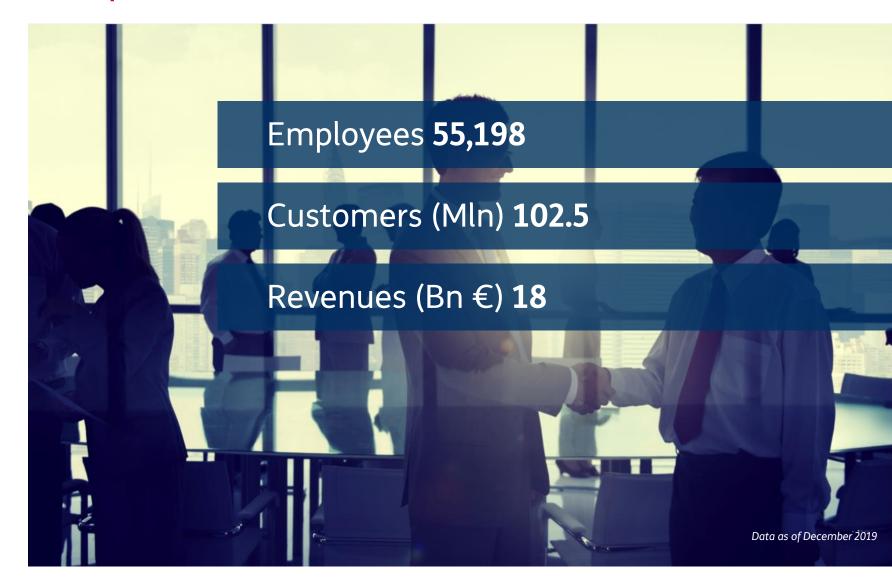


TIM Group Overview





TIM Group Overview





Sparkle Overview

Company data

Headcount

754

Countries of presence

34

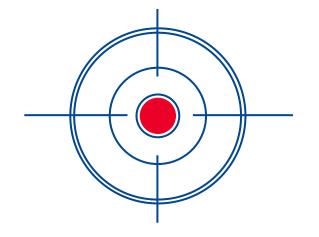
Network coverage*

#PoPs 159

PoPs via partners

> 1,000

Data as of December 2019 (*) Data as of April 2020



Key figures

Voice Traffic

10.3 Bn minutes

Revenues

ca. 1 Bn €

Data as of December 2019

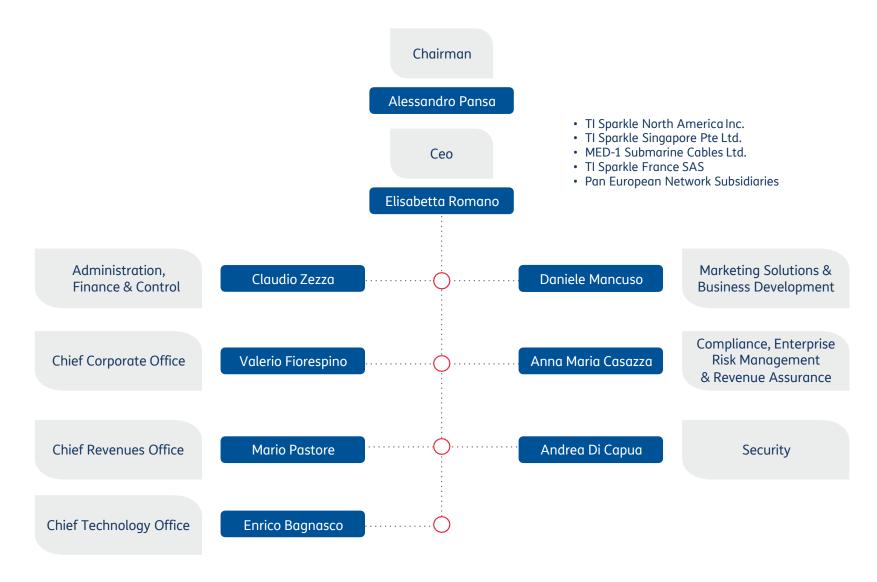


Sparkle Overview

- A LEADING GLOBAL OPERATOR with an unparalleled experience and know-how in a wide range of diverse markets. Sparkle, with its IP&Data, Cloud & Data Center, Corporate, Mobile and Voice Platforms, actively takes part in the development of worldwide communications, providing the best global connectivity solution to Fixed and Mobile Carriers, ISPs, OTTs, Media & Content Players, Application Service Providers and Multinational Corporations, before they know they need it
- Wholly owned subsidiary of TIM Group with the objective of developing the international wholesale and the retail multinational corporate businesses, as well as of supporting TIM Group business units for the provisioning of International Service

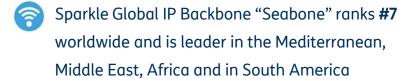


Sparkle Organization



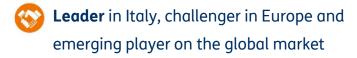


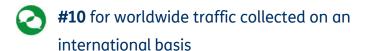
Sparkle Positioning





Cloud & Data Center Solutions available in several DCs worldwide, with key assets presence in Italy, Greece and Turkey











