



TELECOM ITALIA GROUP



Capacity Middle East 2013

Face the challenge relying on core competencies

Riccardo Delleani
Chairman

Market is changing and we have to adapt rapidly



Changing Scenario

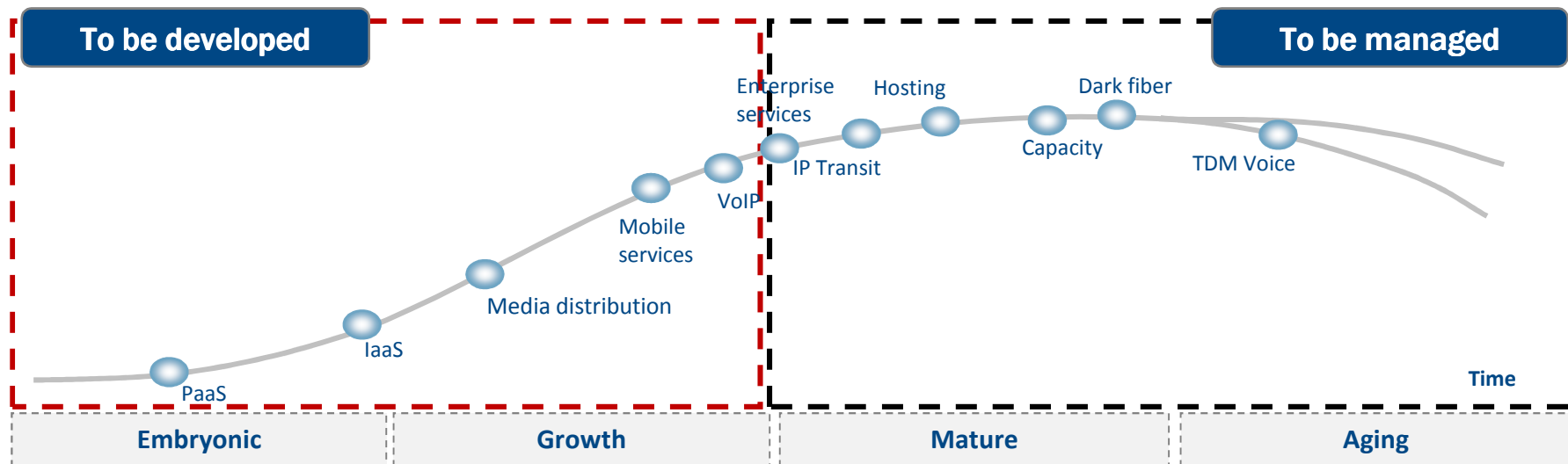
Our competitive scenario is rapidly changing with a growing separation between infrastructure and services

