

TOTEM

STAND TO SHARE, SHARE TO WIN

TOTEM CORPORATE PRESENTATION

Towers are the totems of our civilization, bringing people together to share their lives and create connections.

Towers are the totems of our time. As totem, we ensure that YOU, as mobile operators, businesses, institutions, landowners – everyone who has a vested interest in having effective towers – are treated fairly and are equally empowered.

Our towers are your towers. They gather diverse partners who all believe connectivity is elemental, partners who want a fair game with equal opportunities and common growth for all who play.

TOTEM, is a major actor of our society being as a key player in the connectivity ecosystem. We gather people to stay connected to each other thanks to our high-quality mobile infrastructures.

At TOTEM, we stand to share our assets – our infrastructures, our spaces, our knowledge, and our opportunities – to contribute to the common growth of a connected the world.

**YOU
ARE
TOTEM**

“Launched first in France and Spain, TOTEM has become a new player for regional development in Europe.

TOTEM creates value for all stakeholders - operators, landlords and real estate players, regional authorities, companies -, thanks to its connectivity solutions and equipment sharing.

TOTEM's teams relies on the excellence of its mobile infrastructure and a thorough understanding of its customers' needs to develop connectivity services everywhere, in both rural and urban locations.”



Nicolas ROY, CEO of TOTEM

November 2021

SUMMARY

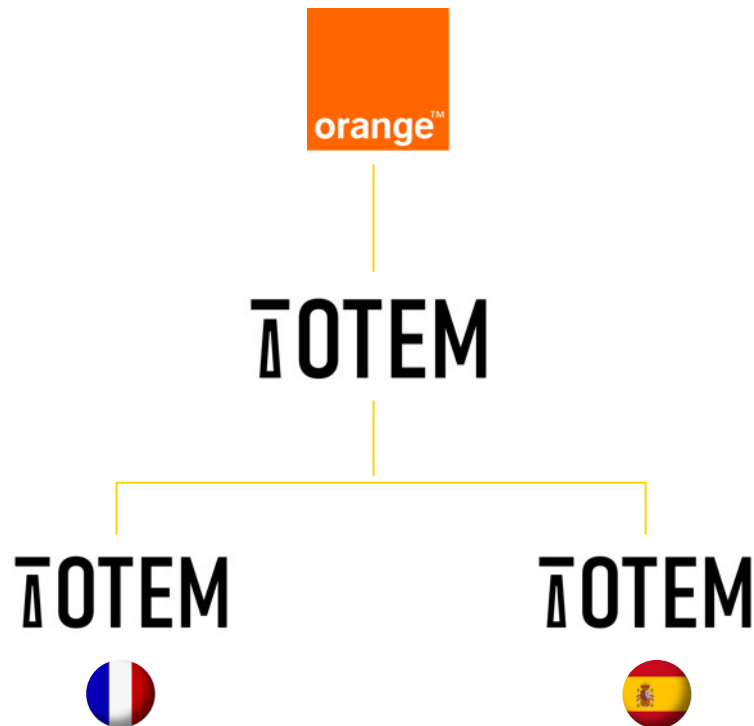
- 1. WE ARE THE TOWERCO YOU WERE WAITING FOR**
- 2. WE PROVIDE YOU THE BEST CONNECTIVITY SOLUTIONS**
- 3. WE STAND AS A LEADER IN EUROPE**
- 4. BECAUSE WE CARE, WE ARE COMMITTED**
- 5. WE ARE READY TO ANSWER YOUR NEEDS**



**1. WE ARE
THE TOWERCO
YOU WERE
WAITING FOR**

1. WE ARE THE TOWERCO YOU WERE WAITING FOR

BORN IN ORANGE, RAN INDEPENDENTLY



- TOTEM is a TowerCo resulting from the carve-out of **Orange's exceptional tower assets**.
- At TOTEM, we are operational since **November 2021** and aim at sharing with you our proven operational excellence across Europe.
- TOTEM acts independently from Orange. As a neutral host, we are proud to have full operational autonomy thanks to the transfer of all key passive mobile infrastructure assets (sites, towers, masts, land, leases and third-party tenancy contracts) and energy in Spain.
- TOTEM partners with **operators, local authorities, landlords and companies** to provide connectivity for everyone and everywhere.



1. WE ARE THE TOWERCO YOU WERE WAITING FOR

WE ARE THE 3.0 TOWERCO

We are the **long term industrial Towerco** and the **forerunner of the 3.0** Towerco generation.

FIRST GENERATION

Started in the United States in the 90's where TowerCos were real estate players supporting the growth of mobile networks.

SECOND GENERATION

Started in Europe in the 2000's, was very finance-oriented, investing on mobile infrastructure aiming while deleveraging operators.

THIRD GENERATION

Today, TowerCos are real pillar of the development strategy of MNOs. TOTEM is the best of the two world, being a strong real estate player & flexible financial partner, and a **trusted industrial provider**.



This is the story of a profound transformation of the telco market in which TowerCos are playing a key part.