IP&Data Platform # 7 Globally

#1 in Middle East #1 in South America #2 in Africa #5 in Europe

IP WW Ranking

IP Global Ranking (Backbone)	March 2020
Telia Carrier	1^
Cogent Level 3	2^ 3^ 4^
NTT	5^
Tata Communications Sparkle	6^ 7^
Hurricane Electric Verizon Business	8^ 9^
PCCW Global	10^

(source: Ranking Renesys)



Voice Platform # 10 Globally

Int'l Voice traffic Ranking

Bn Min		2019
Vodafone CS	1^	55.6
Tata	2^	32
Orange	3^	30.5
Tofane	4^	30
IDT	5^	26
DT	6^	26
BICS	7^	24.3
Barthi	8^	21
Telefonica	9^	21
Sparkle	10^	10.3

(source: IMF-GTF)



Sparkle Key Assets



State-of-the-art Global Network with proprietary backbones in Europe, Mediterranean Basin and the Americas and ownership in submarine cables connecting Europe with South-East Asia and the Americas



Global Services Portfolio for Fixed and Mobile Operators, ISPs, OTTs, Media & Content Players, Application Service Providers and Multinational Corporations



Worldwide presence in 34 countries based on fully owned companies and offices

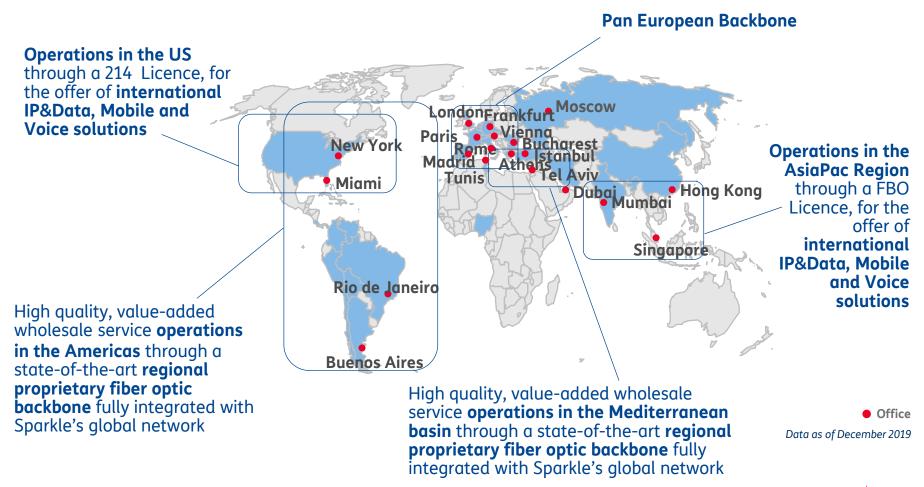


Advanced OSS, BSS and **Customer Care capabilities** with multi-lingual call center



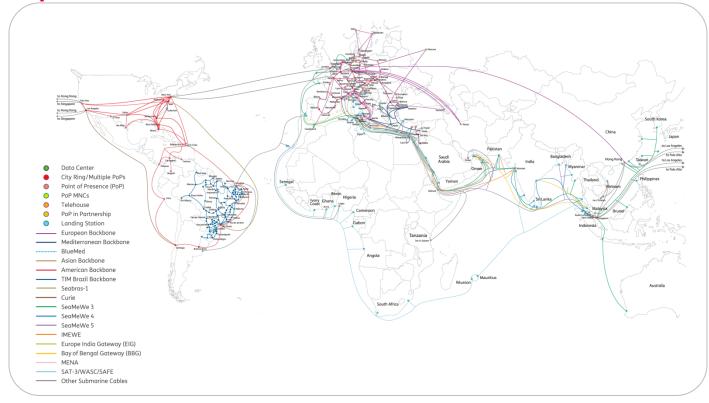
Sparkle Operations

Sparkle has a **global presence** based on its fully owned subsidiaries and offices in **34 countries**, with a headcount of over 700 in Italy and abroad





Sparkle Global Network



GLOBAL CAPABILITIES

- ▶ 86 cities in 44 countries
- ▶ 159 PoPs
- >1,000 PoPs through partners
- ▶ 41,000 km/fibre PEB
- ► 58,500 km Americas Backbone
- ▶ 11,000 km Mediterranean Backbone
- ▶ 18,000 km/fibre Italian network
- more than 433,000 km submarine cables*
- ca. 53,000 km other fibre network*

