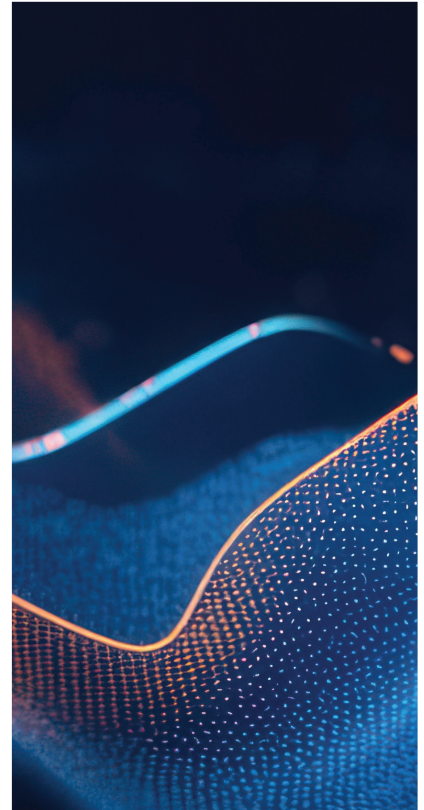
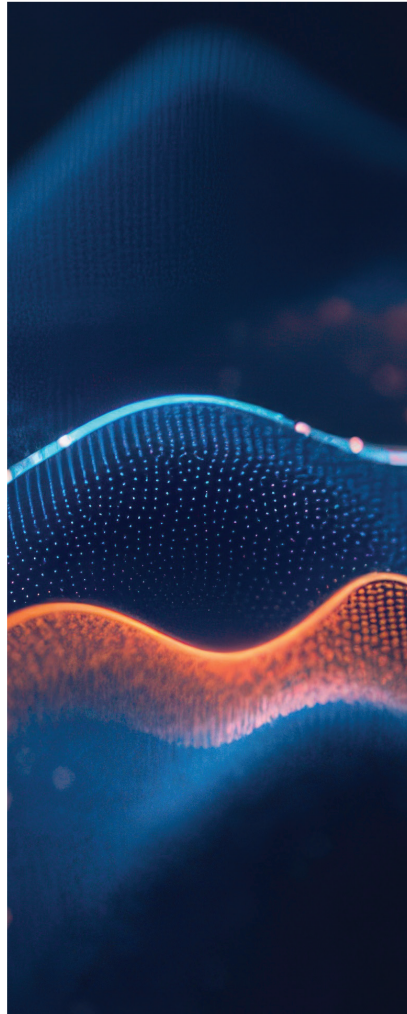


FROST & SULLIVAN
BEST PRACTICES



2026

NORTH AMERICAN SMART
CYBERSECURITY WATER UTILITY
SERVICES

COMPANY OF THE YEAR



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Best Practices Criteria for World-class Performance

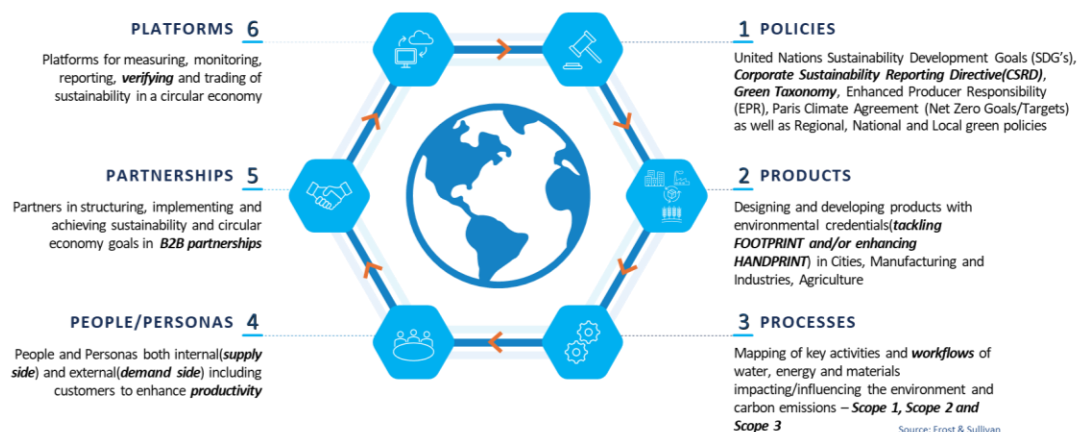
Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Rockwell Automation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

