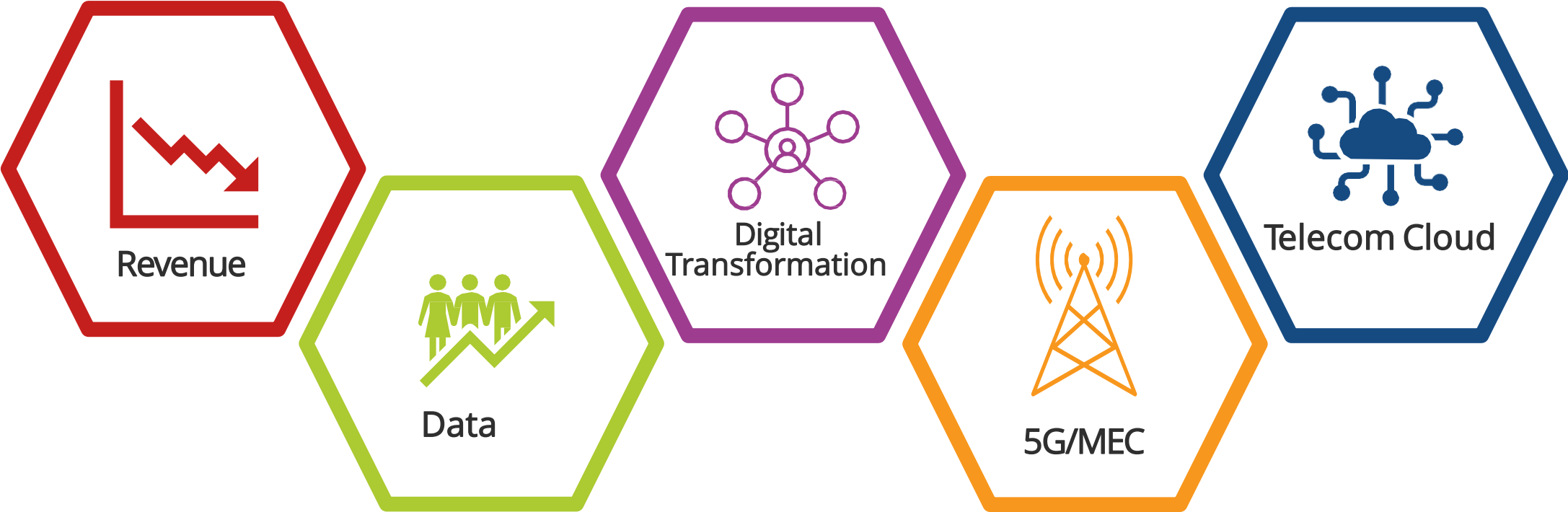


Telco Transformation: 360 view and opportunities

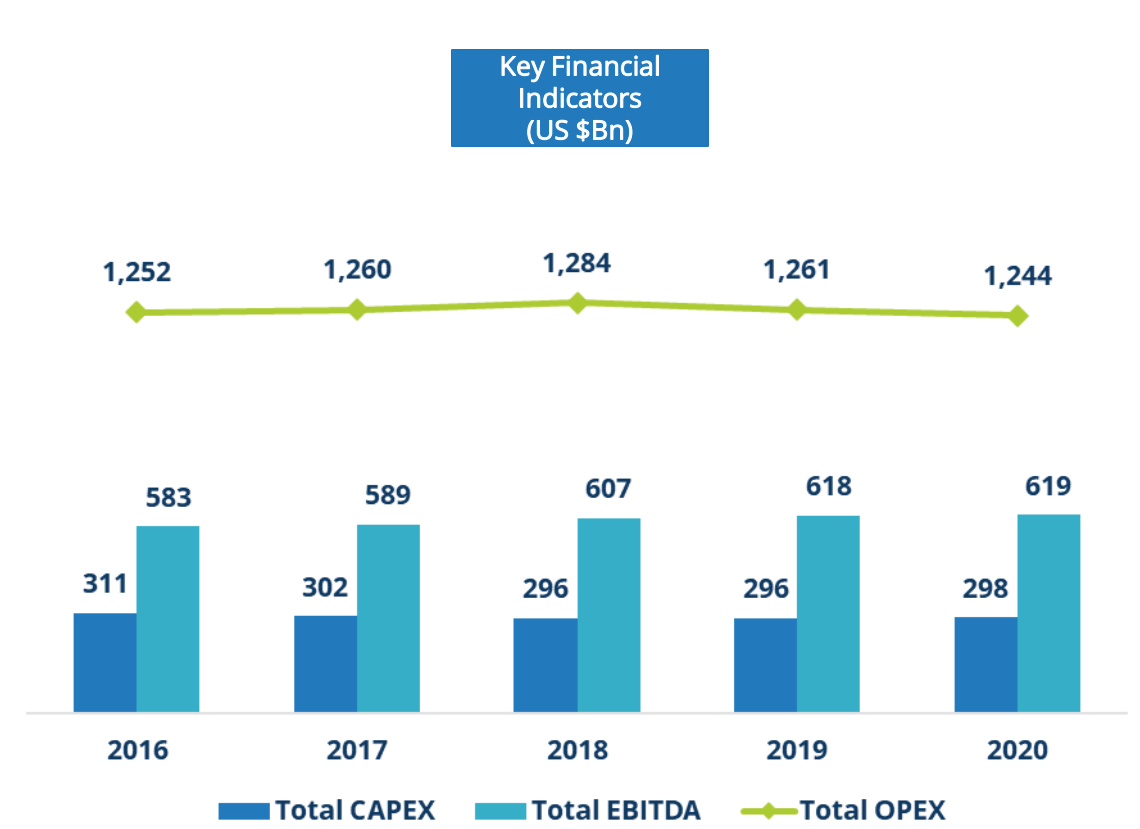
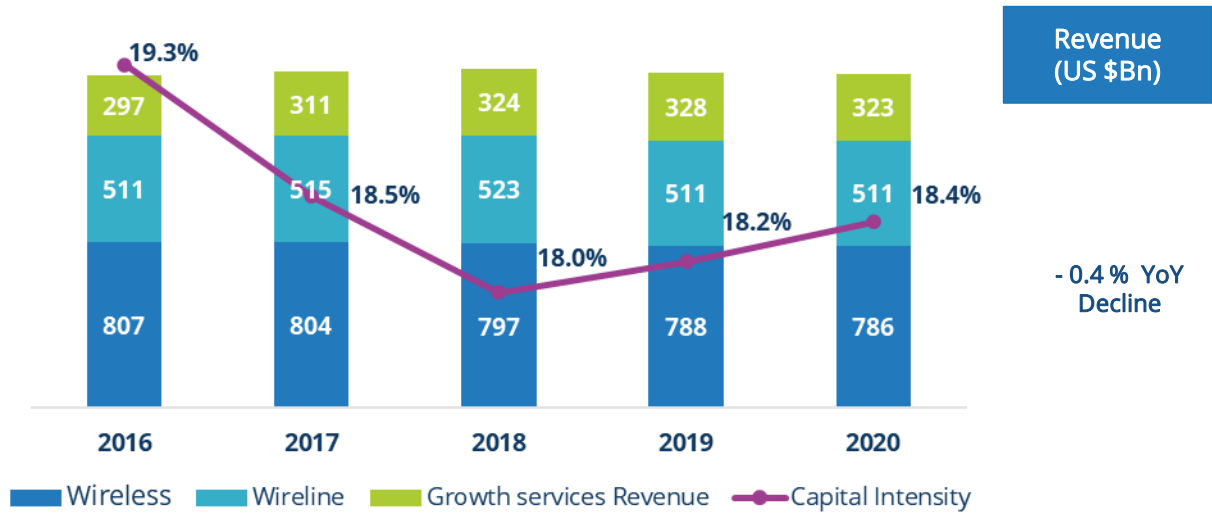
IDC Latin America: Tech CMO Forum 2022