Data as of April 2020 (*) Includes Lease

- Full IP Global Network
- · Unique protected fiber path in Europe and global meshed architecture providing full resilience
- Unique footprint in Middle East and South East Asia through a state-of-the-art regional proprietary fiber optic backbone in the Mediterranean Basin, SeaMeWe-3, SeaMeWe-4, SeaMeWe-5, IMEWE and bilateral cable Systems
- New POPs in Italy, UK, US, Colombia, Brazil, Nigeria, Armenia, Jordan and Morocco
- Increased network capillarity in Europe
- New proprietary redundant backbone links from North to South America, new cable Seabras-1 connecting New York and Sao Paulo and new Fiber Pair on Google's Curie Submarine Cable to directly connect Chile to US
- · Capacity across the Atlantic and the Pacific



Sparkle Service Proposition

Complete set of IP, Data, Cloud & Data Center, Corporate, Mobile and Voice solutions for Fixed and Mobile Operators, ISPs, OTTs, Media & Content Players, Application Service Providers and Enterprises



A complete range of solutions designed to access any content on the Internet with secure global international IP connectivity, highperformance international bandwidth and IP MPLS services

SPARKLE CLOUD & DATA CENTER

Suite of highly flexible and scalable top class integrated IaaS, PaaS and SaaS that meets the ever growing need of cost efficient and top security IT solutions, available in several Data Centers worldwide, with proprietary key assets in Italy, Greece and Turkey



Complete portfolio of services, including global connectivity and ICT, aimed at serving the needs of corporate customers with the highest performance level

SPARKLE | MOBILE PLATFORM

A distinctive portfolio designed to support the operations of mobile operators to rapidly increase international mobile coverage and usage, generate new revenue streams and minimize service set up and management costs



Voice Solutions offer worldwide voice capabilities to Carriers, Service Providers and Mobile Operators combining network reliability, competitive pricing and excellent routing solutions



Sparkle Global Portfolio





YOU CONNECT AND TOGETHER WE EVOLVE

- SPARKLE Seabone
- **SPARKLE** | DDoS Protection Service
- SPARKLE | Virtual NAP

- SPARKLE | IXP Connect
- SPARKLE City2City
- SPARKLE Site2Site

- SPARKLE Ethernet Suite
- SPARKLE | Country2Country
- **SPARKLE** Restoration



SPARKLE CLOUD & DATA CENTER PLATFORM

YOU GROW AND TOGETHER WE EVOLVE

- SPARKLE | laaS Suite
- SPARKLE | Backup and Storage as a Service
- SPARKLE Disaster Recovery as a Service
- **SPARKLE** | Professional Services

- SPARKLE | MultiCloud Suite
- SPARKLE | YourCloudStore
- SPARKLE | Cloud Tailored Suite
- **SPARKLE** | Vertical Services

- SPARKLE | Sicily Hub
- **SPARKLE** Greece Data Centers
- **SPARKLE** | Turkey Data Centers
- SPARKLE | Miami Data Center
- SPARKLE | Global Data Center
- SPARKLE | Data Center Connect
- **SPARKLE** | Cloud Connect



SPARKLE CORPORATE PLATFORM

WE COLLABORATE AND TOGETHER WE EVOLVE

- SPARKLE Ethernet Suite
- SPARKLE | Carrier MPLS
- SPARKLE IP VPN Suite
- SPARKLE SD-WAN

- SPARKLE Global Connect
- SPARKLE Data Center Connect
- SPARKLE | Cloud Connect
- SPARKLE Bandwidth on Demand
- SPARKLE | Outsourcing Solutions
- SPARKLE | Communication Solutions
- SPARKLE | IoT Solutions

- SPARKLE | Media Solutions
- SPARKLE eHealth Solutions



SPARKLE MOBILE PLATFORM

YOU MOVE AND TOGETHER WE EVOLVE

- SPARKLE IPX
- SPARKLE GRX
- SPARKLE | Big Data

- SPARKLE | Global Signalling
- SPARKLE LTE Diameter Signalling
- SPARKLE | Signalling Protection Suite
- SPARKLE | SMS Transit
- SPARKLE SMS Booster
- SPARKLE | Voice & SMS Express
- **Sparkle** Outbound Roaming Solution
- **SPARKLE** | VoLTE Transit and Roaming





- SPARKLE Best Voice Transit
- SPARKLE W.A.V.E. Voice Outsourcing
- SPARKLE | IPX
- SPARKLE | High Definition Voice
- SPARKLE | Access Services
- SPARKLE | Barrier Antifraud Services
- SPARKLE | Voice & SMS Express

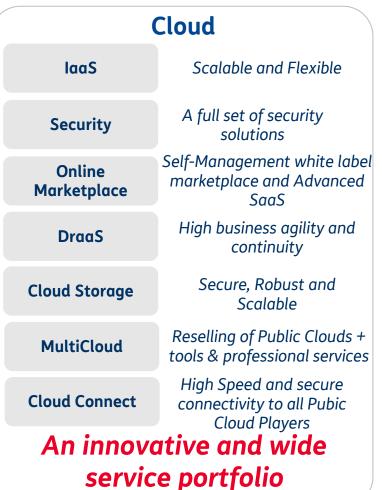


Cloud & Data Center Solutions

Data Center 6 DC Hubs Worldwide Colocation Located Best Technology in **Power** the Market Everything you need to be Cabling connected Colo 360° Data Center **Professional** Support **Services**

