



# Deutsche Telekom Company presentation

2024



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In addition to figures prepared in accordance with IFRS, Deutsche Telekom also presents alternative performance measures, including, among others, EBITDA, EBITDA margin, adjusted EBITDA, adjusted EBITDA after leases, adjusted EBITDA margin, adjusted Core EBITDA, adjusted EBIT, adjusted net income, free cash flow, free cash flow after leases, gross debt, net debt after leases, and net debt. These alternative performance measures should be considered in addition to, but not as a substitute for, the information prepared in accordance with IFRS. Alternative performance measures are not subject to IFRS or any other generally accepted accounting principles. Other companies may define these terms in different ways.

# Company presentation

**01 Profile**

02 Strategy & Transformation

03 Network, Products & Innovation

04 Service & Brand

# Our keyfacts

**25.4** mn  
fixed-network lines

**199,652**  
employees worldwide\*

€ **112.0** bn  
revenue in 2023

**22.0** mn  
broadband customers

**252.2** mn  
mobile customers

Figures based on annual report 2023.  
\* Reporting date December 31, 2023

# Deutsche Telekom Profile



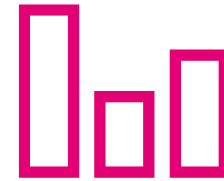
## Customers

- **252.2 mn** mobile customers
- **25.4 mn** fixed-network lines
- **22.0 mn** broadband customers
- Approx. **8.6 mn** TV customers



## Markets

- Present in > 50 countries
- **Germany, Europe and the USA:** with own infrastructure
- **T-Systems:** global presence & alliances via partners



## Numbers

- Revenue **€ 112.0 bn**
- Adjusted EBITDA AL **€ 40.5 bn**
- Free Cashflow AL **€ 16.1 bn**