Emergence of the Telco Cloud: Key Industry Drivers





Worldwide Telecom Industry Performance



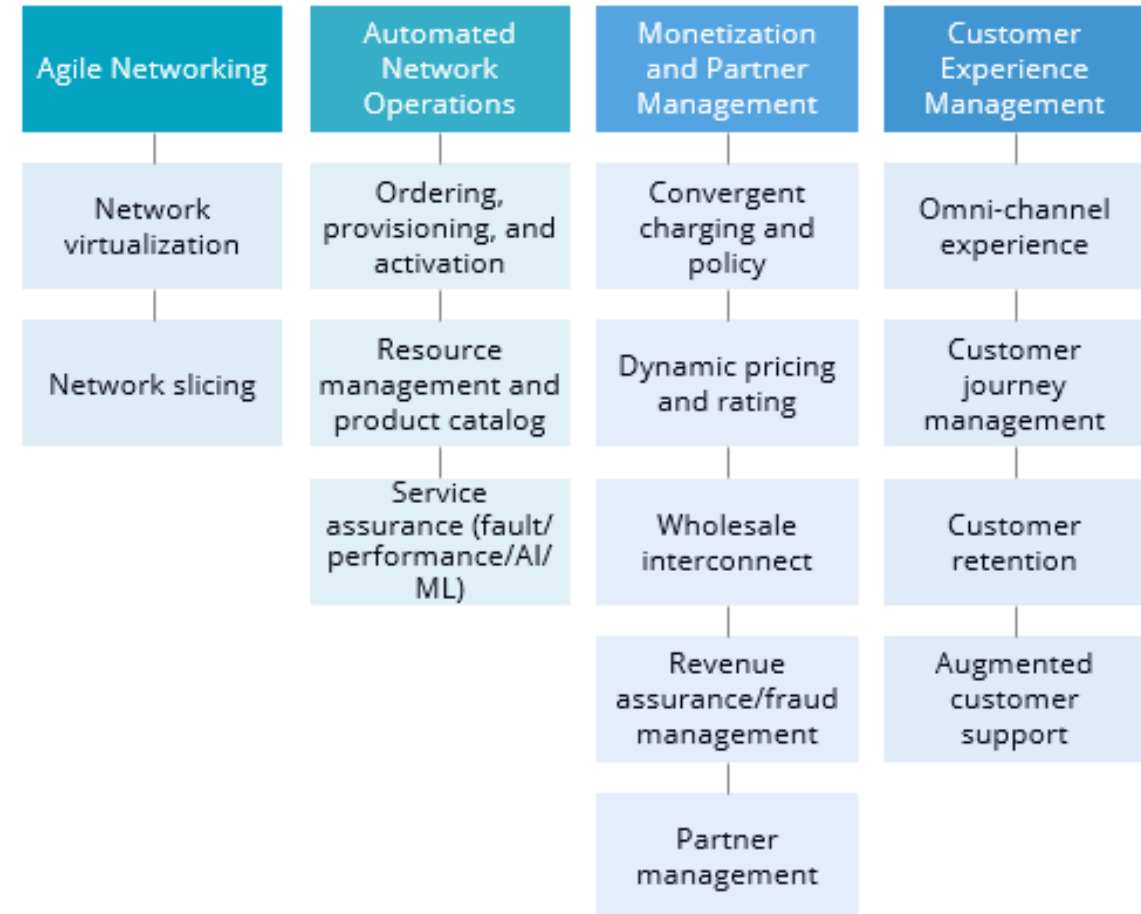
Growth Services Revenue includes revenue from business services such as Hosting, Colocation, Cloud, Ethernet, VPN, MPLS etc.,

Note :
 OPEX includes Depreciation & Amortization and Cost of goods Sold
 Capex excludes Spectrum/License investment.
 Revenues exclude non-core/non-telco revenues.