1. WE ARE THE TOWERCO YOU WERE WAITING FOR

OUR **KEY** FIGURES SHOW OUR STRENGTH IN THE TOWERCO MARKET



+140 CLIENTS



26,990 SITES

TOTEM TRIBE

+170 EMPLOYEES



2 COUNTRIES



€328 MILLION TURNOVER H1
2022



+26,900 landlords



1. WE ARE THE TOWERCO YOU WERE WAITING FOR

WE MAKE CONNECTIVITY FOR EVERYONE, EVERYWHERE A REALITY



TOTEM REAL ESTATE MANAGMENT

Acquisition, long lease or to landlords to install and secure TOTEM infrastructures on parcels or buildings.



TOTEM INFRASTRUCTURES

TOTEM provides operators its passive infrastructures (ground-based towers, rooftops towers or shared antennas solutions for dense and enclosed areas) for colocations or, failing that, bespoke construction.



MOBILE NETWORK SERVICES

MNOs provide network & voice services to their end-customers allowing them to have access to the internet and other wireless services.

we secure



we built, install, maintain

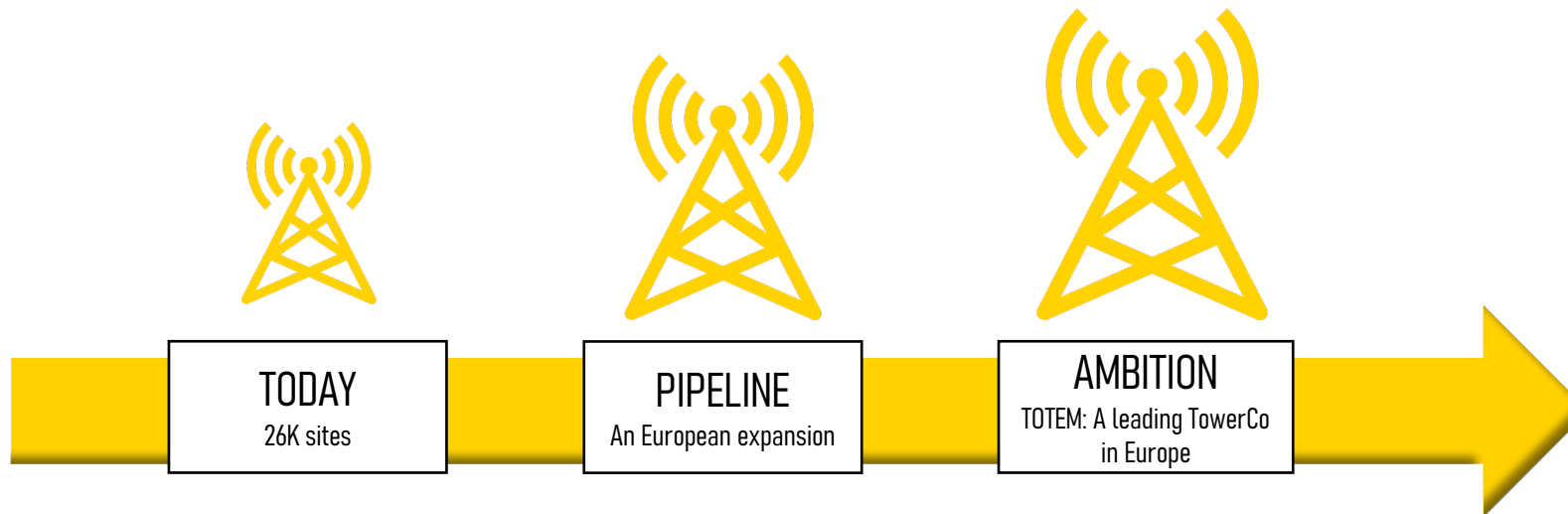


to allow operators to deploy and upgrade their network



1. WE ARE THE TOWERCO YOU WERE WAITING FOR