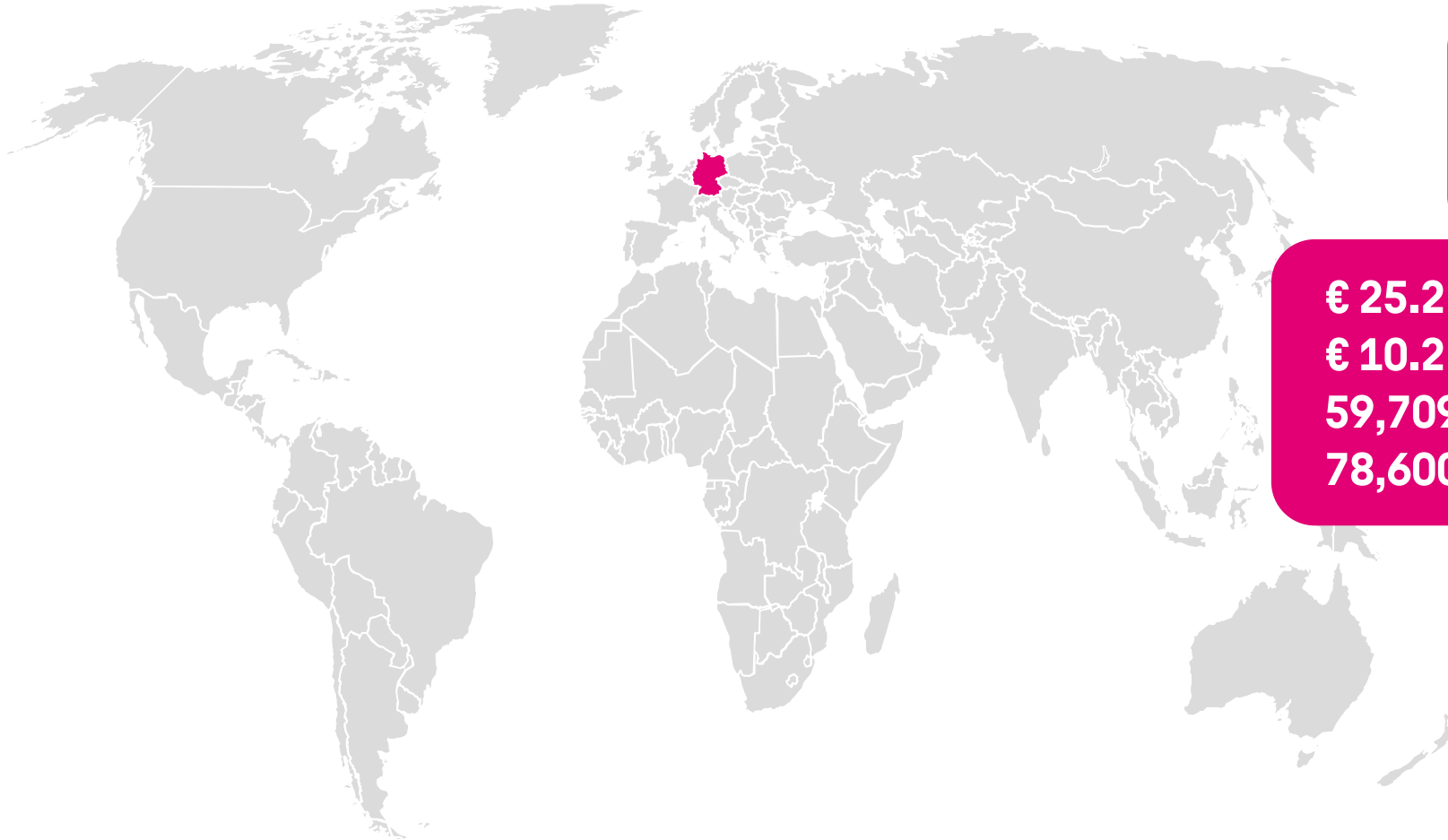
## Employees & responsibility

- Employees worldwide: **199,652** (Reporting date Dec. 31, 2023)
- **4,908** trainees and cooperative degree students
- Pioneer of social issues (climate protection, data privacy, diversity, etc.)

Figures based on annual report 2023.