RECOGNITION CRITERIA	
<i>Visionary Innovation & Performance</i>	<i>Customer Impact</i>
Addressing Unmet Needs	Price/Performance Value
Visionary Scenarios Through Megatrends	Customer Purchase Experience
Leadership Focus	Customer Ownership Experience
Best Practices Implementation	Customer Service Experience
Financial Performance	Brand Equity

The Rising Threat of Cyber Crime in the Water Utilities Industry

The water utility services industry plays a critical role in ensuring safe drinking water and effective wastewater management, yet it faces intensifying pressure from environmental volatility, technological disruption, and economic constraints. A significant portion of the water and wastewater systems in the United States (US) are outdated, making them more vulnerable to breaks, leaks, and persistent inefficiencies. Adding to the burden, water utilities are facing an aging workforce, inefficient labor utilization, and ongoing difficulties in attracting new talent. These pressures are widening organizational knowledge gaps and contributing to persistent labor shortages that make it harder for utilities to maintain

The future of sustainability will rely on delivering “*more with less*” and shaped by the pathway of policies through to platforms.



reliable operations. Water and wastewater facilities are turning to digital transformation solutions to overcome these challenges.

Over the past two decades, water utilities have been integrating information technology (IT) with operational technology (OT) and industrial control systems (ICS). This convergence enables the deployment of digital solutions and emerging technologies to create smarter, more resilient systems and operations. These modern systems rely on vast networks of sensors, controllers, and software platforms

“As the digital transformation accelerates within the water utility services industry, Rockwell Automation understands that the best practice for industrial security is a holistic approach that applies multiple physical and electronic defense layers across varying operational levels through well-defined policies and procedures, leveraging a Policies2Platforms approach.”

**- Fredrick Royan,
Associate Partner, Sustainability**

While these efforts modernize operations and improve efficiency, they also introduce new cybersecurity risks as utilities become increasingly connected. This interconnectedness creates new potential entry points for cyber-attacks, including ransomware, data breaches, and disruptions to critical operations. These attacks can halt water treatment, interrupt distribution and wastewater management, and, in extreme cases, compromise water quality or release wastewater into environmentally sensitive areas. For example, the US Director of National intelligence reported 12 cyber attacks on 12 water and

wastewater management facilities across the US between November 2023 through April 2024.¹

Cyberattacks highlight the vulnerability of critical systems in the water utilities industry, prompting utilities to remain vigilant as cybercrime increases. The rising frequency and sophistication of attacks on critical infrastructure underscore the need for proactive cybersecurity measures that safeguard plant operations, distribution networks, remote sites, and sensitive data. The US Environmental Protection Agency encourages drinking water and wastewater systems to adopt prioritized cybersecurity practices that strengthen IT and OT, supported by a recommended checklist that helps utilities evaluate safeguards, identify gaps, and develop a structured plan for improving resilience. The agency further advises that systems conduct cybersecurity risk assessments at least every three to five years, or sooner when major operational or technological changes introduce new risks.² By prioritizing cybersecurity as a core component of digital transformation, utilities modernize safely, close operational gaps, and build the resilience needed to meet future demands.

Embedding Cybersecurity Across Digital Operations

Rockwell Automation, a US-based company, leads the industrial automation and digital transformation landscape and supports various industries, including the water utility services sector. The company delivers an integrated suite of smart water and cybersecurity solutions that enable water and wastewater utilities to modernize safely and operate more efficiently. These capabilities empower utilities to upgrade

¹https://www.dni.gov/files/CTIIC/documents/products/Recent_Cyber_Attacks_on_US_Infrastructure_Underscore_Vulnerability_of_Critical_US_Systems-June2024.pdf

²<https://www.epa.gov/system/files/documents/2024-08/epa-guidance-on-improving-cybersecurity-at-drinking-water-and-wastewater-systems-1.pdf>

aging infrastructure, boost productivity, reduce manual interventions, and safeguard essential services in an increasingly connected environment.