OUR GROWTH STRATEGY MAKES US A KEY CONNECTIVITY PLAYER IN EUROPE

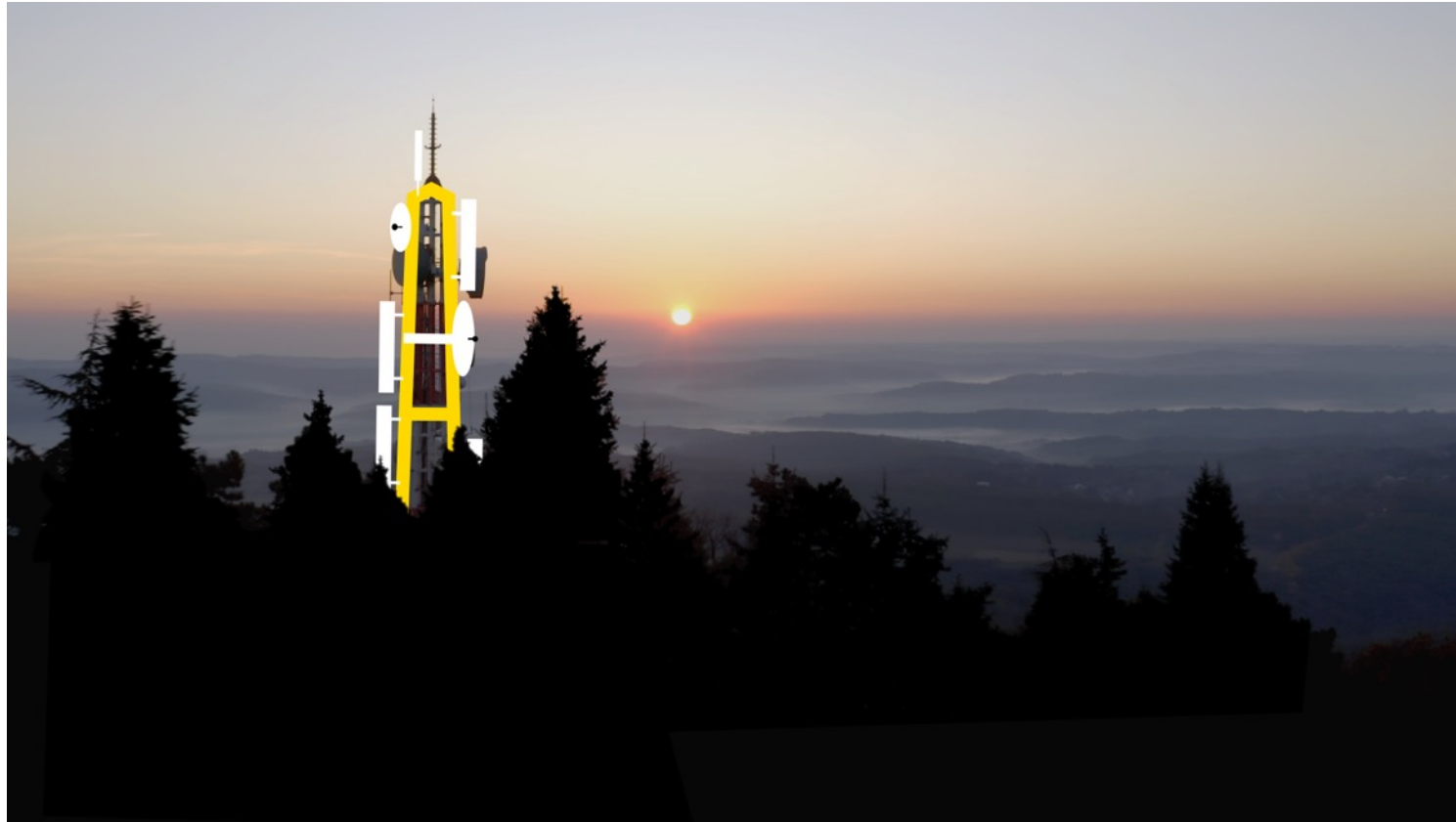


- Tenancy Growth >1.5x by 2026 in France and Spain
- Up to 3 000 new macro sites to be built by 2030
- Carve-out of potential additional sites from Orange footprint (up to 10k)
- Growth off-footprint via acquisitions and BTS programs



1. WE ARE THE TOWERCO YOU WERE WAITING FOR

OUR **CORPORATE** FILM : OUR TOWERS ARE YOUR TOWERS



TOTEM stands for towers - YouTube

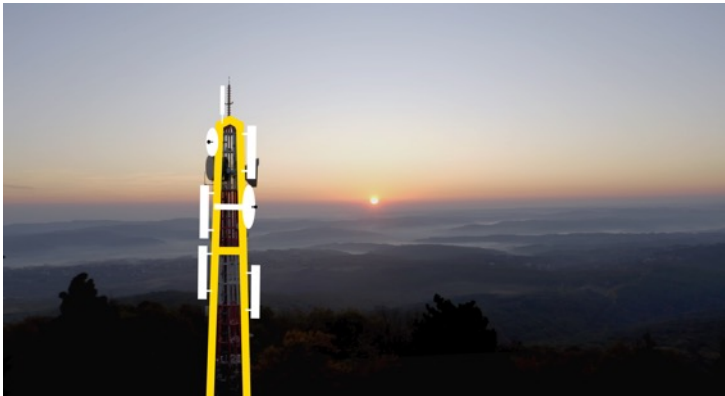


**2. WE PROVIDE
YOU THE BEST
CONNECTIVITY
SOLUTIONS**



2. WE PROVIDE YOU THE BEST CONNECTIVITY SOLUTIONS

TOTEM, A **KEY PLAYER** OF CONNECTIVITY IN EUROPE



WE DEPLOY FOR YOU

TOTEM deploys passive infrastructures solutions to allow everyone to be connected everywhere.



WE PROVIDE

TOTEM offers a range of high-quality infrastructures & solutions that support its clients in conquering new territories.



WE SUPPORT YOU

TOTEM is a privileged partner of operators, B2B actors, local authorities and landlords to propose shared infrastructure solutions.