Advanced Data Centers to meet the requirements of Telcos and Enterprises





...and a unique Set of Cloud/Data Centers and Network Infrastructure

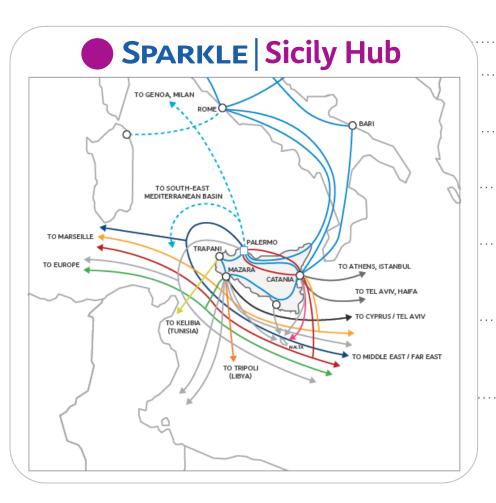
Colo and Hosting capabilities, completely integrated with Sparkle's network services worldwide

Regional Data Centers in **Italy, Greece and Turkey** that leverage on Sparkle's unique protected terrestrial and submarine network to Europe



Sicily Hub as Top Mediterranean Gateway to the Global Internet

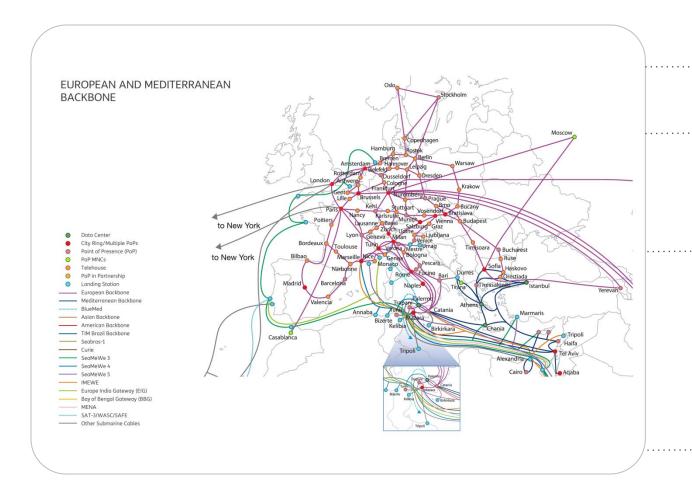
The leading IP gravity center in the Mediterranean where Content meets ISPs is in Palermo



- Neutral colocation facility
- Connected to all landing stations in Sicily, including SeaMeWe-5
- Private or Public Peering through DE-CIX, the world largest neutral IX
- Content, the most important players have chosen Sicily Hub to interconnect with ISPs
- Quality & Competitiveness, improved latency and lower costs than any other European location
- **Flexibility**, to efficiently manage submarine and terrestrial capacity with enhanced resilience
- Marketplace of multi-breed interconnected players to trade any telecommunication and cloud solutions



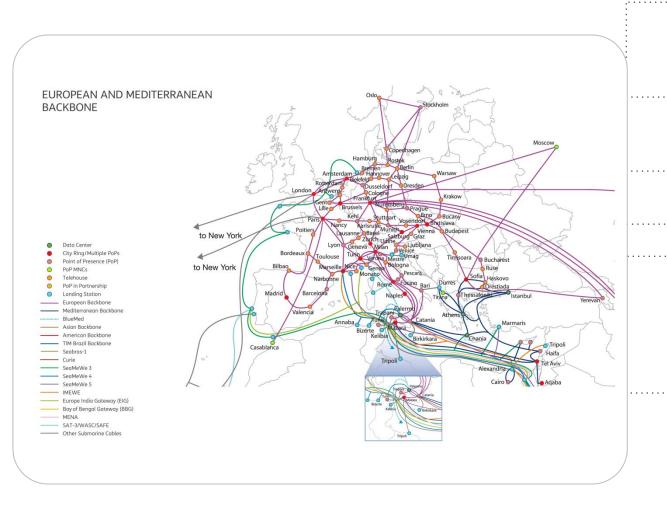
Focus on Key Regional Backbones: Europe & Mediterranean



- Increased network capillarity in Europe
- Unique protection from Istanbul to Europe through terrestrial and submarine networks
- New diversified and protected backbone links in the Balkans as alternative route to connect Europe to Africa, Middle and Far East
 - New POPs in Moscow and Casablanca for Corporate Solutions



Reinforcing Leadership in the Mediterranean through BlueMed....



