

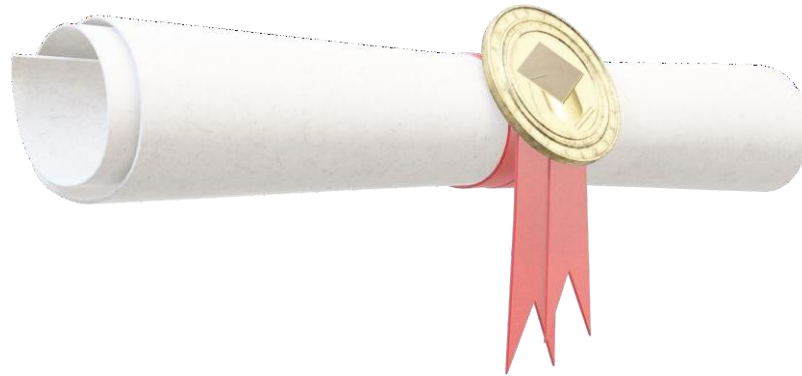


Market Intelligence

Networking Opportunities and Trends in State and Local

Market Insights Team

The insights in this analysis highlight network modernization priorities and secure connectivity requirements across the S&L and EDU sectors.



Identified are relevant opportunities around wired and wireless infrastructure, secure access, and network automation—along with strategies for supporting agency-wide initiatives focused on operational efficiency, user mobility, and resilient performance in both office and mission-critical environments.

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High Level Trends in S&L

S&L Trends 1/2

Urbanization and Smart City Integration

- With the shift towards suburbs and city outskirts, SLGs require enhanced connectivity and smart technologies to meet the distributed needs of constituents, creating opportunities for Networking solution providers to provide robust and scalable networking solutions.

Digital Transformation in Response to 'Donut Effect'

- As state and local governments enhance service delivery through smart infrastructure and improved connectivity to adapt to urban shifts and the “donut effect” (hollowing out of downtown districts), Networking solution providers can provide the necessary network infrastructure to support these digital and smart technology enhancements.

Infrastructure Modernization

- The push to modernize aging infrastructure and integrate digital transformation initiatives presents a significant opportunity for Networking solution providers to offer advanced network infrastructure solutions that improve efficiency, optimization, and service delivery.

5G and IoT Implementation

- The rollout of 5G and IoT technologies is facilitating the development of smart cities, offering opportunities for Networking solution providers to supply the necessary high-performance networking solutions that support real-time data sharing, operational efficiency, and enhanced citizen engagement.

Workforce Transformation

- As SLGs adopt digital tools and data analytics, there is a growing need for technologically advanced and versatile workforce solutions, enabling Networking solution providers to provide secure and efficient networking solutions that enhance operational efficiency and job satisfaction.

S&L Trends 2/2

Modernized Citizen Facing Services

- State and local governments are investing in modernizing public health, utilities, and public transport systems with technologies like telehealth platforms, smart grid solutions, and connected traffic management, creating opportunities for Networking solution providers to provide robust networking solutions that enhance connectivity and operational efficiency.

Tech-Enabled Tooling

- The adoption of AI diagnostics, XR training technology, and administrative automation tools in public health, first responders, and public administration sectors highlights opportunities for Networking solution providers to offer secure and scalable network solutions that support these advanced technological applications.

Communication and Response

- The need for effective communication and engagement tools for public administration and first responders drives demand for Networking solution providers' high-performance networking solutions to ensure seamless information dissemination and coordination during emergencies and daily operations.