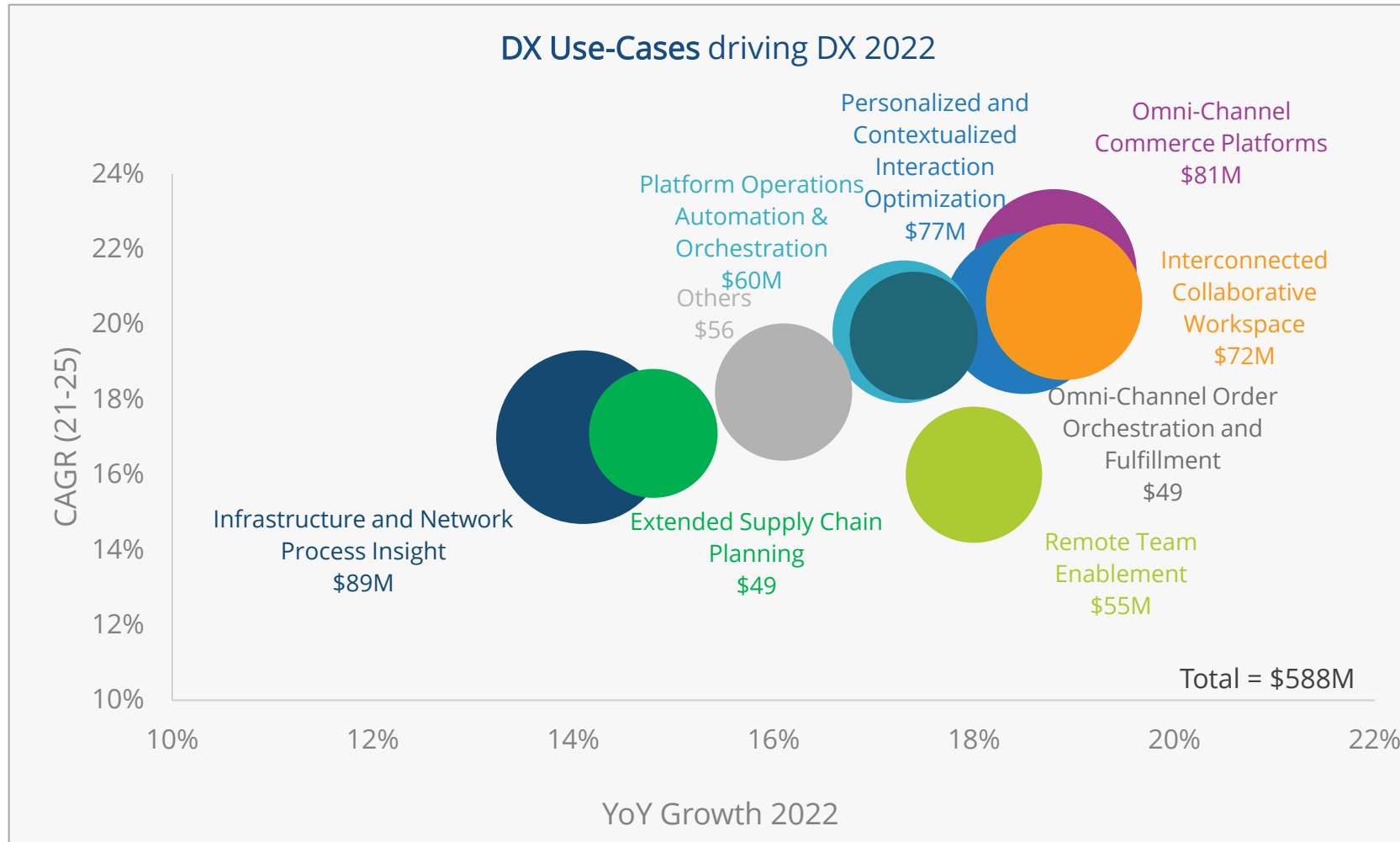
Agility and Automation to Drive Telecom Digital Transformation

Telecom Digital Mission: “Support and Enable Diverse, Connected Communities”

Telecom Strategic Priorities



USD\$M 588 Telecom Digital Transformation Use Cases



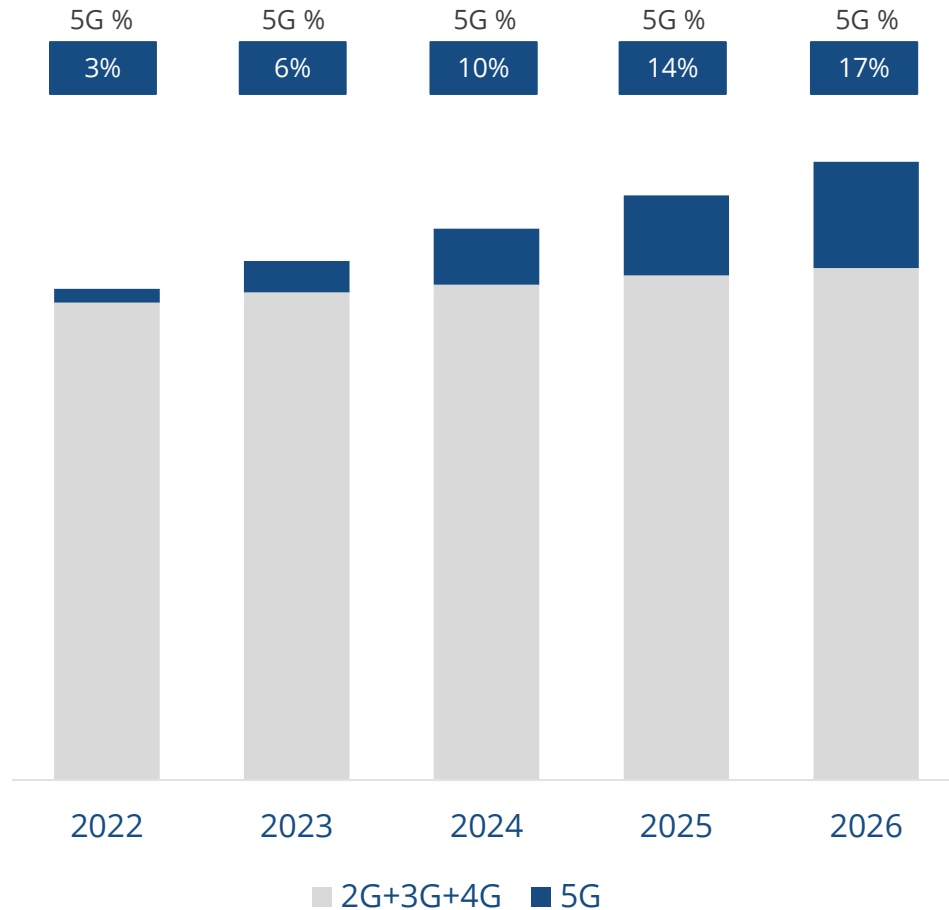
In 2022, total spending in the top use cases, that are cross-industry, is expected to exceed **US\$1.91B**:

- Innovate, Scale, Operate**
 (making, building, and designing activities. Core business functions that make up this area include supply chain management, engineering, design and research, operations)
- Back-Office Support and Infrastructure**
 (Core business functions that make up this area include accounting/finance/billing, human resources, legal, security and risk, and enterprise).
- Customer Experience**
 (covering all customer-related functions and related Technologies supported by DX. Core business functions that make up this area include customer services, marketing, and sales.)
- 360 Degree Customer and Client Management**
 (better engagement and experience throughout the customer journey. Includes CRM, AI applications, loyalty applications, and social media=