Opportunity to change

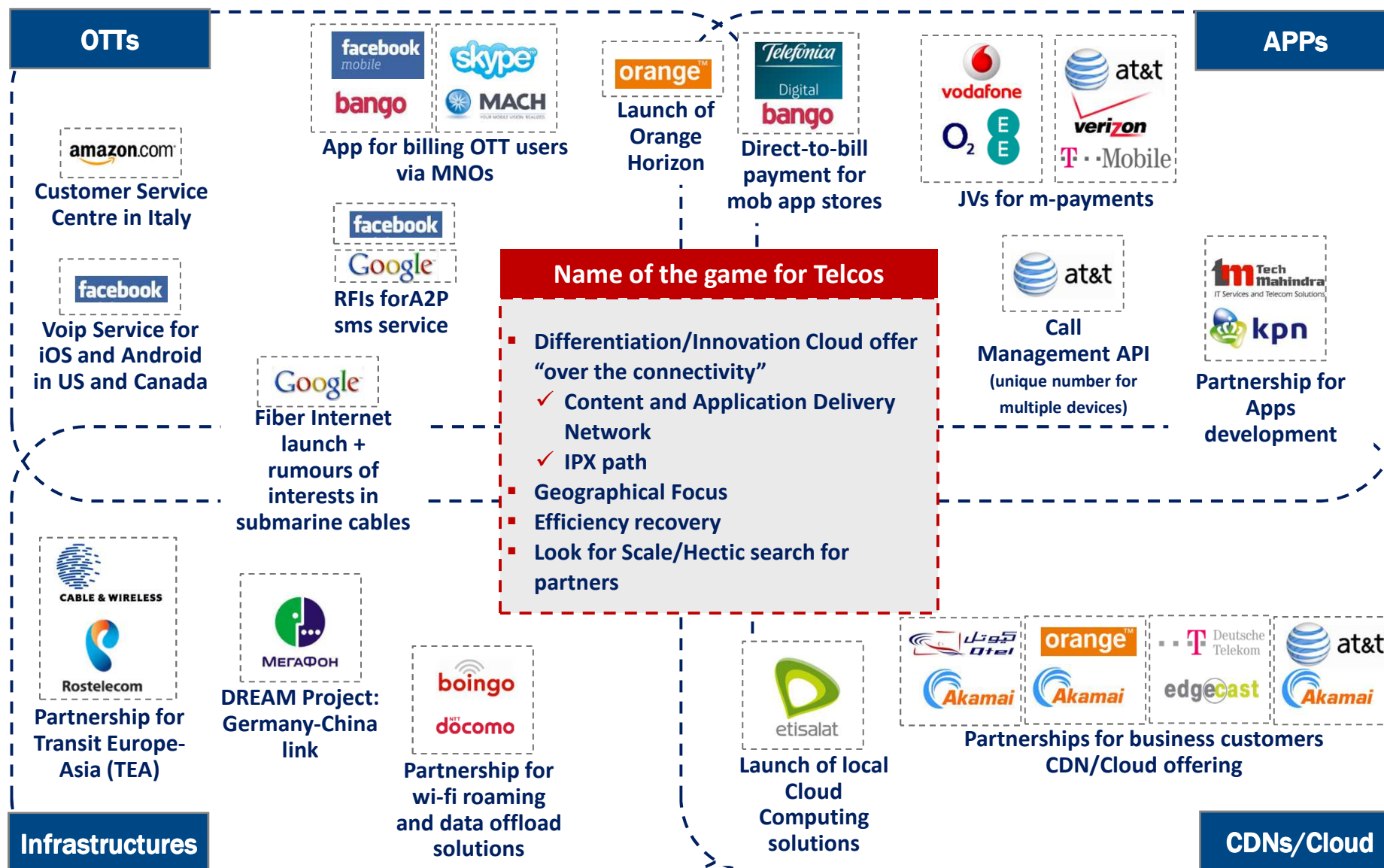
Core Services Lifecycle

Our core services are commoditizing and our defensive efforts risk to be ineffective