“Rockwell Automation established an enterprise customer experience function in 2024 by unifying its Customer Success and Customer Care. This move highlights the company's commitment to managing the customer journey with greater consistency and focus, ensuring clients receive comprehensive support from onboarding through daily operations and ongoing optimization.”

**- Richard Frigstad,
Best Practices Research Analyst**

As the digital transformation accelerates within the water utility services industry, Rockwell Automation understands that the best practice for industrial security is a holistic approach that applies multiple physical and electronic defense layers across varying operational levels through well-defined policies and procedures, leveraging a Policies2Platforms approach. Therefore, the company makes cybersecurity a foundational element of its smart water strategy. Unlike competitors that focus only on software or IT security, Rockwell Automation provides a fully integrated industrial control and cybersecurity

ecosystem purpose-built for critical infrastructure. Its integrated cybersecurity services proactively identify vulnerabilities, isolate critical networks, actively monitor threats, and safeguard essential control systems. This unified approach enables water utilities to modernize faster, operate more reliably, and manage risk more effectively while improving efficiency, enhancing safety, and ensuring regulatory compliance.

Water utilities often overlook cybersecurity, particularly when operations teams do not collaborate closely with IT departments, creating gaps in understanding how to safeguard digital solutions after installation. These gaps leave critical systems exposed to ransomware, remote intrusions, and disruptions that threaten service continuity and public safety. To address this challenge, Rockwell Automation proactively engages customers through cybersecurity assessments, education, and ongoing advisory support, raises awareness of evolving cyber threats, and guides utilities in identifying and closing vulnerabilities across their operational environments. Through this approach, the company supports utilities in understanding and addressing critical unmet needs in cybersecurity by embedding protection into the foundation of operations and sustaining resilience as digital ecosystems evolve.

Secure Smart Solutions Delivering Superior Returns

As water utilities advance digital transformation to overcome operational challenges, the cyberattack surface continues to expand. Many legacy OT systems were not designed with cybersecurity in mind, leaving critical infrastructure vulnerable to increasingly sophisticated and artificial intelligence-driven cyber threats. Without OT-specific security measures, utilities face heightened risks of downtime, safety incidents, and regulatory exposure that carry significant financial and operational consequences. To address these challenges, Rockwell Automation delivers an integrated portfolio of smart water and industrial cybersecurity solutions that protect digitally connected operations while maximizing performance value and cost efficiency.

Rockwell Automation's digital smart water solutions elevate utility performance by combining advanced hardware, software, and remote operations to improve visibility, optimize treatment and distribution, reduce energy consumption, and simplify maintenance. These capabilities drive measurable operating

cost reductions through lower energy usage, fewer unplanned outages, improved asset utilization, and reduced manual labor. At the same time, its cybersecurity capabilities strengthen protection across OT environments by supporting proactive threat detection, secure remote access, and vulnerability management, helping utilities avoid the high financial and regulatory costs associated with cyber incidents. Together, the company's smart water and cybersecurity capabilities deliver a strong price-to-performance value proposition by improving efficiency, lowering total cost of ownership, minimizing risk exposure, and enabling utilities to modernize securely without sacrificing financial discipline or operational reliability.

Making Secure Digitalization Simple and Scalable

Rockwell Automation notes that fewer than one in three water utilities (30.5%) have fully identified all OT-networked assets, reflecting a broader industry challenge where only 30% of critical infrastructure providers have a formal cybersecurity plan in place.³ The company follows a phased, lifecycle-based implementation approach that aligns technology deployment with each utility's operational maturity, risk profile, and modernization goals. The process begins with a comprehensive assessment in which Rockwell Automation evaluates OT and IT infrastructure, asset inventories, network architecture, cybersecurity posture, operational workflows, and regulatory requirements. This diagnostic phase uncovers performance gaps, cyber vulnerabilities, and modernization priorities by auditing digital assets, identifying risks, and pinpointing unmonitored devices that could serve as potential entry points for cyber threats. These insights guide the design phase and inform subsequent implementation and ongoing management to ensure security gaps are addressed before smart water solutions and integrated cybersecurity platforms are deployed.