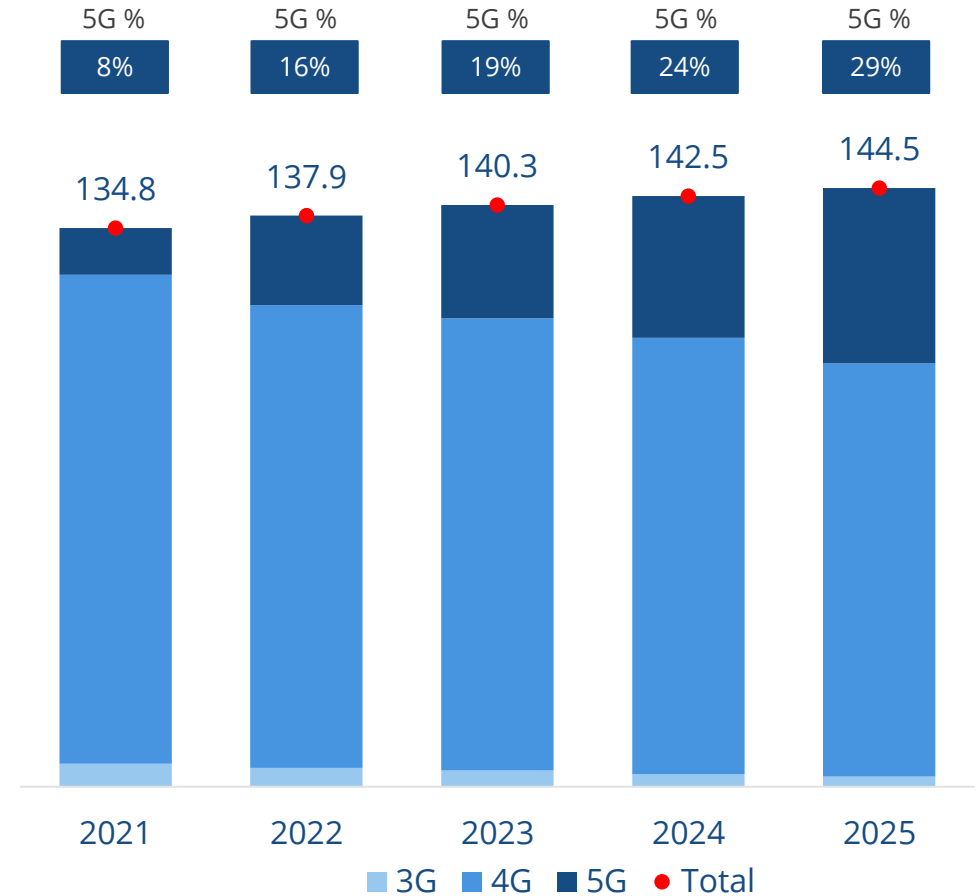
5G start to emerge in Latin America as Spectrum Auctions start to take place

Mobile Subscriptions Forecast (2022-2026) Latin America – Million Units by Generation



Source: Worldwide Semiannual Telecom Services Tracker – IDC, May 2022

Smartphone Forecast (2021-2025) Latin America – Million Units by Generation



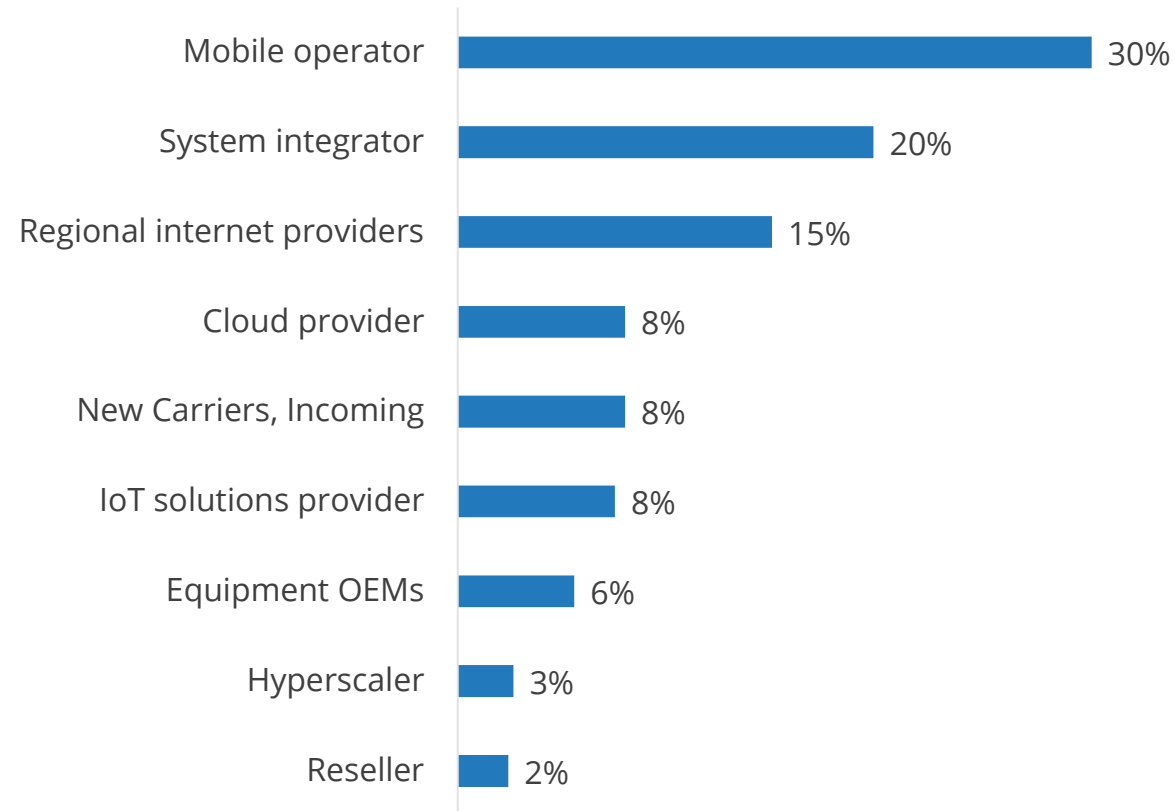
Source: IDC Mobile Phone Tracker Forecast 4Q21