# Germany

## Facts & figures



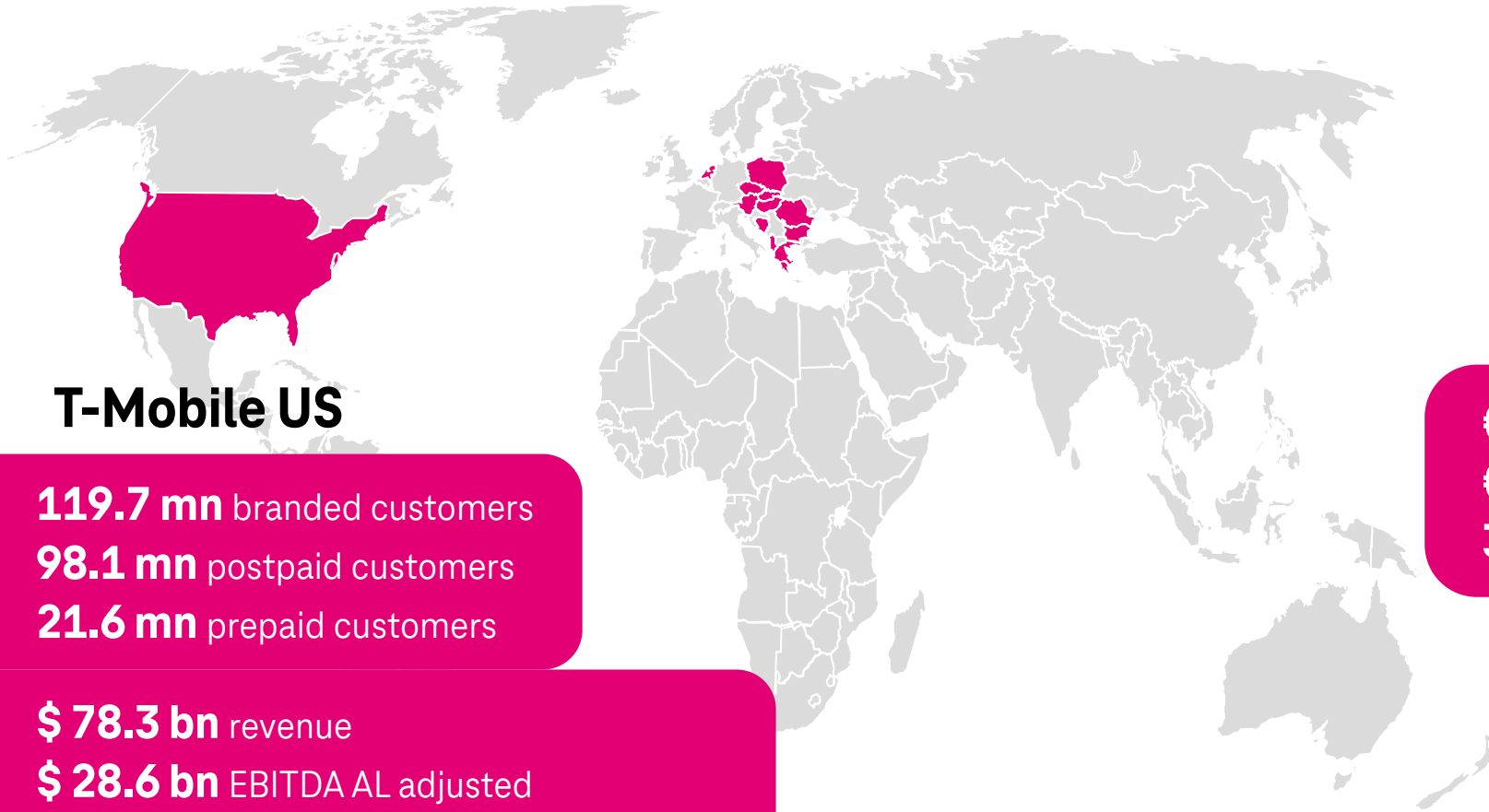
**61.4 mn** mobile customers  
**15.0 mn** broadband customers  
**4.3 mn** IPTV customers incl. satellite

**€ 25.2 bn** revenue  
**€ 10.2 bn** EBITDA AL adjusted  
**59,709** employees (Reporting date Dec. 31, 2023)  
**78,600** employees in Germany overall (Dec. 31, 2023)

Figures based on annual report 2023.