Following its assessment, the company ensures each deployment is seamless and minimally disruptive for water utilities. Regardless of whether a utility runs exclusively on Rockwell Automation equipment, utilizes a blend of brands, or relies on aging systems, its smart water solutions and security enhancements are integrated without necessitating controller replacements or major plant modifications. This strategy prevents interruptions to critical operations such as treatment, pumping, or distribution, while keeping projects on budget by avoiding costly rip-and-replace procedures. Most water and wastewater utilities can implement its digital solutions and have initial visibility and foundational safeguards within a short period of time, with comprehensive protection measures following in the ensuing months. This streamlined modernization process allows utilities to quickly bolster their reliability and security, manage long-term costs more efficiently, and realize tangible returns on their investment in secure, digital operations.

Delivering Long-Term Value Through Lifecycle Partnership

Rockwell Automation's fully integrated portfolio of smart water and industrial cybersecurity solutions moves beyond fragmented deployments to enhance the ownership experience through sustained performance, resilience, and long-term operational reliability. Rather than treating automation and security as one-time deployments, the company positions both as part of a continuous, lifecycle-driven

³ https://literature.rockwellautomation.com/idc/groups/literature/documents/ap/gmsn-ap002_-en-p.pdf

partnership supported by real-time system monitoring, remote administration, patching, and ongoing optimization. This approach gives utilities sustained protection, predictable performance, and confidence that their connected operations remain secure and reliable as cyber threats evolve.

Rockwell Automation's smart water solutions enhance ownership value for water utilities by securely connecting treatment plants, pumping stations, and distribution networks through automation, real-time visibility, and advanced control systems. These capabilities enable utilities to optimize treatment processes, improve distribution efficiency, and reduce energy consumption. The company's smart water solutions also streamline maintenance through predictive and condition-based insights, directly lowering the operating burden and total cost of ownership for water utilities.

In addition, Rockwell Automation also offers lifecycle asset and cybersecurity management as an optional, ongoing service, helping water utilities reduce risks associated with aging infrastructure while supporting future-ready networks that scale with operational needs. As part of these offerings, the company provides utilities with enhanced visibility into system performance and security conditions, transforming operational data into prioritized, actionable insights that help teams focus on their most critical risks and improvement areas. Through its lifecycle services and cybersecurity support options, Rockwell Automation eases the ownership burden for utilities that face limited IT and cybersecurity resources, while strengthening long-term system resilience.

Ensuring Customer Success with Expert-led Support

Rockwell Automation sets itself apart by delivering an exceptional customer service experience grounded in deep technical expertise, proactive support, and a genuine customer-first culture. The company's dedication extends well beyond implementation, with specialized technical support centers, field service engineers, and remote support specialists providing rapid troubleshooting and real-time assistance when needed. Training and knowledge transfer are also prioritized, with instructor-led workshops, digital learning modules, and operator-focused programs designed to ensure staff remain confident and capable long after installations. By treating training as an ongoing process, Rockwell Automation fosters lasting confidence, adaptability, and independence among frontline workers. This sustained investment in human capability leads to higher uptime, safer operations, and greater overall equipment effectiveness for customers.

To ensure continuous improvement, Rockwell Automation actively gathers feedback from technical support interactions, sales engagements, and annual surveys sent to clients, whether they purchase directly or through distribution partners. These insights allow the company to track evolving customer expectations, identify emerging needs, and refine its service offerings. In response to this feedback, Rockwell Automation established an enterprise customer experience function in 2024 by unifying its Customer Success and Customer Care.⁴ This move highlights the company's commitment to managing the customer journey with greater consistency and focus, ensuring clients receive comprehensive support from onboarding through daily operations and ongoing optimization.