Regional Vendors and Integrators Gain Space as Potential 5G Solution Providers

Potential 5G Solutions Provider Latin America

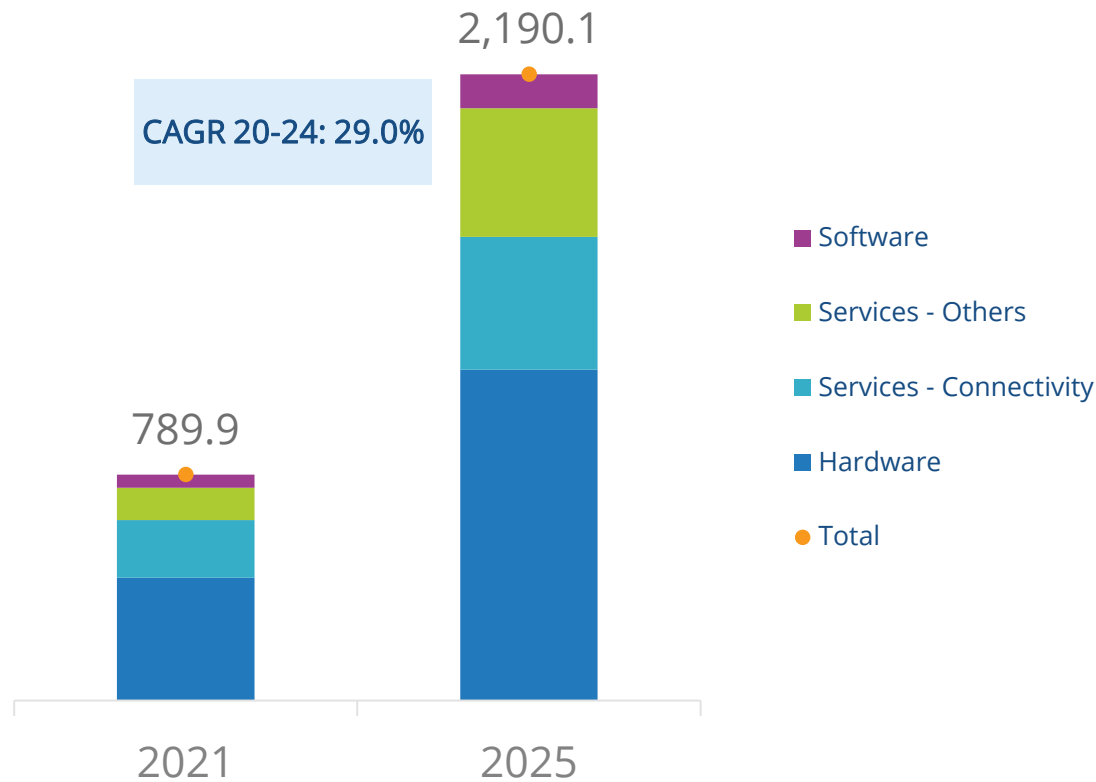
Q: Who do you consider the most likely partner/vendor to develop and implement 5G use cases in your organization?