2. WE PROVIDE YOU WITH THE BEST CONNECTIVITY SOLUTIONS

TOTEM has experience in **highly diverse market contexts** and can address challenges locally as needed



- Orange Group has **thorough and diverse experience** in a **high number of markets**: Western (Spain, France, Luxembourg, Belgium), Central (Poland, Slovakia) and Eastern Europe (Romania, Moldova) alongside emerging markets in Middle East and Africa
- TOTEM has a **deep understanding of communities, operators** and their needs: TOTEM provides mutualized solutions for operators with high attractivity, stability and long-term financial benefits
- TOTEM has **dedicated local teams for landlords** to make sure it provides clear contact points to manage relationships
- TOTEM will tap into **Buy In** (JV between Orange & DT) and **Orange Group Sourcing** to **leverage scale** and get best prices and terms from vendors



2. WE PROVIDE YOU WITH THE BEST CONNECTIVITY SOLUTIONS

OUR **HIGH-QUALITY INFRASTRUCTURE** SOLUTIONS : GROUND-BASED TOWERS

TOTEM is **re-inventing** and innovating the **TowerCo business model** with new setups and deployment types

Ground-based towers enable, in rural and urban areas, to reinforce and densify mobile transmission network.

TOTEM selects carefully its construction materials and its providers to guarantee MNOs assets integrity.



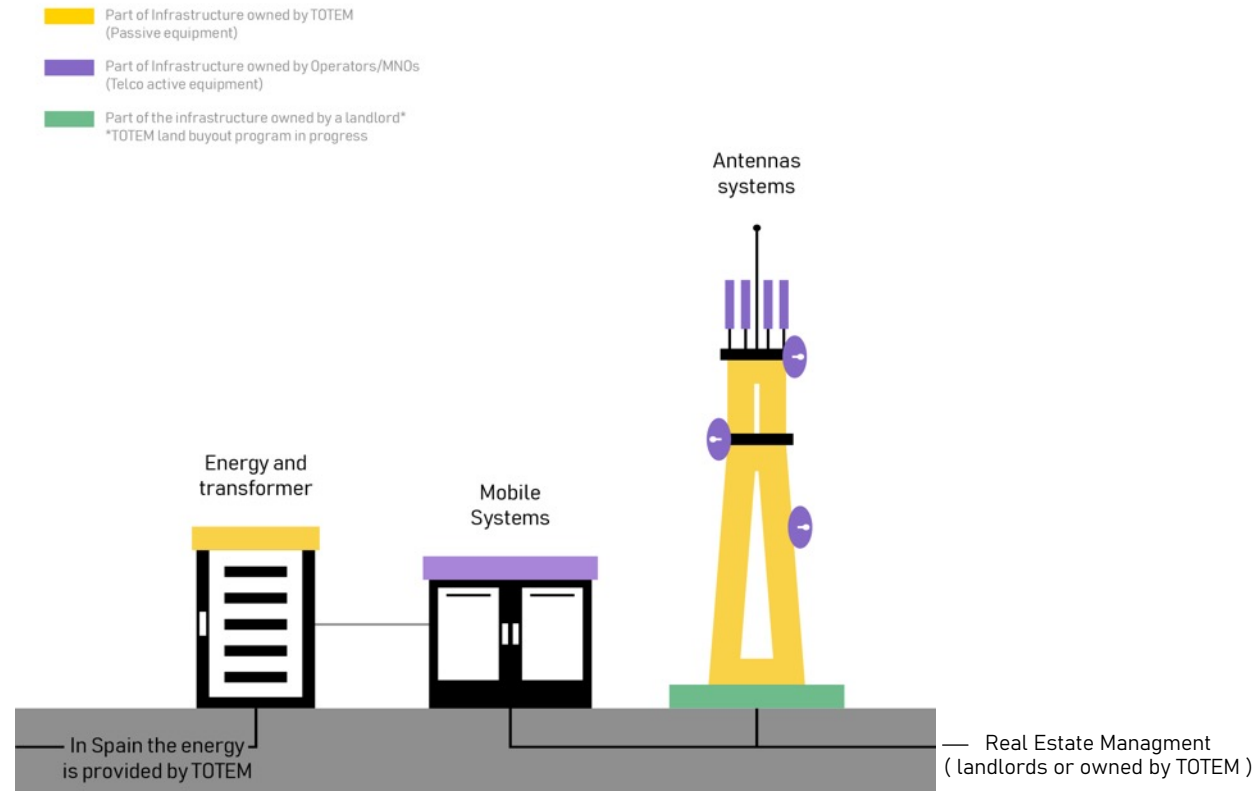
Most of TOTEM's towers are already connected in optic fiber which enable your end-customers to benefit of a high-speed network. We answer the connectivity needs of our customers.

TOTEM deploys high-quality infrastructure to help operators and B2Bs deploying 4G and 5G.