- New cable to connect Palermo with Genoa's new open landing station, directly connected to Milan's rich digital ecosystem
- Multiple branches within the Tyrrhenian Sea to support further extensions southbound of Sicily
- Capacity up to 240 Tbps, Total length of 1,000 km
- Expected RFS 2020
 - BlueMed will provide advanced connectivity between Middle East, Africa, Asia and the Europe with up to 50% latency reduction than existing terrestrial cables connecting Sicily with Milan
 - Sparkle's new open landing station in Genoa is set to become the alternative priority access for other upcoming submarine cables looking for a diversified entry way to Europe, thus strengthening Italy's role as digital gateway between Africa, Middle East, Asia and Europe



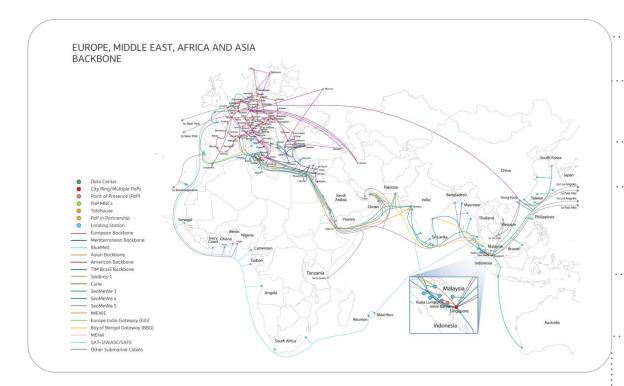
....and Nibble, the new Pan-Mediterranean Network



- New ultra-long-haul photonic backbone digitally linking Sicily with the major Points of Presence and datacenters in Europe
- Built upon new express fibers, Nibble will provide industry-leading speeds, low-latency, high-performance, scalable and guaranteed connectivity services between the most important European locations, meeting carriers and enterprises' rapidly increasing network capacity requirements
- Based on: DWDM & Instant Network technologies, Software-Defined Bandwidth solution and Instant Network
- Nibble will progressively be integrated with Sparkle's existing Mediterranean and Balkans Network and with BlueMed
- First link connecting Sparkle's Sicily Hub in Palermo with Milan Caldera open datacenter
- RFS: EoY 2020



Strategic Focus on Med, ME, Africa & APAC Corridors



- IMEWE reinforces Italy's role as main infrastructural Hub in the Mediterranean connecting Middle East and South-East Asia to Europe
- Through Sparkle's global network, operators in fast-growing markets of Middle East and Asia have access to worldwide contents with unrivalled performance through a 2-way path connecting Sparkle's Asian network to Europe and US, both East and Westbound

EUROPE & MEDITERRANEAN

- Fully resilient Pan European backbone covering 13 countries
- **State-of-the-art regional proprietary fiber optic backbone** covering: Italy,
 Turkey, Israel, Greece, Cyprus
- Proprietary submarine cable Athens-Istanbul
- Bilateral cables with Monaco, Albania, Croatia, Slovenia, Cyprus, Malta, Israel and Libya

EUROPE TO AFRICA, ME & ASIA

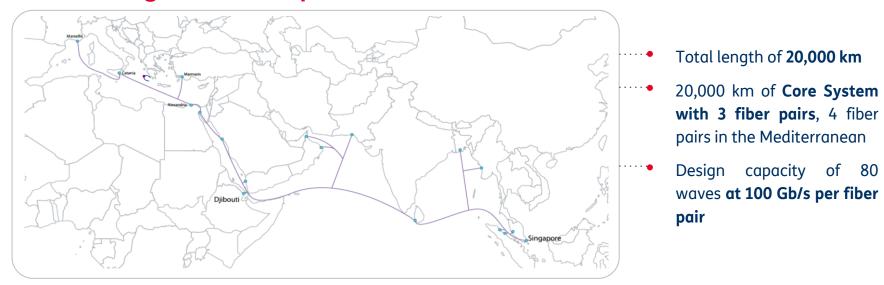
- SeaMeWe-4 cable: France, Algeria, Tunisia, Italy, Egypt, Saudi Arabia, India, South-East Asia
- **IMEWE** cable: France, Italy, Lebanon, Egypt, Saudi Arabia, United Arab Emirates, Pakistan, India
- Other Submarine Cables: **SeaMeWe-3**, **EIG, BBG** and **MENA** (Europe, Africa, Middle East, Far East)
- **SeaMeWe-5** cable: Europe to Asia with a main landing in Catania, Sicily

EUROPE TO WEST AFRICA & SOUTH AMERICA

SAT-3 (Europe, West Africa), ATLANTIS-2 (Europe, West Africa, South America)