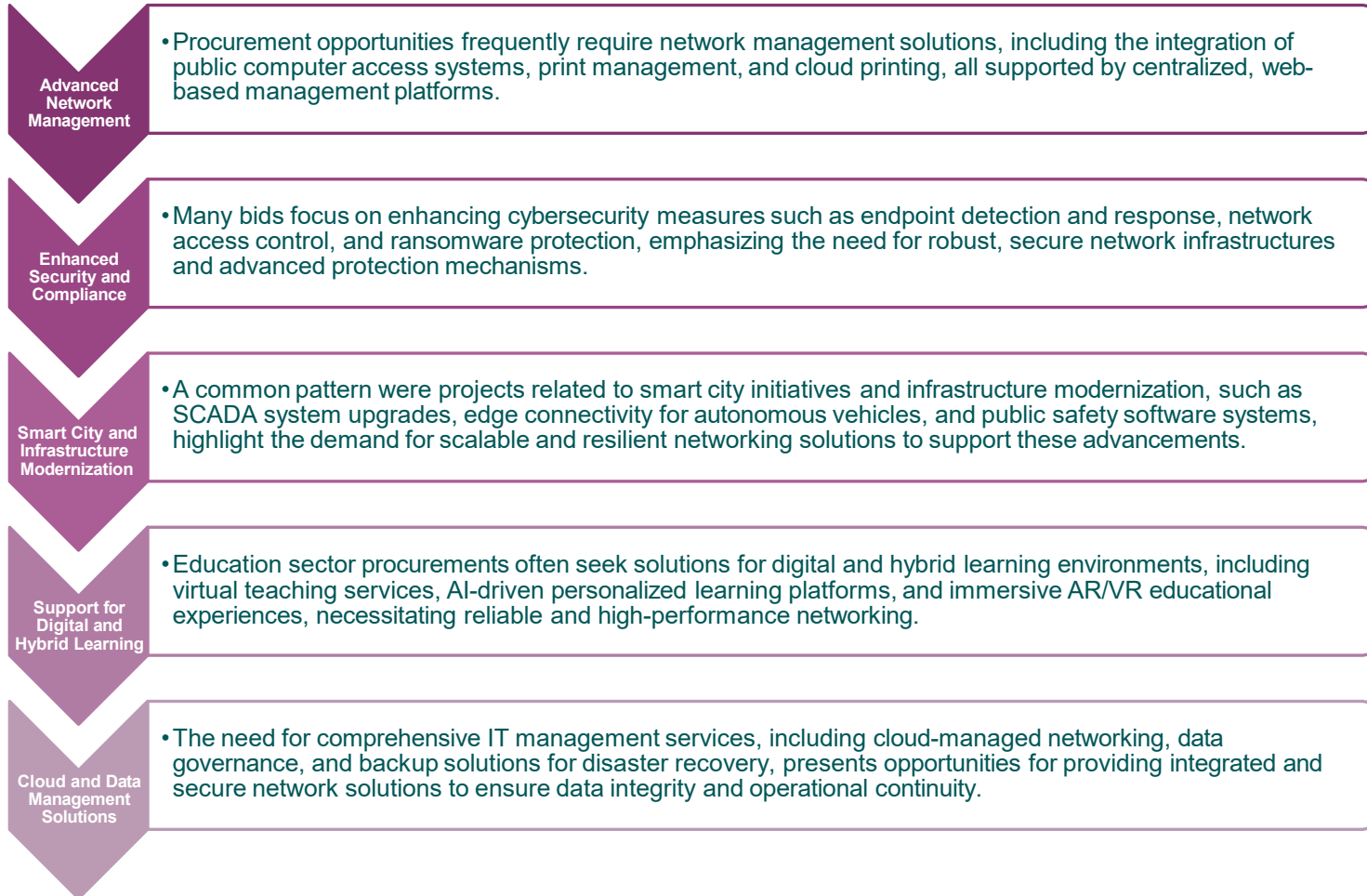
Sustainability and Infrastructure Modernization

- The push for sustainability and modernization, backed by investments from the Infrastructure Investment and Jobs Act, presents opportunities for Networking solution providers to supply advanced network solutions that enable smart city initiatives, high-speed connectivity, and efficient public services.

