FROST & SULLIVAN

2024
PRODUCT LEADER

IN THE NORTH AMERICAN PUBLIC SAFETY INDUSTRY

RapidSOS

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. RapidSOS excels in many of the criteria in the public safety space.

AWARD CRITERIA

Product Portfolio Attributes	Business Impact
Match to Needs	Financial Performance
Reliability and Quality	Customer Acquisition
Product/Service Value	Operational Efficiency
Positioning	Growth Potential
Design	Human Capital

The Next Generation of Public Safety: Market Dynamics

The acceleration of Next Generation 911 (NG911) deployments across North America has created significant opportunities for solution providers that can seamlessly integrate connected assets and enhanced location technologies with public safety infrastructure. 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. The proliferation of the Internet of Things, smart cities, connected vehicles, and wearables will trigger new growth opportunities for solution providers to source, manage, and monetize connected data to enhance incident intelligence and situational awareness for first responders.

Not only did the number of 9-1-1 incidents increase to record levels across the United States (US) in 2023, the volume of data per-incident grew substantially due to supplemental data sources now available to public safety entities.[1] In fact, Frost & Sullivan research indicates sensor-initiated 9-1-1 calls are accelerating aggressively and may surpass human-initiated emergency calls by year end 2028.[2] While advanced technologies such as NG911 have enabled this reality, the challenge is now how public safety entities will efficiently access and ingest these new data sources.

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[1] *Next Generation 911: The Future of Public Safety – Forecast to 2027.* (Frost & Sullivan June 2023)

[2] *Next Generation 911: The Future of Public Safety – Forecast to 2027.* (Frost & Sullivan June 2023)

More importantly, how will they organize this information in a meaningful manner to allow for actionable emergency responses? Ultimately, the objective of a 9-1-1 call is to get an emergency response on the scene as quickly as possible, yet the myriad of additional data sources that can be supported by NG911 is increasing exponentially. Challenging questions have emerged on how 9-1-1 call takers will handle and manage the overwhelming influx of new data sources.[3] Frost & Sullivan believes solution providers that proactively address these critical questions will be well-positioned to accelerate progress and capture growth opportunities in the next generation of public safety.

Redefining Public Safety

> *"A pioneer and transformational public safety leader, RapidSOS demonstrates its agility by continuously advancing and refining its game-changing emergency response platform, enabling first responders and 9-1-1 call takers to identify, react, and respond to emergencies more efficiently. The company recently introduced RapidSOS Unite, a flexible platform that intelligently unifies workflows and data for all means of communications relevant to an emergency event."*
>
> *- Brent Iadarola*
> *Vice President of Research*

Founded in 2013 and headquartered in New York City, New York, RapidSOS is a public safety solutions developer that focuses on providing real-time data intelligence for first responders during emergencies. The company offers a robust, cloud-based emergency response data platform that optimizes how 9-1-1 operators and first responders gather and leverage data in the wake of a crisis.

A pioneer and transformational public safety leader, RapidSOS demonstrates its innovation agility by continuously advancing and refining its game-changing emergency response platform, enabling first responders and 9-1-1 call takers to identify, react, and respond to emergencies more efficiently. The company recently introduced *RapidSOS Unite* (*Unite*), a solution that integrates *RapidSOS Portal* and *Premium* into a unified platform with a range of enhanced features and functionality and an expanded suite of modules. *Unite* centralizes NG911 workflows and data for all critical communication methods, displaying emergencies on a master map with a redundant connection to citizens' phones enabling bi-directional messaging and enhanced visibility during network outages. Moreover, the solution leverages artificial intelligence (AI) to unify and prioritize data from a variety of sources such as security cameras, medical profiles, telematics, building data, and/or wearables. The platform is enabled to responsibly integrate video feeds from over ten million security cameras, allowing caller camera feeds to be requested and managed with safety features like video blurring. Finally, premium users have access to advanced modules that can be customized to meet the specific needs and/or requirements of a given agency.

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[3] Ibid

Unite users can share incidents and data with over 21,000 public safety agencies and broadcast messages for mutual aid, enhanced by a partner network of over 20 companies providing capabilities such as drones, connected automatic external defibrillators, indoor and three-dimensional mapping, and enhanced multimedia streaming. Users control data feeds and capabilities by role and position and can leverage AI to monitor video feeds. RapidSOS' platform continues to grow with user feedback and new data requests, offering customizable modules tailored to user needs.