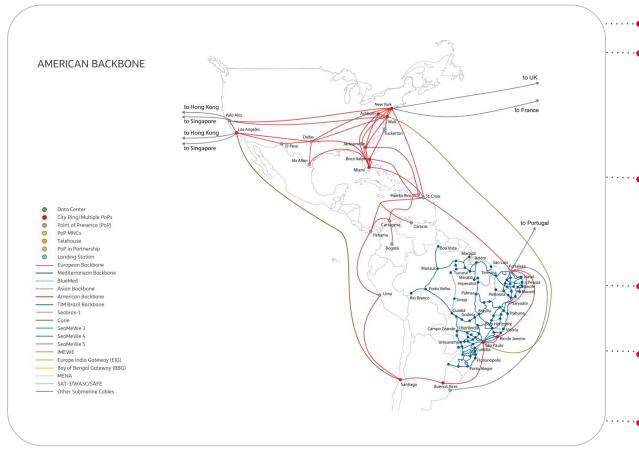
Reinforcing Leadership in the EU-Asia Corridor: SeaMeWe-5



- Sparkle is among initial investors for the implementation of the new submarine cable system connecting Europe to Singapore. Participated by 19 global players, SeaMeWe-5 connects Europe to Asia with main landing in Palermo and Catania, Sicily.
- The new cable system reaches 17 countries: Singapore, Malaysia, Indonesia, Myanmar, Bangladesh, Sri Lanka, Pakistan, Qatar, Oman, UAE, Yemen, Djibouti, Saudi Arabia, Egypt, Turkey, France and Italy
- Devised with the latest **100Gbps technology**, SeaMeWe-5 is a multiregional superhighway that provides lowest latency and represents an additional network layer of diversity and resilience for the heavily loaded Asia to Europe route
- Sparkle has been awarded both **Network Administrator (NA)** and **Network Operation Center (NOC)** responsibilities for SeaMeWe-5. Both activities are performed in **Sparkle's Core Landing Station in Catania**, which is also a **main landing point in Europe for SeaMeWe-5** as well as for other major international cable systems
- With the participation to SeaMeWe-5 **Sparkle enhances its customer proposition with a diversified and low latency route to and from Asia**, thus **further strengthening Sparkle's role as major cable landing hub in Europe and the Mediterranean**



Focus on Key Regional Backbones: Americas

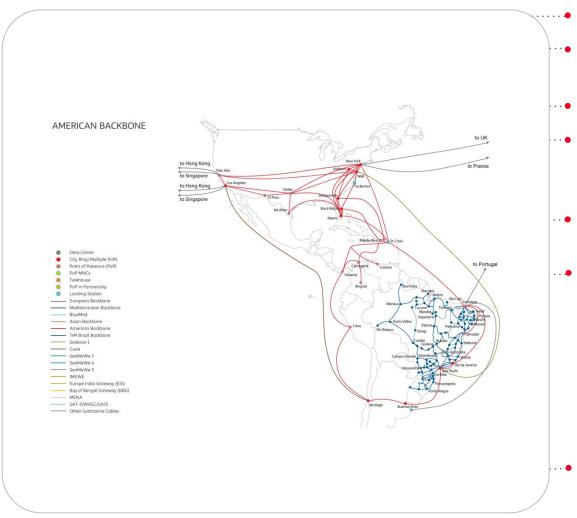


Full IP network in the Americas

- New Seabras-1 cable connecting New York and Sao Paulo and new Fiber Pair on Google's Curie Submarine Cable to directly connect Chile to US
- State-of-the-art proprietary fiber optic backbone in 8 countries: US, Argentina, Brazil, Chile, Colombia, Panama, Peru, Venezuela
- New proprietary redundant backbone links from North to South America
 - TIM Brasil Backbone fully integrated with Sparkle's global network
 - Capacity across the Atlantic and the Pacific



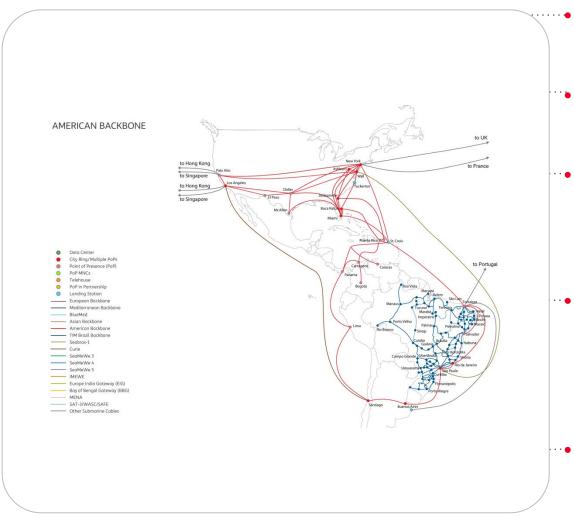
Reinforcing Leadership in the Americas through Seabras-1....



