT&T's planned migration of Band 14 from LTE to 5G has not yet taken place. This gives competitors an opening to question how universal the FirstNet 5G SA experience is today, and to scrutinize the network for any dependence on non-Band-14 spectrum, device compatibility, or uneven

geographic rollout. For those competing against or partnering with AT&T, the immediate tactical implication is messaging. Rivals will either have to counter with their own “hard separation” and governance story, or reframe the buying decision around resilience via multi-carrier diversity and operational independence from any single provider—an angle that will resonate with public safety agencies that treat the use of a single operator as an operational continuity risk. Vendors that sell applications and devices should prepare for public safety customers to demand network-aware performance guarantees and should align roadmaps to measurable uplink, latency, and availability outcomes rather than generic “5G-ready” claims.

Competitive Strengths

- AT&T can sell a uniquely “purpose-built” public safety architecture: a physically separate nationwide 5G SA core, dedicated spectrum and dedicated SIM access, and dedicated security operations. This is an easier, higher-confidence message for public safety agency leaders/CIOs than “a slice,” and it directly addresses market concerns around sharing commercial networks and competing for resources during major incidents.
- FirstNet gives AT&T a differentiated reliability and resilience story built around geo-diverse core network instances and hard operational separation from commercial traffic. In public-sector buying situations, that translates into a tangible risk reduction narrative (incident isolation, redundancy, continuity of operations) that procurement, IT security, and operational leadership can agree on.
- AT&T can credibly lead with uplink performance for modern public safety workflows, where agencies increasingly push video and situational awareness data. The dedicated 5G SA core enables improved responsiveness and materially better uplink throughput, translating into clearer outcomes for body-worn camera backhaul and live video sharing—benefits that map perfectly to daily use cases.
- When implemented, the company may package “Adaptive Mission Performance” as application-optimized connectivity without triggering the skepticism associated with network slicing claims. By positioning it as a roadmap to tailor performance for drones/robotics, body cams, IoT, and mission-critical communications, AT&T equips sales teams with a practical and industry-specific modernization narrative.
- AT&T’s breadth of public-safety-ready coverage enhancements strengthens competitive positioning in hard-to-serve environments. High Power User Equipment support (vehicle routers/modems) and in-building deployments (large building footprints) enable its salesforce to address common concerns around coverage for rural areas, basements, elevators, etc., while providing coverage to specific device types and real venues.
- FirstNet’s scale and institutional track record create a market advantage around trust that is hard for competitors to replicate: millions of connections, strong law-enforcement share, deep IoT penetration, and contractual accountability to federal government oversight and reporting. That combination supports mission-critical-grade credibility and reduces perceived vendor risk, and should help AT&T win long-term deals with agencies.

Competitive Concerns

- Despite the “dedicated core” messaging, many agencies may question how “standalone” the end-to-end experience really is until 5G moves to Band 14, and whether today’s 5G SA benefits depend on non-Band-14 spectrum or specific conditions in their footprint. Competitors can exploit any perceived gap between architectural claims and immediate user experience.
- The launch risks confusing buyers because it asks them to grasp multiple new concepts—5G SA core, steps to migrate, and the future “Adaptive Mission Performance,” capability to optimize applications—while explicitly avoiding the increasingly familiar term “slicing.” If AT&T’s sales teams cannot translate this into simple language and measurable outcomes, agencies may delay decisions or demand costly proofs of concept.
- “No additional cost” migration may be met with suspicion by buyers: agencies may assume there are hidden tradeoffs (e.g., device upgrades, plan changes, lengthy integration work, retraining) or worry about being pushed into future paid tiers when Adaptive Mission Performance (which is being rolled out over time) arrives. Competitors can position their offers as more transparent, especially for budget-constrained departments.
- Customers will be expecting to experience consistent gains (e.g., percentage uplink/downlink improvements) in their specific geographies, building types, and device fleets. But public safety users will be intolerant of operational variability; a few high-profile stories saying “it didn’t feel any faster” would quickly blunt the marketing advantage.
- Expanding its portfolio of mission-critical services (e.g., PTT/MCX via the newly launched FirstNet Fusion and third-party embedded services) intends to help customers avoid the risks around the ecosystem and overall execution. But if device certification, app interoperability, or governance across third party vendors lags in any way, agencies may see the platform as another fragmented solution.

Response & Recommendations

- **AT&T:** Provide proof point KPIs for its dedicated standalone 5G core, including app-level performance baselines (uplink, latency, and packet loss) by geography/device class. Supply customers with migration/transition guides, device certification lists, and procurement-ready language so agencies can buy based on operational outcomes—not concepts like slicing/prioritization promises.
- **Competitors:** Provide proof point KPIs for its dedicated standalone 5G core, including app-level performance baselines (uplink, latency, and packet loss) by geography/device class. Supply customers with migration/transition guides, device certification lists, and procurement-ready language so agencies can buy based on operational outcomes—not concepts like slicing/prioritization promises.

- **Buyers:** Look for apples-to-apples validation of claims by testing uplink-heavy workloads (e.g., live video, backhaul for body camera images, etc.) during congestion. Ask for guarantees on priority/preemption behavior, security monitoring, geo-redundancy, and migration costs. Consider continuity plans that balance the “dedicated” benefits of FirstNet with carrier diversity for critical operations.

Vendor, Solution, or Service Provider Goals

- AT&T wants to migrate FirstNet subscribers to the nationwide 5G SA dedicated core at no added cost, which requires users to adopt a compatible device and plan, and establish the new 5G SA core as the default operational foundation for public safety broadband.
- The company aims to use the dedicated core, SIM-only access, dedicated SOC and federal accountability to strengthen public-safety trust and retention by positioning FirstNet as more secure, resilient, and controllable than shared-core commercial 5G network alternatives, especially during high-congestion incidents.
- AT&T wants to lay the groundwork for what it calls “Adaptive Mission Performance” to tailor network behavior by application class (e.g., body cams, drones/robotics, IoT, mission-critical services/PTT), enabling future feature rollouts and stronger ecosystem bundling across devices, apps, and services.