With the launch of *Unite*, the company offers five new modules to provide added support:

- **ArcGIS** solves the problem of having locally authoritative geographic information systems (GIS) data locked on another screen by integrating it directly into RapidSOS. With the GIS module, service agents can see critical data, such as house numbers, accurate road names, and mile markers on their agency's map, improving accuracy and control over data usage compared to commercial geocoders. Customers can also view aerial and side imagery supported by resilient, cloud-hosted GIS services.
- **Communicator** supports diverse and bilingual communities with AI-powered translation for over 175 languages in real time for inbound and outbound messages. This feature enhances existing messaging and video pathways and includes a configurable message library for quick replies. The module offers extensive storage for multimedia from conversations and plans to add transcription and keyword alerting.
- **I Am Responding** integrates with any computer-aided dispatch (CAD) system to deliver alerts and critical incident data, such as hazmat rail cars and safe handling guides. Responders can receive multimedia information from vehicle crashes through *Unite*, enhancing situational awareness with context from CAD and RapidSOS, including fire hydrant locations. This module is presently used by over 16,000 agencies.
- **Single Sign-on** allows telecommunicators to log in with a single click, enhancing security and reducing password management overhead. Just-in-time provisioning creates user accounts upon first login, eliminating manual invitations. Administrators can configure access to ensure the right users have the appropriate access to pathways and modules.
- **Intelligent Analyst** goes beyond call handling and reporting to inform operations and predict future emergencies. As funding is tied to call volume and service requests become digital, this module consolidates all call data, including texts and sensor alerts, for trend spotting and AI-powered forecasting. The module helps customers report key metrics, capture incidents that may not reach phones, and understand the types of emergencies in their community.

Digital Alerts Streamline Processing of Alarm Notifications

> *"As the public safety staffing crisis deepens, exacerbated by increasing responsibilities and a record volume of 9-1-1 calls in 2023, public safety agencies must do more with fewer resources. To address these strategic imperatives, RapidSOS developed its Digital Alerts service, which streamlines the processing of alarm calls that traditionally relied on analog phone calls. 9-1-1 call takers, on average, spend nearly 20% of their time on inefficient, tedious tasks related to false alarm notifications."*
>
> *- Samantha Fisher*
> *Best Practices Research Analyst*

Frost & Sullivan research indicates staffing shortages and inadequate training across all segments of the NG911 value chain have tempered industry progress and moderated the adoption of new technologies. As the public safety staffing crisis deepens, exacerbated by increasing responsibilities and a record volume of 9-1-1 calls and new connected data sources in 2023, public safety agencies must do more with fewer resources. To address these strategic imperatives, RapidSOS developed its *Digital Alerts* service, which streamlines the processing of alarm calls that traditionally relied on analog phone calls. 9-1-1 call takers, on average, spend nearly 20% of their time on inefficient, tedious tasks related to false alarm notifications.[4] *Digital Alerts* service provides incident-specific data in a standardized format directly into RapidSOS, eliminating the need for manual call processing and handling incidents from detection to response. For example, fire sensors detect incidents before human awareness, verify information at monitoring centers, and send detailed data, such as fire location and spread, to emergency communications centers and responder applications, reducing false alarms and improving response efficiency.

RapidSOS augments its solution with *Digital Alerts*, providing crucial information for various use cases such as hazardous materials and automobile accidents, including vehicle-based sensor data such as location, speed, number of occupants, restraint usage, and airbag deployments. This information is available immediately, allowing emergency call centers (ECC) to process incidents faster and with richer information, reducing manual effort. During extreme crises like active shooter situations, panic buttons relay critical information to ECCs and nearby agencies, enabling call takers to communicate digitally with school resource officers and track first responder movements. Access to connected cameras and indoor maps allow swift and accurate responses, saving lives. The CAD alert application programming interface facilitates direct data flow into CAD systems, with ongoing collaboration from security partners to field responders. Finally, these alerts help manage the increasing volume of smart devices and sensors, addressing the staffing challenge and saving substantial hours annually from alarm call processing.

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[4] "RapidSOS Innovation Day 20024." *RapidSOS*. Webinar. 21 May 2024. https://www.youtube.com/watch?v=_ZD0Ns7EDRw

Real-world Emergencies Driving Innovation

With its customer-inspired strategy, RapidSOS consistently brings best-in-class solutions to the market. *RapidSOS Harmony* (*Harmony*), an AI co-pilot for public safety, creates an alert system that ensures data is transmitted as soon as it becomes actionable. *Harmony* continues to ask relevant questions based on the alarm type, populating the information in real time. When complete, telecommunicators can access all necessary information, including location, alarm type, key holder information, permit numbers, alarm company and their contact details, and verification status and methods. Call takers can also listen to the audio of alarm calls if needed.