Infrastructure and Connectivity to Drive Telco Edge Investments in Latin America



Service Provider Edge Spending Forecast 2021-2025 Latin America | US\$M

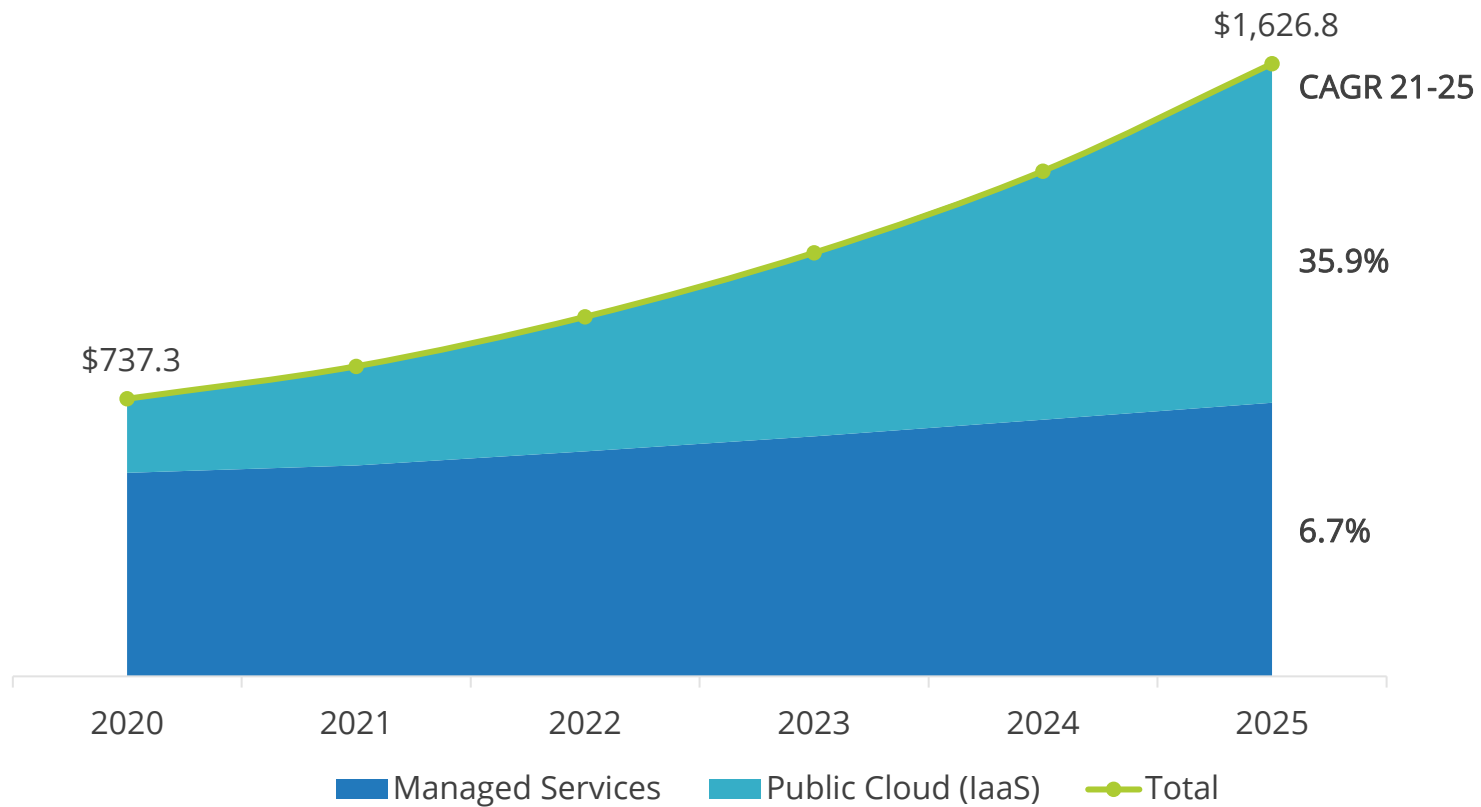


Service Provider Edge Spending By Use Case 2022 Latin America | Ranking

- 1 Content Delivery Network
- 2 Virtual Network Functions
- 3 Multiaccess Edge Computing

Telcos Public Cloud Infrastructure will grow significantly, driven the need to orchestrate data and the emergence of AI

Spending on Cloud Infrastructure Vs. IT Technology Outsourcing (2020 – 2025)
Latin America – Telecom Industry (US\$M)



Top Growing PaaS Categories
Latin America – Telecom Industry


| PaaS Category | CAGR 21-25 |
|--|------------|
| Artificial Intelligence Platforms | 86% |
| Data Management Software | 45% |
| Analytics and Business Intelligence Software | 44% |
| Application Platforms | 40% |
| Integration and Orchestration Middleware | 36% |
| Software Quality and Life Cycle Tools | 35% |
| Application Development Software | 27% |

Source: IDC Public Cloud Spending Guide and ICT Spending Guide Industry and Company Size- IDC, June 2021




CSP Cloud Business Models: Telco Operations Cloud

North American Operators are focusing on internal network transformation to Cloud platforms.



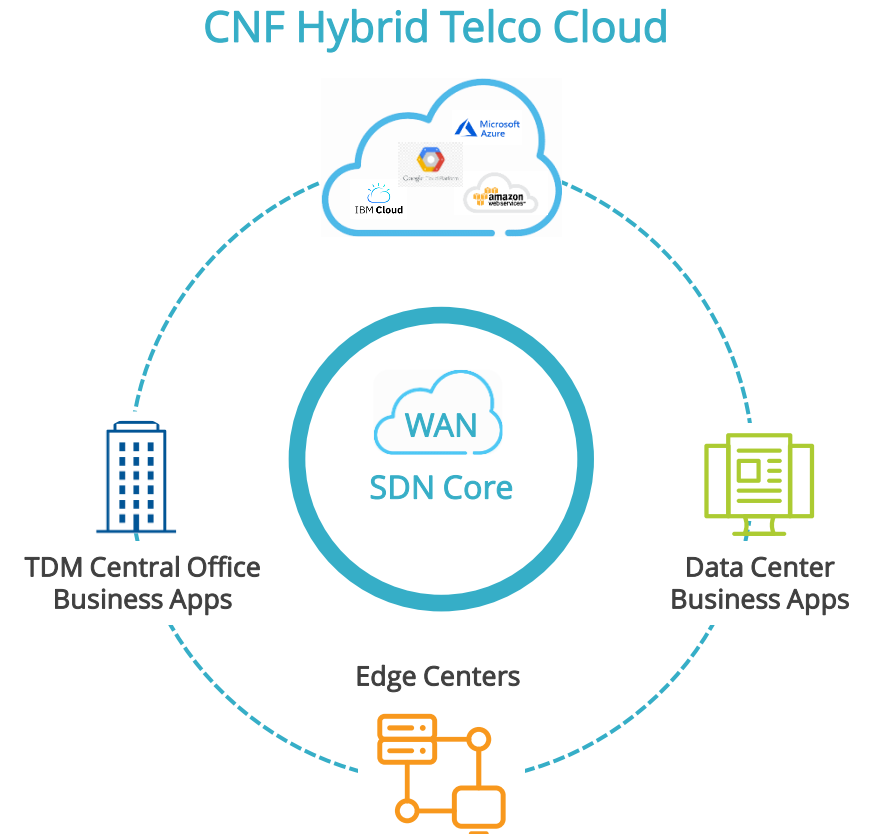
AT&T

Leveraging cloud to migrate core



verizon

Early Deployment of SDN/NFV Disaggregation





CSP Cloud Business Models: Expansive Telco Cloud Platforms

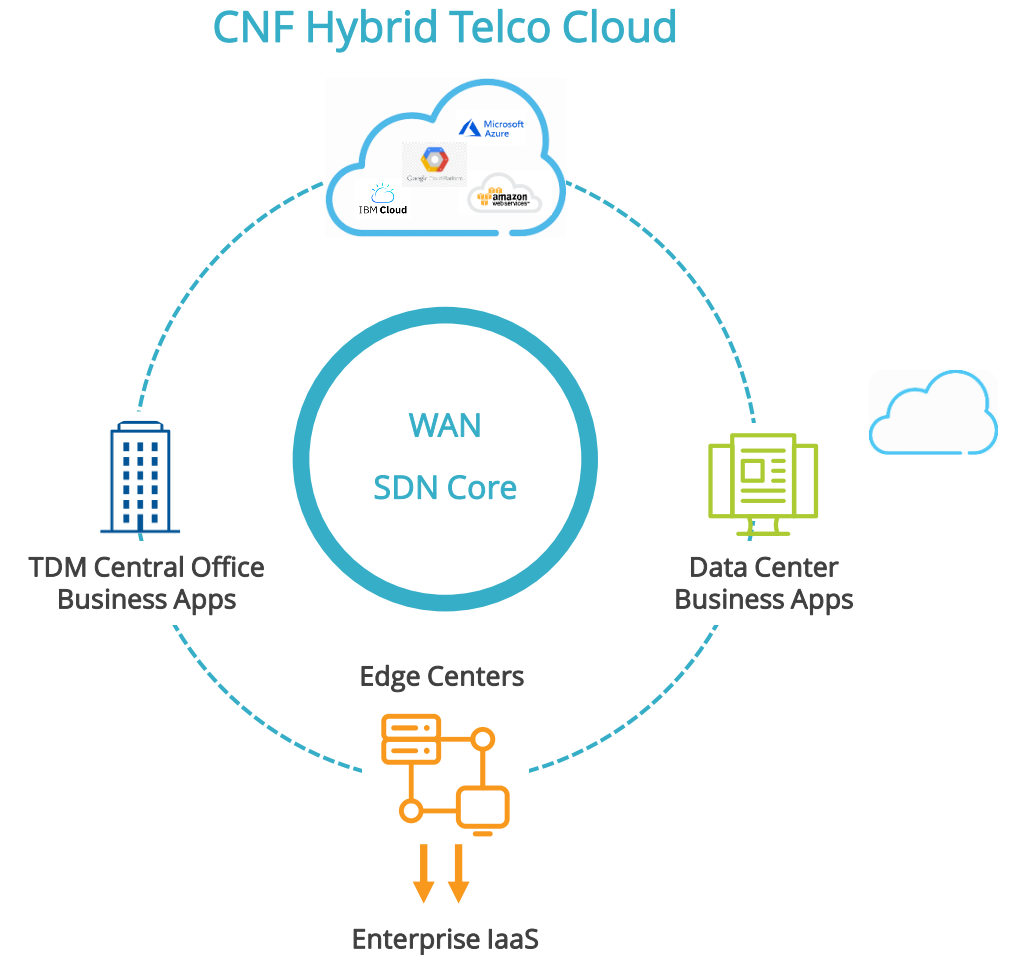
European Network Service Providers are aggressively implementing internal Cloud Native Infrastructure and Managed Enterprise Cloud offers

