Telecommunications Network Operators: 1Q22 Market Review

About the TNO Market Review report:

MTN Consulting's 1Q22 TNO Market Review analyzes the financial growth and development of the telecommunications sector, with a focus on network infrastructure spending. The report's dashboard allows a user to dig into revenue, profitability and cost trends for individual operators, benchmarking results against market and regional averages. The report is designed to help vendors understand and plan for the needs of their customers and help network operators deploy their technology budgets wisely.

Scope of the report:

- Global coverage with company-level drilldowns for 138 telecommunications network operators (TNOs, or telcos)
- Company-level revenue, capex and headcount trends for 138 individual TNOs. Regional level breakouts of revenue and capex trends.
- A deeper assessment of labor costs, opex and operating profit trends is covered for a subset of 79 TNO. For the same sample, the report covers annual data (i.e. from 2011-21) of KPIs that include debt (short term debt & long-term debt), cash and short term investments, cash flow from operations and free cash flow
- Network-related spending estimates at the market- and company-level, across quarters

Report structure and key sections

| Abstract | Analysis | Key Stats | Labor Stats | Operator rankings | Company deepdive | Country breakouts | Regional split | Raw Data | Subs & traffic |

ANALYSIS tab:

Trend analysis summary of how the overall market and key operators have evolved from 2011 to 2021, with a focus on the latest quarter ending 1Q22. Sections address the following topics:

- Revenue, capex and margin trends
- Sector and company profitability and opex trends
- Labor cost market analysis and revenue per employee trends
- Country wise capex and 5G trends

COMPANY DEEPDIVE tab:

A dynamic and interactive dashboard mapping the user-selected operator's performance relative to large peers within the region based on the selected metrics. The user can also compare the operator performance with global averages; regional and country averages. Individual charts and data tables address the operator's:

- Revenue growth rates
- Operating margins
- Capital expenditures as a % of revenues
- Labor costs per employee and as a % of revenues

<u>Operator coverage</u>

Related Reports:

1. **Network Operator Forecast Through 2026 (June 2022 Update)**
2. **Telco Opex Analyzer, 2016-21**
3. **Webscale Network Operators: 1Q22 Market Review**