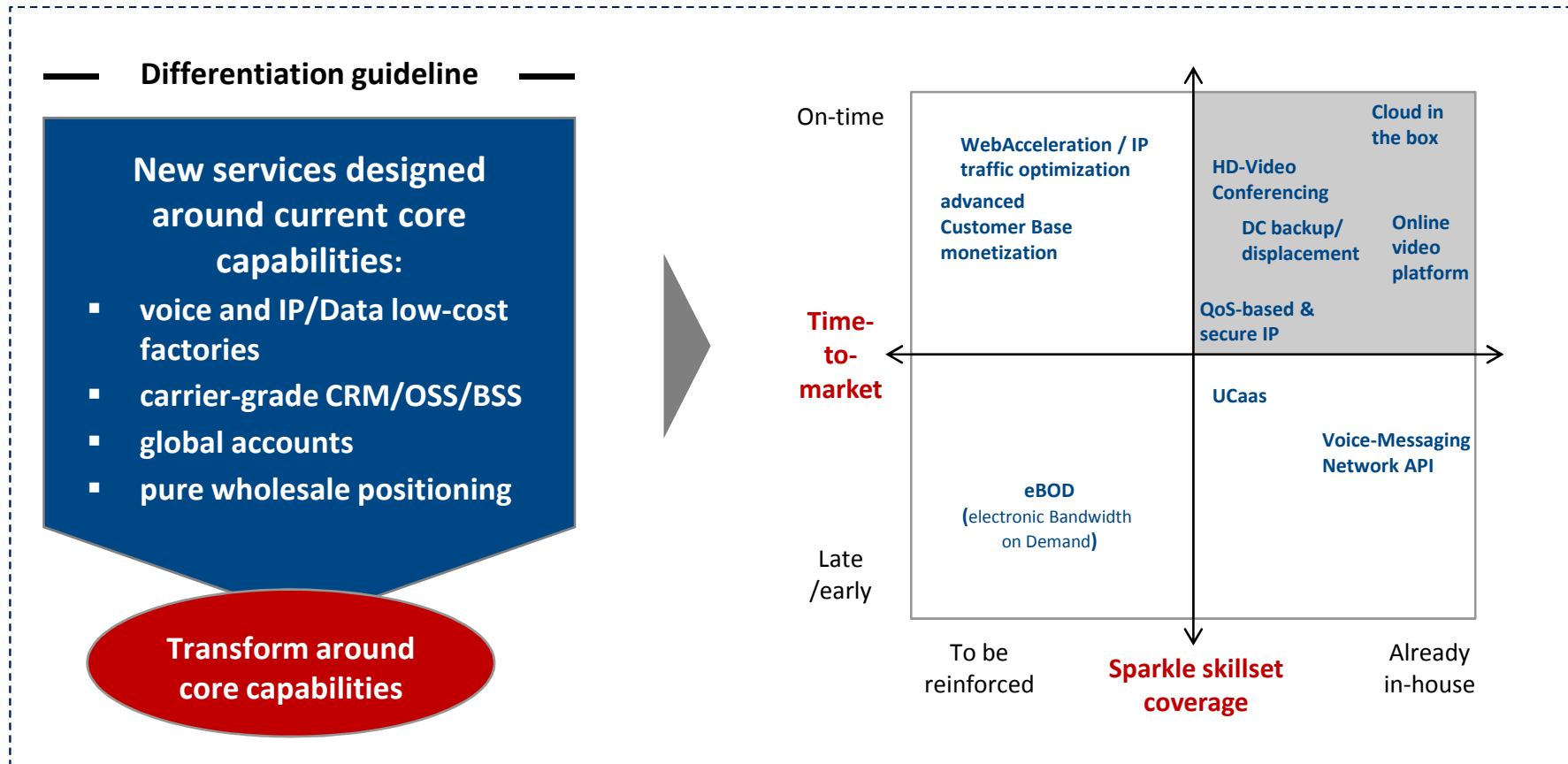
Need to change



A steaming scenario asks for smart answers



Our answer is a service portfolio diversification path...

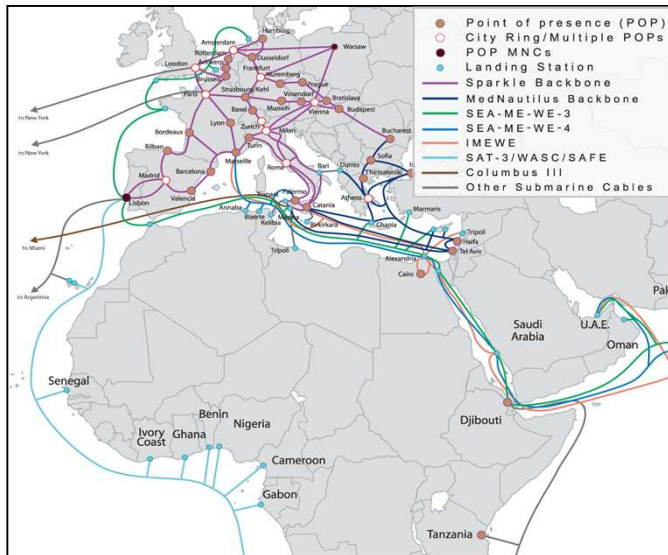


Build a managed solutions suite around Sparkle's core capabilities

... built on a solid, capillar and state-of-the art network



Consolidate Sparkle “Tier1” backbone role



- Implementing 100Gb lambdas technology on Mediterranean Nautilus submarine cable System
- Opening new POPs
- Upgrading existing cables capacity and exploring new ventures

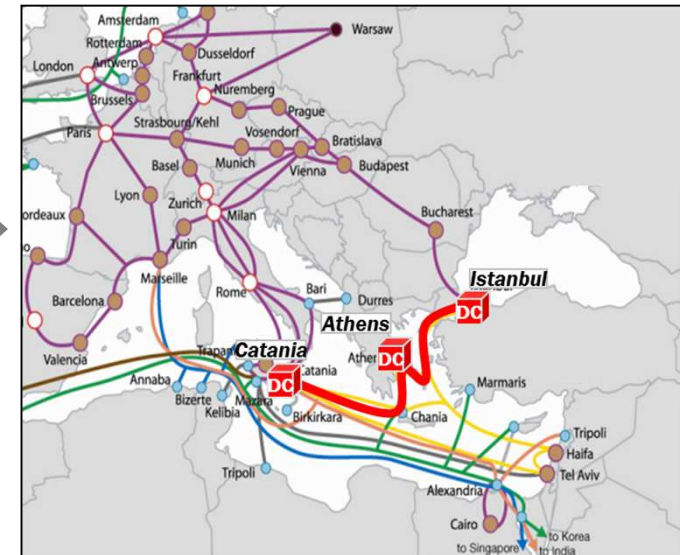
Services layer

Climb the value chain

Transport layer

Expand coverage and innovate

Transform Sparkle in a “smart” data-company



- Executing a Datacenter/Cloud strategy in the Mediterranean region
- Pursuing a service portfolio expansion towards new network applications