Telefonica

Built on Public Cloud platforms, (5G core/AI)

orangeTM

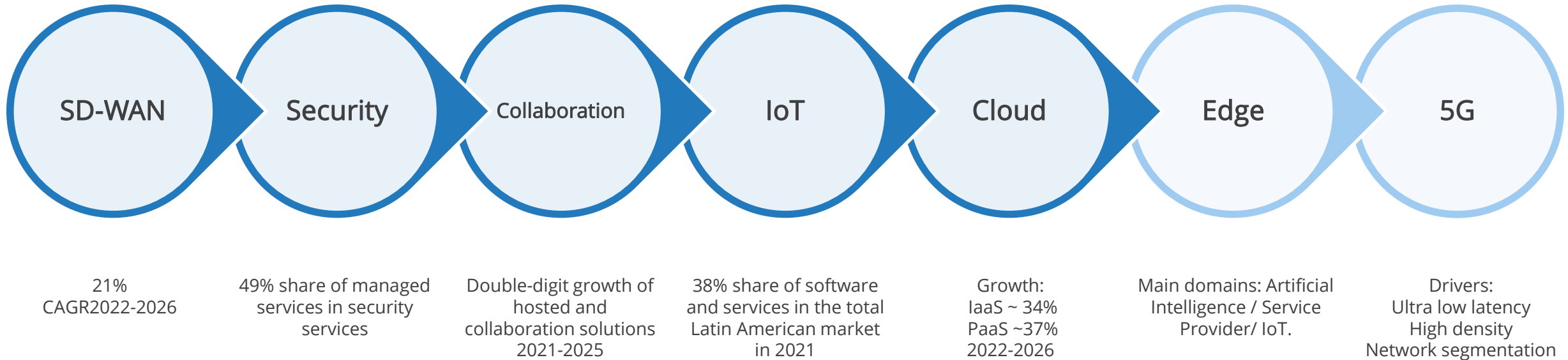
Orange has leveraged cloud internal platform