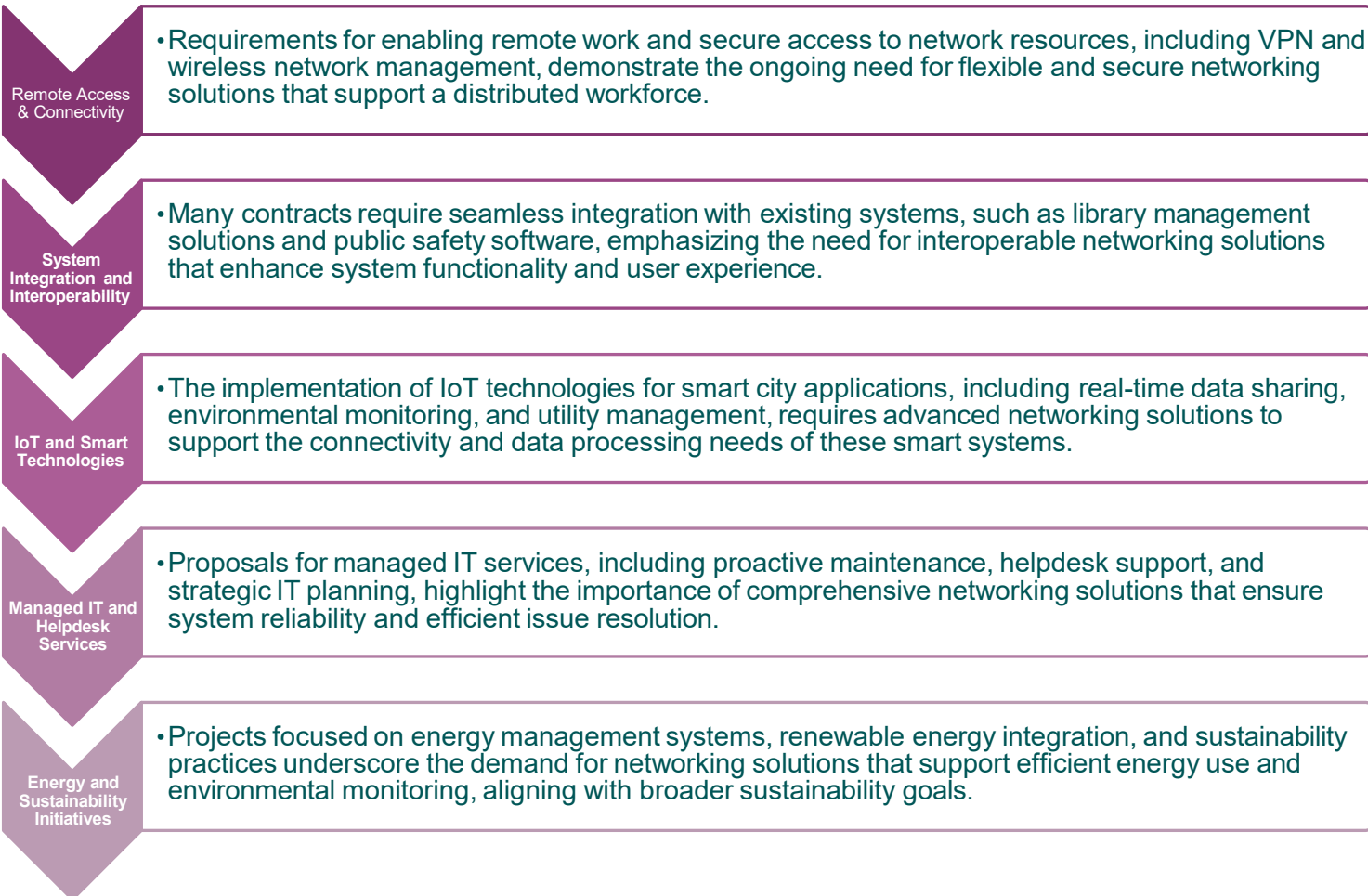
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High Level Trends in S&L

What S&L Buyers are Buying



What S&L Buyers are Buying



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Conclusion

S&L Recommendations

- ✓ **Emphasize Cybersecurity and Compliance** - Highlight Networking solution providers' advanced security features, including Zero Trust architecture, to address increasing cybersecurity concerns and compliance requirements.
- ✓ **Promote Integration and Interoperability** - Showcase the ability of Networking solution providers' solutions to seamlessly integrate with existing systems and technologies, enhancing operational efficiency and reducing complexity.
- ✓ **Support Infrastructure Modernization** - Position Networking solution providers as a key partner in smart city and infrastructure modernization projects, providing scalable and resilient networking solutions.
- ✓ **Highlight Cloud and Data Management Solutions** - Emphasize the benefits of cloud-managed networking and data governance solutions for improving operational continuity and disaster recovery capabilities.
- ✓ **Demonstrate Real-World Impact** - Provide case studies and success stories that illustrate tangible benefits and improved outcomes from implementing Networking solution providers' solutions in state and local government projects.



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