2. WE PROVIDE YOU WITH THE BEST CONNECTIVITY SOLUTIONS

OUR HIGH-QUALITY INFRASTRUCTURE SOLUTIONS : GROUND-BASED TOWERS

TOTEM and all the **operators** work as a **team** in the connectivity ecosystem



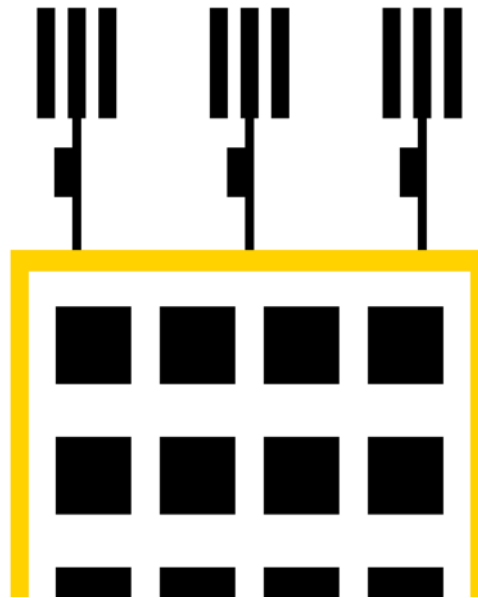
2. WE PROVIDE YOU WITH THE BEST CONNECTIVITY SOLUTIONS

OUR HIGH-QUALITY INFRASTRUCTURE SOLUTIONS : ROOFTOP TOWERS

TOTEM **rooftop towers** allow to **cover** urban / dense areas

Rooftop towers can address network densification bandwidth and indoor quality purposes, within a specific limited geographic.

Rooftop towers, like ground-based towers, can be available for bespoke cellular tower, small cells and micro-cell installations.



Rooftop towers are a good alternative in areas where ground-based towers cannot be built where the demand for mobile coverage is high.

Our technical experts define with you the best available site to ensure the best coverage possible.



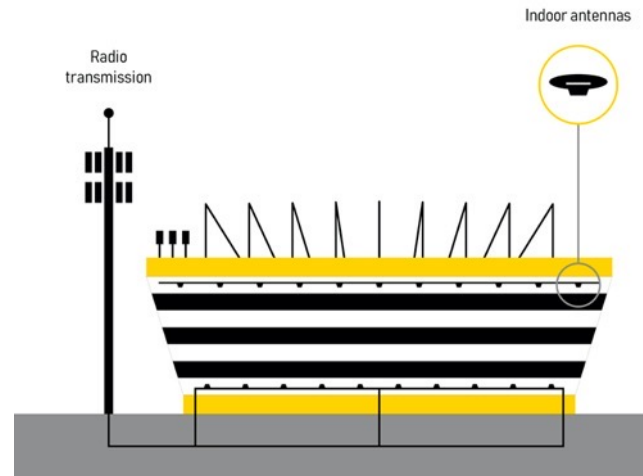
2. WE PROVIDE YOU WITH THE BEST CONNECTIVITY SOLUTIONS

OUR **HIGH-QUALITY INFRASTRUCTURE SOLUTIONS** : DISTRIBUTED ANTENNA SYSTEMS

With DAS, TOTEM **meets the challenges** of covering closed indoor venues

Distributed Antenna Solutions, or DAS systems, are used to fill coverage gaps in underserved areas where additional macro sites would be inadequate.

DAS allow you to stay connected in closed and dense areas.



They are often set up in used in venues, exhibition centers, transport areas and hot spots, enabling 4G, 5G and IoT.

DAS can aggregate several frequency bands of several technologies.