Insights from these surveys also drive enhancements to Rockwell Automation's digital tools, knowledgebase resources, and global supply-chain responsiveness. This high level of engagement is

⁴ https://literature.rockwellautomation.com/idc/groups/literature/documents/sp/5058-sp125_-en-p.pdf

particularly valuable for water utilities, which depend on operational continuity, accessible support, and a lasting vendor partnership.

Frost & Sullivan recognizes that Rockwell Automation's commitment to proactive communication, education, responsive support, and continuous improvement maintains high customer satisfaction and strengthens long-term relationships across its client base.

A Leading Technology Partner for Water Utility Operations

Rockwell Automation's customer-first culture and proactive engagement strategy establishes the company as a trusted, informed, and forward-looking partner within the water utility services industry. By providing ongoing educational outreach through webinars and industry forums, Rockwell Automation empowers utility organizations to stay ahead of emerging trends, regulatory changes, and evolving cybersecurity threats. This consistent guidance reinforces the company's role as a strategic ally that enables utility organizations to anticipate challenges, mitigate risks, and future-proof their operations.

Strategic partnerships further strengthen Rockwell Automation's brand perception. For example, the company's long-standing collaboration with Brock Solutions, a global engineering and professional services firm, enables the delivery of real-time solutions across the industrial and utility sectors. In June 2025, Rockwell Automation shared how this partnership transformed the Region of Waterloo's aging water infrastructure, unifying its systems to improve troubleshooting, increase capacity, and reduce maintenance costs.⁵ With the introduction of centralized controls and enhanced analytics, the Region of Waterloo achieved reduced downtime, stronger cybersecurity, and compliance with regulations, resulting in a more efficient and future-ready water operation.

By fostering long-term relationships, delivering ongoing education continually enhancing its solutions based on customer feedback, Rockwell Automation is viewed as a dependable and deeply invested partner in the water utilities market. As a result, utility organizations increasingly see the company not as a technology provider, but as a strategic ally—one that strengthens operational resilience, addresses workforce gaps, and supports long-term performance and infrastructure goals.

⁵ <https://www.rockwellautomation.com/en-ca/company/news/case-studies/modernize-water-system.html>

Conclusion

Rockwell Automation establishes itself as a trusted transformation partner for the water utility services industry by addressing critical unmet needs in cybersecurity, operational efficiency, and infrastructure modernization through an integrated portfolio of smart water and cybersecurity solutions. The company's strong price-to-performance value enables utilities to improve reliability, reduce energy and maintenance costs, lower total cost of ownership, and manage escalating cyber risk without sacrificing financial discipline. Rockwell Automation delivers a personalized experience tailored to the unique needs of water utilities through a structured, low-disruption deployment model, lifecycle services, and optional managed cybersecurity support. Backed by its customer-centric strategy, continuous innovation, and a growing ecosystem of strategic partners, the company continues to strengthen its brand as a dependable, forward-looking ally that enables water utilities to operate more securely, efficiently, and with greater confidence in an increasingly digital environment.

With its strong overall performance, Rockwell Automation earns Frost & Sullivan's 2026 North American Company of the Year Recognition in the smart cybersecurity water utility services industry.

What You Need to Know about the Company of the Year Recognition

Frost & Sullivan's Company of the Year 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 Company of the Year Recognition, 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 to create growth opportunities across the entire value chain

Visionary Scenarios Through Megatrends: Long-range scenarios are incorporated into the innovation strategy by leveraging mega trends and cutting-edge technologies, thereby accelerating the transformational growth journey

Leadership Focus: The company focuses on building a leadership position in core markets to create stiff barriers to entry for new competitors and enhance its future growth potential

Best Practices Implementation: Best-in-class implementation is characterized by processes, tools, or activities that generate consistent, repeatable, and scalable success

Financial Performance: Strong overall business performance is achieved by striking the optimal balance between investing in revenue growth and maximizing operating margin

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)**