# United States & Europe

Facts & figures



## T-Mobile US

**119.7 mn** branded customers  
**98.1 mn** postpaid customers  
**21.6 mn** prepaid customers

**\$ 78.3 bn** revenue  
**\$ 28.6 bn** EBITDA AL adjusted  
**62,677** employees (Reporting date Dec. 31, 2023)

## Europe

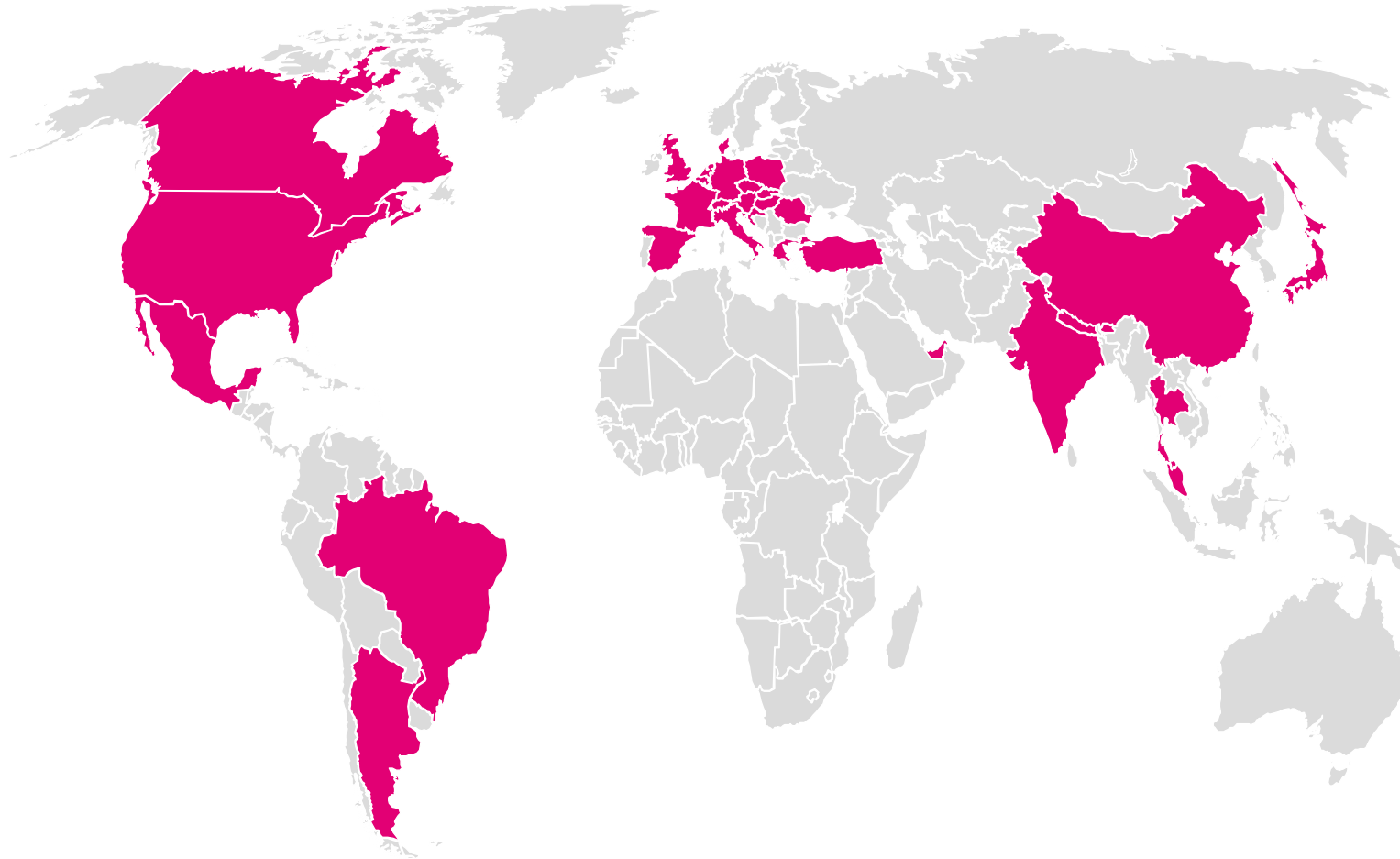
**47.9 mn** mobile customers  
**7.0 mn** broadband customers  
**4.3 mn** IPTV, satellite, cable customers

**€ 11.8 bn** revenue  
**€ 4.1 bn** EBITDA AL adjusted  
**32,932** employees (Reporting date Dec. 31, 2023)

Figures based on annual report 2023.

# T-Systems

Facts & figures



€ 3.9 bn revenue

€ 0.3 bn EBITDA AL adjusted

26,036 employees (Reporting date Dec. 31, 2023)

Information technology and telecommunications

**services in all industries:**

automotive, finance, transport, retail & public sector

**Pioneer in cloud computing**

Corporate customers, multinational corporations & public sector

Figures based on annual report 2023.