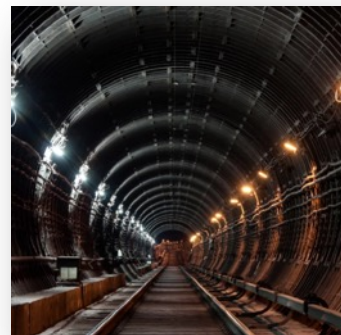
2. WE PROVIDE YOU WITH THE BEST CONNECTIVITY SOLUTIONS

OUR **HIGH-QUALITY INFRASTRUCTURE** SOLUTIONS : DISTRIBUTED ANTENNA SYSTEMS

TOTEM **deploys DAS** infrastructures in all types of **closed and dense** areas



Theatre



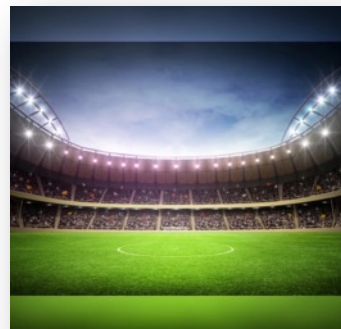
Transportation



Concerts



Shopping centers



Stadiums



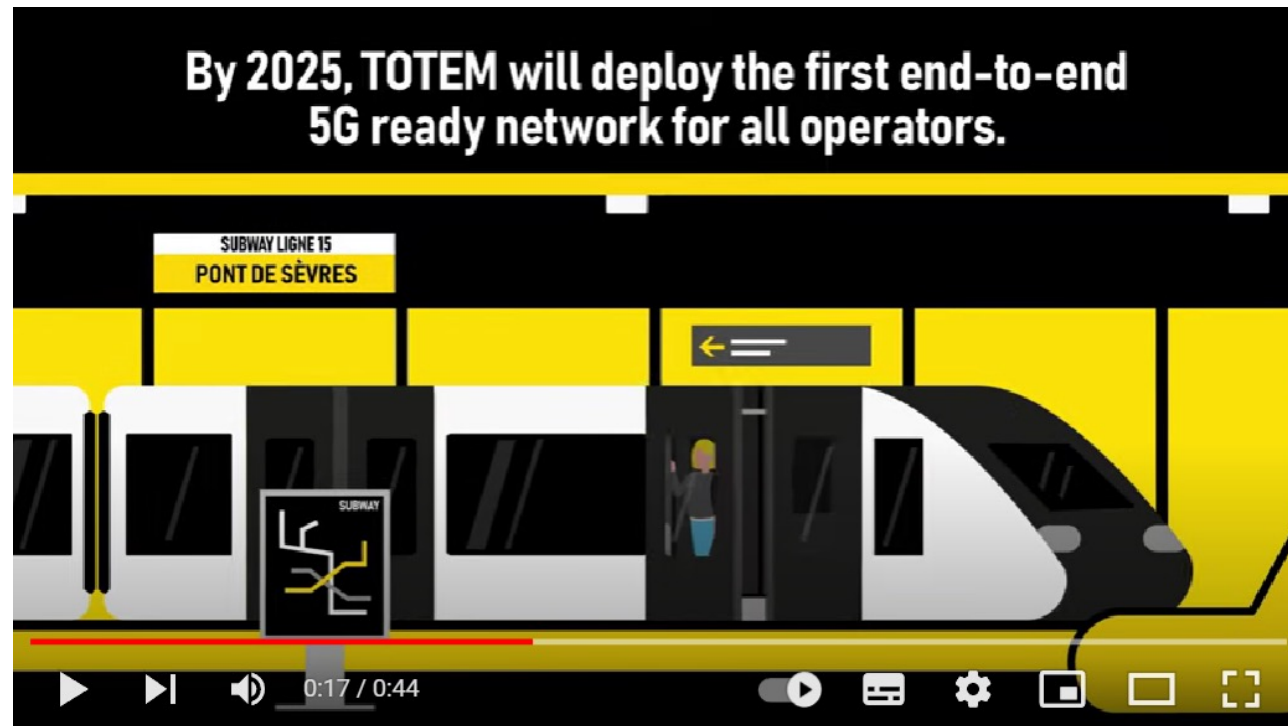
Offices



2. WE PROVIDE YOU WITH THE BEST CONNECTIVITY SOLUTIONS

OUR **HIGH-QUALITY INFRASTRUCTURE** SOLUTIONS : DISTRIBUTED ANTENNA SYSTEMS

TOTEM will deploy the **5G mobile network coverage** of the future **line 15 South** of the Grand Paris Express



TOTEM will provide mobile coverage for the forthcoming 15 South line of the Grand Paris Express. - YouTube

2. WE PROVIDE YOU WITH THE BEST CONNECTIVITY SOLUTIONS

THEY SPEAK ABOUT OUR EXPERTISE



La Ligne 15 Sud du métro parisien aura la 5G

Par Elsa Bembaron

Publié le 30/05/2022 à 18:36, mis à jour le 30/05/2022 à 18:36



Le Monde

Les futurs métros du Grand Paris auront la 5G

La ligne 15, dont la mise en service est prévue pour la fin 2025, sera le premier métro européen entièrement équipé de cette technologie.

Par Olivier Pinaud

Publié le 01 juin 2022 à 06h49 - Mis à jour le 01 juin 2022 à 11h13 - Lecture 1 min.



Les Echos

Le métro parisien va se doter des premières lignes 100 % couvertes en 5G d'Europe



2. WE PROVIDE YOU WITH THE BEST CONNECTIVITY SOLUTIONS

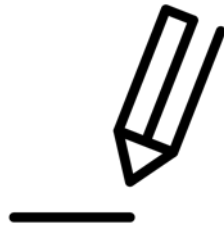
OUR UNIQUE **CUSTOMER-ORIENTED** APPROACH TO ANSWER YOUR NEEDS

TOTEM offers you a **partnership that is end-to-end** and goes beyond in **5 steps**:



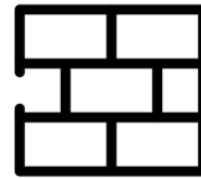
1. Planning

- With the company dedicated team
- Reviewing their specific needs (colocation, built-to-suit, bespoke infrastructure...)



2. Designing

- Reviewing the proposal
- Pre-build demonstration
- The approval of the customer



3. Building

- Construction
- Final GO approval



4. Monitoring

- Operations & maintenance
- Modernization
- Site check-ups



5. Improving

- Measuring
- Reporting
- Strengthening



2. WE PROVIDE YOU WITH THE BEST CONNECTIVITY SOLUTIONS

WE VALUE OUR TRUSTWORTHY **RELATIONSHIP** WITH OUR LANDLORDS

TOTEM helps landlords create **more value** for their assets.