- First cable to connect Sao Paulo to New York
- Based on six fiber pairs and with initial design capacity of 72 Terabytes
- Sparkle owns 3 out of the 6 pairs
- Investment in a Branch Unit in Fortaleza, Brazil, and a protected backhaul between New York and Miami
- Full network resiliency with top service quality
- With Seabras-1 Sparkle supports the fast growing demand of capacity originating in South America, especially Brazil, along the South to North America route, one of the most relevant IP traffic streams globally which records yearly growth rates of over 35% and contributes over 30% of the global market value
- With the backhaul extensions from cable landing points to main PoPs in New York and Sao Paulo, Sparkle provides easy onward connectivity to rest of world



....and Curie Submarine Cable



- Sparkle Adds a **new fiber pair on Curie submarine cable system connecting Chile to US**
- The Google-owned subsea cable Curie is the first direct new generation US-Chile cable connecting Los Angeles to Valparaiso
- Sparkle's new fiber pair on Curie will be **fully** integrated with Sparkle's global backbone, increasing redundancy and offering a fourth diversified route to directly connect South and North America
- Thanks to these newest highways, Curie in the Pacific and Seabras-1 in the Atlantic, Sparkle offers the best performance in terms of latency and robustness through its pillar connectivity service City2City and its global Tier-1 IP transit service Seabone
- With this latest investment Sparkle is even more able to cater to the huge data demand driven by new technologies, media platforms and cloud-based services, requiring omnipresent internet connectivity



Our Plan: Assets and Priorities

3 Core Asset defining our competitive advantage

CUSTOMERS

INFRASTRUCTURES

PEOPLE

3 major priorities to be put in place to act upon





Global Satiro Training Program

- With a history of experience and know-how in a multitude of markets, Sparkle launched
 Global Satiro Training Program that provide the key competencies required to
 recognize, strategize and respond quickly and successfully to the ever-changing
 environment of the international telecommunications market, through a
 comprehensive range of learning and networking opportunity
- Global Satiro consists of two unique and far reaching in-class programs in collaboration with the TIM Group's HR Service. The program offers the knowledge required for an in-depth comprehension of the international telecoms market and of its dynamics, as well as all the skills to maximize the value of technology and optimize its overall contribution to the business
- The program features two different in-class training sessions to choose from, depending on the participant's area of interest, whether it be technical or commercial:
 - Technical Courses focus on advanced fixed and mobile Network Technologies,
 Services and New Applications
 - Commercial Courses focus on Business and Marketing Management of TLC Services



Global Partner

GP is a new line of business that offers structured capabilities to share TIM Group's key assets and competences with partners worldwide. Unlike traditional consulting firms, GP offers its extensive «hands on» know-how directly through highly skilled line managers and experts

PEOPLE	Extensive market, business and technical expertise, with multi-cultural approach
PROCESSES	Solid business processes throughout the value chain , constantly updated with best practices
PLATFORMS	In-house development & customization capabilities, leading to cost effectiveness
PORTFOLIO	Wide portfolio covering all customer segments

Our ICT line managers and experts:

- adopt a highly pragmatic approach, based on field experience
- are focused on delivering quick results allowing partners to resume work promptly
- deeply understand our partners' needs and speak their same "language"



Benefits

- Revenue increase
- Lower time-to-market
- Improved efficiency
- Better quality of service
- Innovation

Best option for explored topics



Sparkle Winner at the Global Carrier Awards 2019

Sparkle wins the **Best European Project** and **Best Social Media Campaign** prizes at the Global Carrier Awards. The awards follow the recognitions achieved by Sparkle in 2016, 2015 and 2013 for **Best Marketing**Campaign and in 2014 for **Best OTT Partnership** and **Best Latin American project**



The **Best European Project** award recognizes Sparkle's top-notch offer providing disaster recovery as-aservice (DRaaS) out of its data center in Catania, Sicily, in collaboration with Nutanix, world leader in enterprise cloud computing



The Best Social Media Campaign
award acknowledges the effectiveness
of the company's digital corporate
identity deployment and its renewed
digital communication strategy
resulting in a remarkable increase of
the follower base and engagement rate



Sparkle Winner at the InfoCom World Conference 2019

- Sparkle received the "Cloud Service of the Year" award at the InfoCom World Conference, the largest event for Telecom, IT and Media players in South East Europe
- The win follows the awards received by InfoCom in 2018 as Data Center of the Year and in 2017 as Best Cloud Service Provider as well as the prizes "Data Center of the Year" received at the Cloud and Green Awards in 2014 and 2013, recognizing Sparkle's leadership in the Cloud and Data Center business
- Sparkle operates in Greece through three proprietary data centers two in the Athens area (Metamorphosis and Koropi) and one in Crete - providing a full range of integrated ICT solutions
- Sparkle plans to expand its Cloud and Data Center business in Greece building new facilities and implementing the latest technology infrastructure: we are investing on the construction of a fourth data center in the area of Metamorphosis in Attica. The new building will offer 5500 sq. m. of colocation space and features the latest energy efficient technologies to provide customers with the most secure, sustainable and state-of-the-art technological environment for their mission-critical IT systems