# Most valuable german brand of all time



**MOST VALUABLE  
GERMAN BRAND  
OF ALL TIME**

**GLOBAL  
TOP 10**

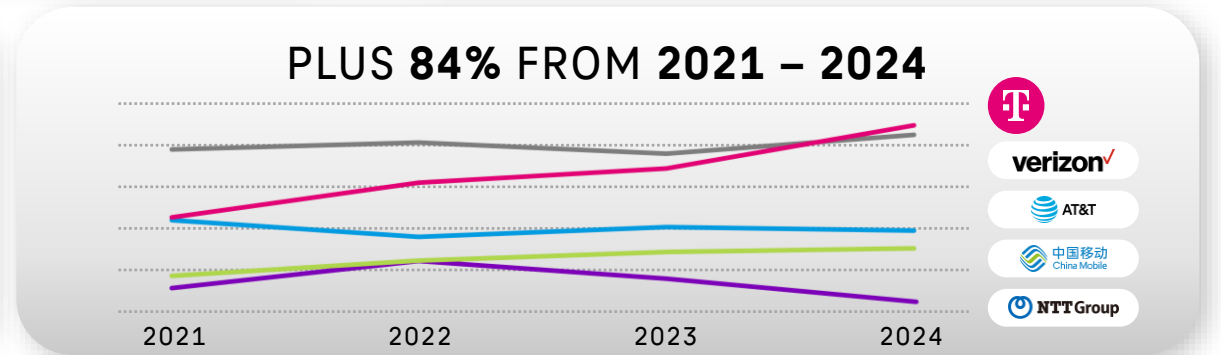
**#9 OF THE  
MOST VALUABLE  
GLOBAL BRANDS**

**#1**

**MOST VALUABLE  
TELECOMS BRAND  
IN THE WORLD**

INCREASE BRAND VALUE OF **17%** UP TO

**\$ 73.3 BILLION**



Source: Brand Finance Global 500 - 2024

# We take responsibility

Corporate Responsibility

#GREEN  
MAGENTA



## Sustainability



### Environmental and climate protection

e.g., CO<sub>2</sub> reduction, efficient use of resources, circular economy, sustainable mobility



### Sustainable innovations and products

e.g., environmentally friendly and accessible products, efficient data center, e-health



### Sustainable supplier management

e.g., binding requirements for the supply chain, reviews and audits



### Strategic management, governance, stakeholder management and sustainable finance

e.g., mandatory CR policies, KPIs for the entire Group in the annual and CR reports, sustainability indexes

## Groundbreaking projects

### Group-wide climate protection target:

100% of Group's electricity from renewable energy sources since 2021. **Net zero:** In own operations by 2025/entire value chain by 2040

### #GoodMagenta & #GreenMagenta:

Own labelling for Group's sustainable products, services and social initiatives (awarding of the contract validated by TÜV).

### Supplier selection and development:

Sustainability as a key criterion

### Success in respected rating indexes and rankings:

S&P CSA, oekom, CDP, MSCI and Sustainalytics, among others

# We take responsibility

Corporate Responsibility

#GOOD  
MAGENTA

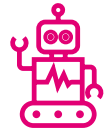


## Social commitment



### Digital Participation

Connection of media and democratic literacy



### Digital Responsibility

Impact of Digitization: minimizing risks, optimizing opportunities



### Digital Education

Offers for internet connections and equipment of schools.



### Deutsche Telekom Stiftung

Enabler for education ecosystem for mathematics, science and technology

## Groundbreaking projects



### “Media, sure! But secure.”:

#TAKEPART – No hate speech, offers promoting competent use of media among 9- to 99-year-olds



### AI-Guidelines

Digital ethics policy for governing the use of Artificial Intelligence (AI)



### Telekom@School

Subsidized internet access for all general and vocational schools throughout Germany



### Educational foundation

projects for young people between the ages of ten and 16, e.g. “Yes I can!” project promoting media literacy

# We take responsibility

Corporate Responsibility

## Diversity, Equality and Inclusion



### Leading role in societal and diversity-related issues

- Pioneer as first to introduce Group-wide women's quota
- Special programs & initiatives to promote education & training
- Modern working models
- Exemplary promotion of diversity

## Data privacy



### Leading role in data privacy & data security

- Data privacy report & Security on the Internet report
- Early warning system against cyber attacks

## Sponsorship



### Commitment to culture & sport

- Amateur & professional sports e.g., German football association (DFB), Bayern Munich, Olympics & Paralympic Games/ Special Olympics, "New sports experience" project in recreational sports
- Culture/examples: International Beethoven Competition, Beethovenfest

# Employer Deutsche Telekom

Employer Branding

Welcome to **Growthtopia**,  
not a destination but a **journey**.