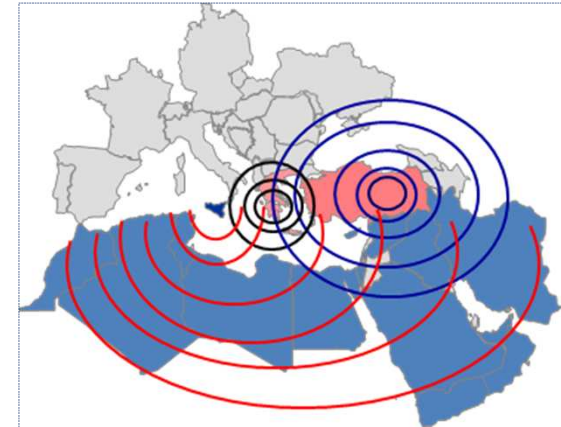
Focus on our Cloud Strategy



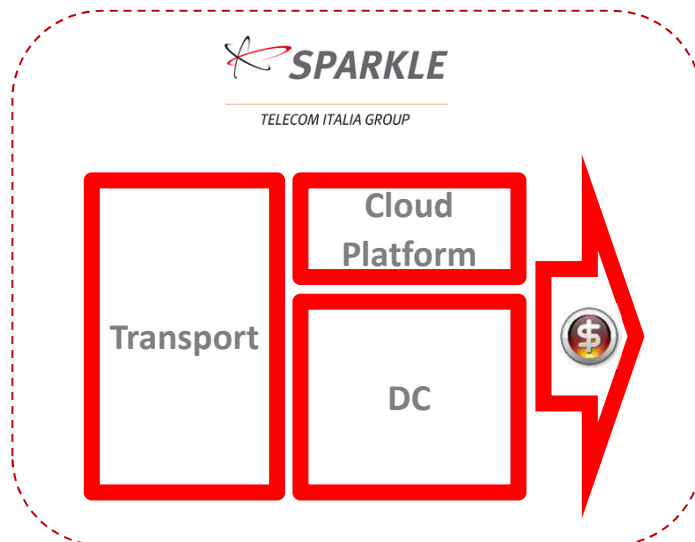
Leveraging its wholesale infrastructure and capabilities, Sparkle has developed a Cloud proposition in its Mediterranean strategic hubs

- **Sicily**: reinforcing Catania as IaaS/Disaster Recovery delivery point for regional customers
- **Turkey & Greece**: starting from existing assets (its backbone and own Datacenter) Sparkle is exporting TI “nuvola Italiana” platform to address business customers

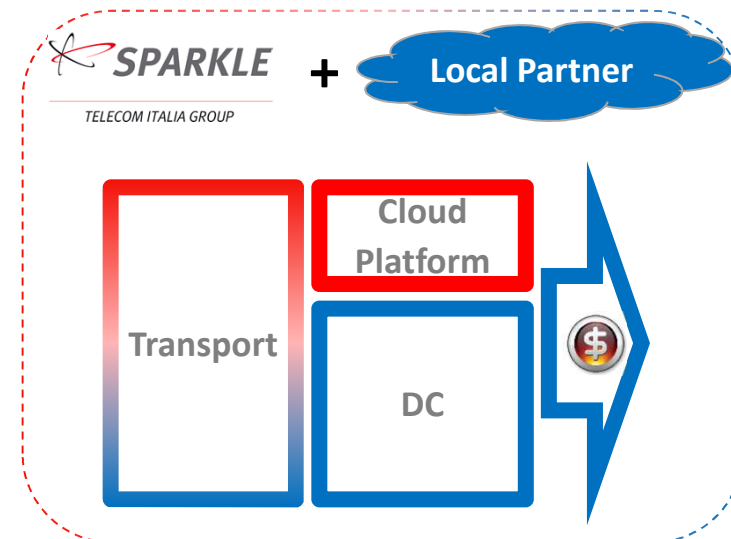
Sparkle is now looking for local partners in order to enlarge service offering in its existing POPs and to expand its operations in the Middle East region



Business Model Evolution



From a «make option» ...



... to a cooperative approach



www.tisparkle.com