Sparkle Winner at the Proof of Concept Showcases at MEF 2019

- Sparkle has been awarded with MEF PoC Award for the Service Assurance Implementation project "Dynamic Connectivity and Commerce Enabled by MEF 3.0 and Blockchain" at MEF19
- This win follow the recognitions achieved in the past years and confirm Sparkle's commitment and excellence in deploying forward-looking technologies and contributing to the definition of industry standards
- Sparkle won "Best MEF 3.0 Implementation Project 2018" and "Silver Proof of Concept" at MEF18
- The awards recognized Sparkle's ability to implement platforms for the automation and network programming, for the services orchestration and the commercial iterations management, using blockchain technology
- Best MEF 3.0 Implementation project 2018 awarded the longstanding project on "Fulfilment and Activation of an Intercontinental MEF 3.0 Service Spanning Four Operators" developed by Sparkle together with Amartus, ECI Telecom, Equinix, Liquid Telecom, Spirent, and Tata Communications with the objective to implement LSO (Lifecycle Service Orchestration) architecture and LSO APIs across multiple domains, testing processes and automation and virtualization platforms, for automated MEF 3.0 services in an intercontinental network context
- The Silver PoC Award has been assigned to Sparkle, as well as to service providers CBCcom, PCCW Global, Tata
 Communications and technology vendors Clear Blockchain Technologies and Cataworx, for the Proof of Concept on
 "MEF 3.0 LSO Federated Inter-carrier Data-on-demand Services through Automated Discovery and Blockchain
 Settlement" that showcased how telcos can introduce next-generation services in record speed, thanks to
 innovations in blockchain technology, artificial intelligence and intent-based customer interfaces



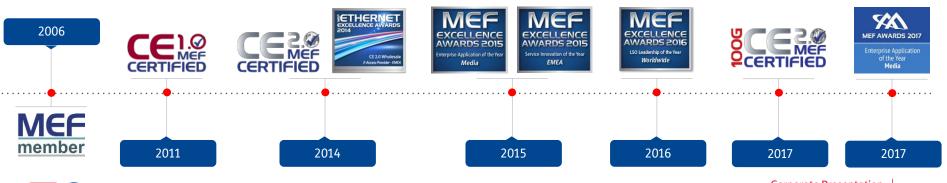




Sparkle Winner at the MEF Excellence Award 2017

Sparkle awarded with Best Enterprise Application of the year for Media

- The award recognizes the innovation of a new proposition developed in partnership with Aldea Solutions that provides high performance end-to-end permanent and occasional video services to Broadcasters, Content Providers and Final Diffusion Networks ensuring top performance and global coverage
- In 2016 Sparkle won the LSO leadership Worldwide awards. The award recognized the leading role of Sparkle in adopting MEF's concept of Lifecycle Service Orchestration (LSO) and implementing a new architecture that enables customers with an end-to-end management of the connectivity solutions purchased
- The first two innovative digital solutions introduced, **Data Center Interconnect** and **Secure Cloud Interconnect**, provide customers looking for more scalable bandwidth, capacity and intelligence, with the ability to distribute more efficiently the volume of traffic and transactional data among their own data centers and/or Cloud Provider premises
- These award follow the recognition as Best Service Innovation-EMEA and Best Enterprise Application-Media in 2015 and the recognition as Best CE 2.0 Wholesale E-Access Provider EMEA of the year and the Carrier Ethernet CE 2.0 Certification obtained in 2014 by Sparkle and Telecom Italia Group, the first Service Providers in Europe to achieve this Certification
- As further recognition of Sparkle's commitment in providing customers with best performing advanced connectivity solutions, in January 2017, Sparkle has obtained the MEF 100G Carrier Ethernet 2.0 Certification For E-Line (EPL & EVPL) Services. It is the first Service Providers in Europe to achieve this certification and the first worldwide Service Providers to become MEF 100G CE 2.0 certified for E-Line Services on a submarine cable system



Sparkle Winner at the Global Wholesale Excellence Voice Award 2017



Sparkle wins the Global Wholesale Excellence Voice Award at PTC 2017

- Sparkle has been awarded the **Global Wholesale Service Provider Excellence award for Voice Value in the Midsized category**. Sparkle received the important recognition from industry research and analysis firm Atlantic-ACM as a result of their Global Wholesale Report Card market research
- Sparkle has obtained the highest voice value score calculated by combining respondents' Quality and Price Competitiveness perceptions and considering international Wholesale Voice Services such as guaranteed quality Voice Termination, best efforts Voice Termination, Global Mobile Interconnection and IPX Services
- The awards follow the recognitions achieved by Sparkle in 2014 and 2013 as Best in Class in the Large Global Wholesale Service Provider category and the highest Global Wholesale Customer Experience touch points average among major carriers in 2010
- The ATLANTIC-ACM Global Wholesale Report Card is an independent, market-wide customer survey study of leading global wholesale providers. Nearly 400 respondents supplied around 1,400 individual carrier ratings, grading global wholesale service providers in categories that include numerous quality and price competitiveness categories for voice and data services in addition to provisioning, network performance, billing, customer service among others



Thank You