Harmony synthesizes AI with human ingenuity to optimize public safety outcomes. The solution allows busy public safety teams to streamline emergency data processes, transforming complex information into actionable insights within the department's current software systems and operational protocols. *Harmony* merges data and AI inputs from various partners into a unified, clear experience. *Harmony* excels in assisting public safety professionals with several key functions:

- **Alarm Call Processing:** Offload alarm call processing to *Harmony* to streamline the process of managing traditional ten-digit alarm calls.
- **Text Translation & Analysis:** Gain deeper insights from text-based conversations, including sentiment analysis and keyword alerting.
- **Video Object Detection:** Use AI to monitor video feeds and extract key, actionable insights.
- **Enhanced Emergency Insights:** Seamlessly process all connected data feeds, crafting a concise overview of each emergency.

Harmony learns and adapts based on real-time information, validating data against other RapidSOS sensor feeds and data sources. Over time, it uses sentiment analysis to detect underlying issues. For example, a car accident generates two separate 9-1-1 calls (i.e., one from the vehicle and one from the driver's wearable). Each device provides crucial information: the accident's severity, the driver's condition and health profile, and whether the car is an electric vehicle. *Harmony* deciphers these data points in real time, notifying the team that the vehicle is electric and overheating and that the driver has a severe medical history, prompting an escalated response from both fire and emergency medical services.

Harmony is already in use to support public railways, handling the simplest and often most redundant 9-1-1 calls, particularly those from monitoring stations. The solution manages text-based communications, such as responses to redundant calls, and integrates the diverse sensor feeds from RapidSOS into a cohesive incident overview. Behind *Harmony* lies a sophisticated language model, the first of its kind, trained to support 9-1-1 and first responders in their daily tasks. In short, the solution learns alongside the user.

RapidSOS will activate *Harmony* before year-end 2024, starting with alarm functionality. These are just the initial steps into the vast possibilities AI will provide, automating mundane and repetitive tasks so responders can focus on their core mission: responding to emergencies and saving lives.

While evolving from a product standpoint, RapidSOS never loses sight of its customers' perspectives. The company's brand maintains its robust public safety focus while meeting customer-specific needs. Given

today's landscape, Frost & Sullivan believes the company is in a prime position to increase its market share and capture growth opportunities in this highly competitive public safety industry.

Recipe for Success

RapidSOS demonstrates high growth potential. The company is well-positioned in the market with an industry-leading product that provides tremendous value in high-demand sectors. A critical element of its strategy includes building long-term partnerships with like-minded companies to deliver novel solutions to the public safety space.

FocusPoint[5]

> *"This collaboration underscores our commitment to delivering innovative solutions that prioritize the safety and well-being of people who live, work, and play on the fringe of cellular connectivity."*
>
> *- Chief Executive Officer of FocusPoint International*

In April 2024, RapidSOS partnered with FocusPoint International, a global emergency-response-as-a-service leader, to enhance safety for individuals on and off the grid. This collaboration connects travelers, lone workers, and others to emergency services through cellular and satellite networks, ensuring they receive help no matter where they are. By linking data from over 540 million devices to 9-1-1 and field responder agencies, RapidSOS enables FocusPoint to leverage the support of over one million emergency responders. During incidents, ECCs receive alerts from FocusPoint with the individual's location, situation details, and contact information. Additionally, FocusPoint's Overwatch X Rescue service augments RapidSOS monitoring, coordinating emergency assistance outside 9-1-1 jurisdictions and cellular networks and ensuring comprehensive support regardless of location.

Eagle Eye Networks[6]

RapidSOS announced its partnership with Eagle Eye Networks in April 2024 while simultaneously introducing Eagle Eye 9-1-1 Camera Sharing, which enables 9-1-1 call takers to access real-time video from emergencies nationwide. This collaboration allows camera owners to opt in and share pre-selected live feeds directly with 9-1-1 during emergencies. RapidSOS, used by over 16,000 911 agencies covering 99% of the US population, integrates with Eagle Eye Networks, the largest enterprise cloud camera platform with nearly ten million cameras. Schools or businesses predetermine shareable cameras, and a 9-1-1 call triggers an alert enabling telecommunicators to view footage from these cameras, including nearby ones, enhancing situational awareness and informing first responders. Early adopters include schools, universities, retail outlets, lone-worker facilities, and unstaffed businesses like 24-hour gyms. This technology boosts the value of security cameras and enhances emergency preparedness.

[5] "FocusPoint International and RapidSOS Form Strategic Partnership." *RapidSOS*. Press release. 23 April 2024. Web. https://rapidsos.com/focuspoint-international-and-rapidsos-form-strategic-partnership/ Accessed 29 May 2024

[6] "Connecting Security Cameras Directly to 911 and Field Responders." *RapidSOS*. Press release. Web. https://rapidsos.com/rapidsos-eagle-eye-networks-camera-sharing-across-us/ Accessed 29 May 2024.