COMMERCIALISATION

TOTEM makes it possible to increase the visibility of landlords' sites through its strategic partnerships and commercial relations with telecommunications providers.

EXPERTISE

At TOTEM we are proud of our trustworthy relationship with landlords. Our dedicated experts, are here to answer the landlords' needs and help them valorize their assets.

MAINTENANCE

TOTEM oversees all the steps of towers' installation and maintenance, making of security and regulatory compliance the highest priorities. We consider the landlord's building aesthetic to provide the best solutions possible. TOTEM also secures its sites with reliable innovative solutions, such as digital key solution.

SERVICES

TOTEM offers, as an option, the following management services:

- Specific legal expertise
- Support for the management of the life of the contract
- An urban planning council
- Competitive intelligence
- Pro-billing
- Management of stakeholder access. TOTEM proposes to include its exclusive free access management service

2. WE PROVIDE YOU WITH THE BEST CONNECTIVITY SOLUTIONS



10 REASONS WHY YOU SHOULD CHOOSE US

TOTEM is here to **support you** in all your connectivity projects.

1

You can rely on TOTEM

for a long-term and stable cooperation for 15+ years with transparent terms

2

TOTEM is flexible on financing and adheres to best-in-class MSA practices

You and TOTEM can define the optimal deal to achieve mutual financial objectives

3

TOTEM is experienced in managing all site topologies

TOTEM can be the end-to-end provider for mobile passive infrastructure for all sites – towers, rooftops, shared or non-shared

4

Flexible operating model

From passive sharing to end-to-end tower management model, we can adapt to your needs

5

You as top and sole priority

TOTEM as a new entrant is fully dedicated to prioritize your success, unlike existing players who have prioritization of their existing anchor tenants

2. WE PROVIDE YOU WITH THE BEST CONNECTIVITY SOLUTIONS



10 REASONS WHY YOU SHOULD CHOOSE US

TOTEM is here to **support you** in all your connectivity projects.

6

Flexible format of infrastructures

Our infrastructures are adapted for you : rooftops, greenfield or indoor sites

7

Strong technical assistance

We have in-house capacity to deliver new build to suit program, bespoke solutions, and deploy indoor coverage projects

8

Broad range of additional services

On top of our high-quality infrastructures, we provide you energy and backhaul solutions, network or antenna as-a-service solutions, and connectivity along transport routes...

9

Network optimization support

We accompany all operators in France and Spain to deploy faster 5G everywhere they want