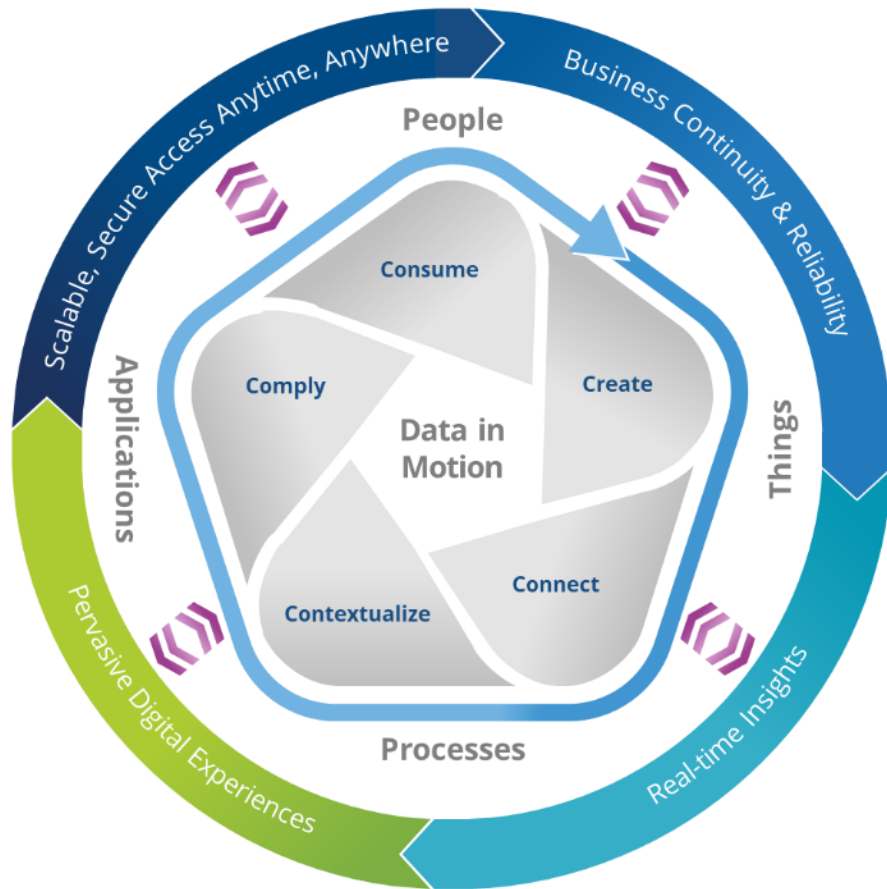
CSPs B2B Trends for 2022+

2022-2023

2023+

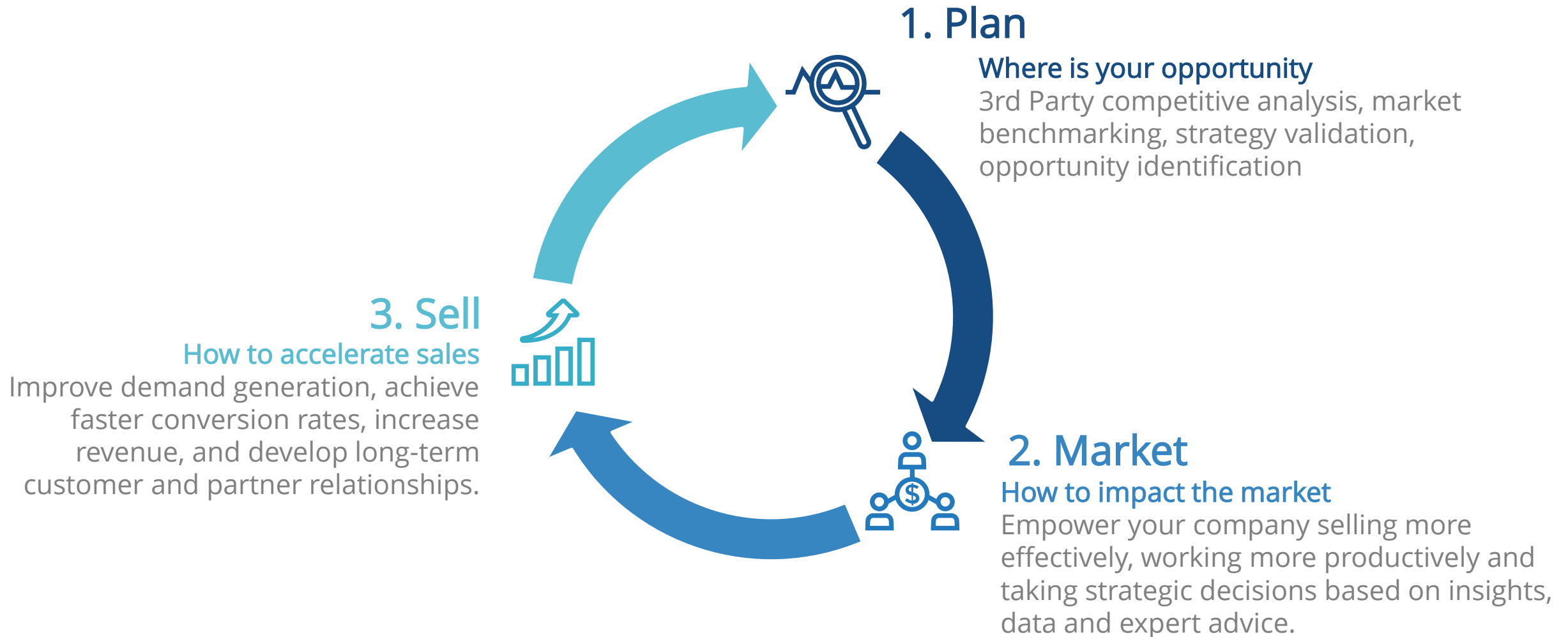


The Future of Connectedness Business Outcomes



- **Scalable, Secure Access Anytime, Anywhere**
 - Allows for worker productivity and customer satisfaction, unbroken supply chains
 - Maintains the human connection, flexibility to work anywhere
 - **Business Outcomes: Improved worker productivity, Increased customer satisfaction**
- **Business Continuity and Resiliency**
 - Allowing enterprises to stay connected during crisis to deliver on SLAs, maintain business
 - Talk about lessons learned during Covid and need for this in natural, social, economic disasters
 - **Business Outcomes: Sustained revenues, Improved worker safety/communication**
- **Real-Time Insights**
 - Allowing insights to be reviewed/understood 24/7 or as needed by the business
 - Talk about the need to scale access depending on demands for data
 - **Business Outcomes: Accelerate creativity/innovation, faster decision making**
- **Pervasive Digital Experiences**
 - Ensure sufficient coverage and capacity to deliver digital information, commerce, collaboration among employees, customers, partners
 - **Business Outcomes: Higher customer engagement, stronger brand loyalty**

Using its **accurate** research methodologies and **thought leadership**, IDC helps you



Insights: IDC's Data Solutions Provide Critical Guidance

| | | | | | |
|--|--|--|---|--|---|
|  <p>MAP ICT DEMAND</p> |  <p>PINPOINT OPPORTUNITIES</p> |  <p>ASSESS MARKET & COMPETITIVE POSITION</p> |  <p>DEFINE CUSTOMER TARGETS</p> |  <p>BUILD SALES PIPELINE</p> |  <p>OPTIMIZE YOUR PARTNER NETWORK</p> |
| <p>Black Books and Market Reports (CIS)</p> <p>Total market view</p> | <p>Spending Guides</p> <p>Holistic ecosystem view by use case</p> | <p>Trackers</p> <p>Detailed vendor and technology segmentation</p> | <p>Tech Buyer Budget Benchmark</p> <p>IT spend by company</p> | <p>Contracts Database</p> <p>Contracts details and renewal dates</p> | <p>Channel Partner Ecosystem</p> <p>Explore the Universe of potential partners for your offering</p> |
| <p>MI, Strategy, Research</p> | <p>MI, Strategy, Product Marketing, Research</p> | <p>MI, Strategy, Product Marketing, Sales</p> | <p>Sales, Marketing</p> | <p>Sales</p> | <p>Strategy, Sales, Partners, Business Development</p> |

Influence: IDC's Custom Solutions Strengthen Your Marketing and Sales Strategies.

| | | | | |
|--|--|---|--|--|
|  BUSINESS VALUE TOOLS |  SALES ADVISORY |  CONTENT DEVELOPMENT |  AUDIENCE DEVELOPMENT |  ENHANCE YOUR EVENT |
| Auto assessment Tools and End Users Workshops | Win/Loss Analysis and Sales Workshops | Documents, Visual, Media | IDC Virtual and Physical Events | Speakers and Your Event Plus |
| Online lead-generation tools | Empower your sales team and partners | Developing compelling and relevant content | Invaluable time with business decision makers | Strengthen your event and reinforce your recruiting activities |
| GM, Strategy, Marketing, Business Development, Sales, Partners | GM, Strategy, Marketing, Business Development, Sales, Partners | Marketing, Sales, Partners | Marketing, Sales, Partners | Marketing |



Thank you!

Diego Anesini
Research Director, Latin America
danesini@idc.com



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