> *"In a crisis when seconds count, a security camera can provide vital visual information […] giving first responders the situational awareness they need to assess and thoughtfully approach a dangerous situation."*
>
> **- Chief Executive Officer at Eagle Eye Networks**

Through customer feedback and market research, RapidSOS consistently upgrades and improves its platform. The company offers the *RapidSOS Pioneer Program*, a groundbreaking initiative for forward-thinking ECC and field responder partners. Participants gain early access to every new RapidSOS feature, allowing them to engage directly with the company's product and marketing teams to provide feedback that shape the platform's future. This program also offers an opportunity to connect with other safety pioneers, share stories, and receive materials to showcase participation in their communities, demonstrating continued investment in the latest public safety technology.

Moreover, in March 2024, the company announced an additional $75 million in a funding round managed by BlackRock, closing RapidSOS' latest funding round at $150 million.[7] This funding round also included participation from NightDragon, Insight Partners, BAM Elevate, Manhattan Venture Partners, Acrew Capital, and Harmonic Growth Partners. NG911 solution providers, such as RapidSOS, are encouraged to explore in-house product development and strategic partnerships with companies that share their vision for public safety. Over the last ten years, this approach has resulted in thousands of public safety agencies influencing RapidSOS' technology development. With over $250 million invested in research and development, these initial insights now support over 21,000 9-1-1 and first responder agencies in six countries, handling 3.3 billion data payloads.[8]

Frost & Sullivan finds RapidSOS' impressive growth momentum and trajectory are testaments to its product leadership, earning its clients' trust and loyalty and enabling it to capture market share.

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[7] "RapidSOS Closes $150M Financing Round led by Funds and Accounts Managed by BlackRock to Advance Intelligent Safety." Press release. 5 March 2024. Web. https://www.prnewswire.com/news-releases/rapidsos-closes-150m-financing-round-led-by-funds-and-accounts-managed-by-blackrock-to-advance-intelligent-safety-302079878.html Accessed 29 May 2024

[8] "2023 in Review: Reflections on transforming safety in 2023." *RapidSOS*. Press release. Web. https://rapidsos.com/2023-year-in-review/ Accessed 29 May 2024

Conclusion

As a product leader, companies must proactively identify and address unmet market needs with innovative solutions that cater to evolving customer demands and technologies. Legacy 9-1-1 technologies and systems have not kept pace with innovation and evolving user behaviors in the public safety sector, adversely impacting the efficiency of first responders. In this environment, pioneer and transformational leader, RapidSOS developed *RapidSOS Unite* (*Unite*) and *RapidSOS Harmony* (*Harmony*), leveraging artificial intelligence (AI) to intelligently optimize how 9-1-1 call takers and first responders identify, react, and respond to emergency events. *Unite* offers a flexible solution with an expanded suite of premium modules, building on existing features with added functionalities, intelligently centralizing workflows and data for all critical communication methods.

Complementary to *Unite*, *Harmony* is an AI co-pilot for public safety that creates an alert system that ensures meaningful data is transmitted as soon as it becomes actionable; and differentiating itself from competitive solutions through its key functions, including alarm call processing, text translation and analysis, video object detection, and enhanced emergency insights.

Through its ongoing innovation and product leadership, RapidSOS is well-positioned for significant growth. With its strong overall performance, RapidSOS earns Frost & Sullivan's 2024 Product Leadership Award in the North American public safety industry.

What You Need to Know about the Product Leadership Recognition

Frost & Sullivan's Product Leadership Award recognizes the company that offers a product or solution with attributes that deliver the best quality, reliability, and performance in the industry.

Best Practices Award Analysis

For the Product Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Product Portfolio Attributes

Match to Needs: Customer needs directly influence and inspire the product portfolio's design and positioning

Reliability and Quality: Products consistently meet or exceed customer expectations for performance and length of service

Product/Service Value: Products or services offer the best value for the price compared to similar market offerings

Positioning: Products serve a unique, unmet need that competitors cannot easily replicate

Design: Products feature innovative designs, enhancing both visual appeal and ease of use

Business Impact

Financial Performance: Strong overall financial performance is achieved in terms of revenues, revenue growth, operating margin, and other key financial metrics

Customer Acquisition: Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

Operational Efficiency: Company staff performs assigned tasks productively, quickly, and to a high-quality standard

Growth Potential: Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

Human Capital: Commitment to quality and to customers characterize the company culture, which in turn enhances employee morale and retention

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

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