10

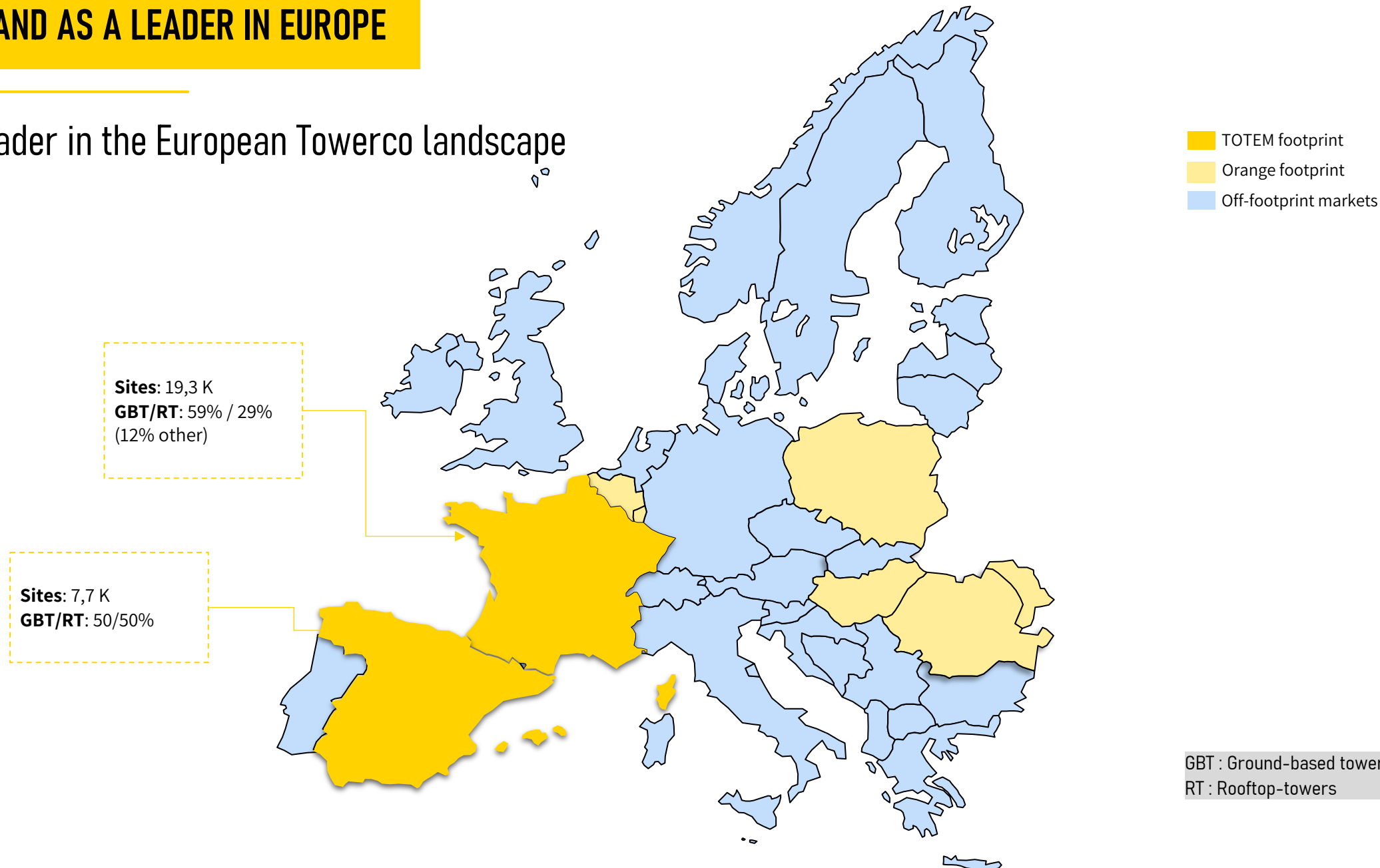
TOTEM is a neutral TowerCo

TOTEM works with all MNOs as an independent and neutral TOWERCOs - from an operational point of view to a financial point of view

3. WE STAND AS A LEADER IN EUROPE

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A new leader in the European Towerco landscape



3. WE STAND AS A LEADER IN EUROPE

A new leader in the European Towerco landscape

TOTEM France

KEY FIGURES

- TOTEM France: nearly 20,000 sites with a mix of 59% ground-based towers, 29% rooftops and 12% other locations
- More than 120 employees
- +100 clients



"TOTEM supports its customers from end-to-end, proposing the most suitable connectivity solutions and positioning itself as the essential actor for deploying 5G . On top of our core activities, indoor connectivity is a new priority not just for companies and real estate actors, but also for the entertainment and transport sectors"

Thierry Papin, CEO of TOTEM France



3. WE STAND AS A LEADER IN EUROPE

A new leader in the European Towerco landscape

TOTEM Spain

KEY FIGURES

- TOTEM Spain: nearly 7,700 macro-sites, 50/50 divided between ground-based towers and rooftop towers
- More than 50 employees
- TOTEM serves the largest mobile challenger, provides a platform for the fourth MNO entrant and facilitates network sharing between Orange and Vodafone



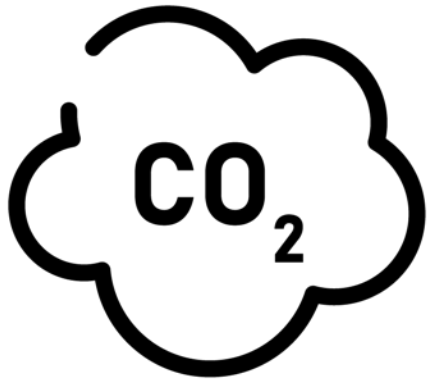
"While we currently have a particularly strong presence in urban areas where economic activity has developed in Spain, TOTEM intends to extend its connectivity offering to the whole country. Whether in towns or rural areas, TOTEM provides the best connectivity and facilitates the deployment for operators, in closed cooperation with local and regional authorities, economic hubs, and companies."

Patrick Farges, CEO of TOTEM Spain

**4. BECAUSE
WE CARE
WE ARE COMMITTED**

4. BECAUSE WE CARE, WE ARE COMMITED

AT TOTEM, WE ARE HIGHLY ENGAGED TO LIMIT OUR **IMPACT ON THE ENVIRONMENT** BY REDUCING OUR CARBON EMISSIONS



- TOTEM is convinced that it is by pooling and designing infrastructure networks responsibly that we can **optimize our growth and limit our impact to the environment**
- **Strong commitment to the use of sustainable energy sources:**
 - Working towards being **carbon-free at company level and sourcing renewable energy**
 - Already in Spain: TOTEM provides on-grid energy, the **100%** of which comes from **renewables**

TOTEM, A **KEY PLAYER** OF CONNECTIVITY IN EUROPE



We are the industrial partner the operators were expecting



Our unique know-how makes us the most trustworthy TowerCo partner



At TOTEM we support the growing connectivity needs in Europe



At TOTEM we share growth with all our stakeholders to build together tomorrow's connected society


GET IN TOUCH WITH US



▶ Henryk Dyjas

 Vice President Business Development

 henryk.dyjas@totemtowers.com

 +33 7 88 76 60 19

+48 602 55 99 00

FOLLOW US

 totemtowers.com

 <https://www.linkedin.com/company/totemtowers/>

TOTEM

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