Take part in an **ever-evolving digital transformation** and **catalyse lasting** change in a world of infinite possibilities.

A personal **experience** rich in challenge, where **standing out means standing up**.

## Facts & our employer positioning



approx. **78.600** Employees in Germany



**4.908** Dual students/ trainees



**27,9%** women in top/middle management

Figures based on annual report 2023.



## Awards

(Selection)

Leading Employer 2023



Best apprenticeship employer 2023



Top LinkedIn Company



# We won't stop until everyone is connected.

It is in our nature to seek the company of others: humans need this interaction in order to move forward. Sharing fosters closeness. It is the very reason we choose to share our important moments with those important to us.

We share events, experiences, and opinions – sometimes even our possessions. We share knowledge and our ideas. And quite often, by sharing these thoughts, we turn them into something bigger, something better. That is what drives us.

We, Deutsche Telekom, are more than just another company, which provides society with infrastructure. Whatever the circumstances, we are a trusted companion in both people's private and work lives. Whenever. Wherever. Forever making life easier for people and enriching it is our mission.

Our network is an artery pumping life: fast, reliable, and secure. It provides easy access to all who need it.

We are close to the consumer and are transparent, fair, and open to dialogue. We identify innovative products at an early stage and develop them in collaboration with our partners. We do all of this better than anyone else. This ability forms the basis of trust – an essential ingredient for long-lasting relationships.

Precisely this is the essence of our work at Deutsche Telekom. Together, with passion, focus and sustainability, we are entering a world of infinite possibilities for each and every one of us. It is our contribution to social togetherness.

This connects us.

# Our guiding principles



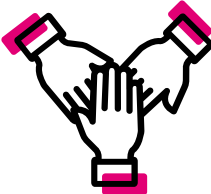
**Delight our customers**



**Get things done**



**Act with respect & integrity**



**Team Together – Team apart**



**I am T – Count on me**




**Stay curious & grow**

# We are responsive



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Chief Executive Officer (CEO)  
Deutsche Telekom AG

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# Company presentation

01 Profile

**02 Strategy & Transformation**

03 Network, Products & Innovation

04 Service & Brand

# Our strategy: Leading Digital Telco

## Grow

Lead in digital life & work

Best convergent networks+  
& perfect service

Lead in business productivity

Software-defined, secure, global  
networks, IoT & digitalization

Magenta Advantage

New business models  
based on DT assets

## Build & scale Telco as a platform

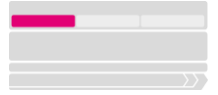
Cloud-based customer and network-service platforms

Best-in-class integrated network infrastructure – DT & partners

## Save for growth investments

Simplify, digitalize, accelerate & act responsibly

# Best convergent networks+ & perfect service



## Convergent & omnipresent



- Connectivity through the eyes of customers, not tech-centric
- Best & reliable connectivity across all bearers

## Personalized & context-aware



- Customers get the connectivity they need: Personalized & context-aware services
- OTT-like experiences: plug'n'play & predictive maintenance

## Network+



- Selected services make the network come alive
- Made possible by the connected home, Magenta TV and our own "HomeOS"

## Our ambitions 2024e

≈ **10 mn** FMC households



Industry leading growth in branded postpaid customers



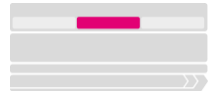
Extend all-time-high customer satisfaction



Please click here for the all-in-one document of DT's Capital Markets Day in May 2021

# Software-defined, secure, global networks

IoT & digitalization



## Software-defined



- End-to-end cloud-native, modular network services
- Network integration capabilities into customer-specific app/IT landscape

## Global connectivity



- Partner of choice for multinational companies with global connectivity
- Smart provision of global connectivity based on own and third-party infrastructure

## “Security by Design”



- Security as integral part of services, production & processes
- Best network security with SASE<sup>1</sup> & zero-trust network architecture

## Our ambitions 2024e

≈+2% B2B revenue CAGR



≈x2 B2B market share



x2 IoT revenue<sup>2</sup>  
(to €0.6 bn)

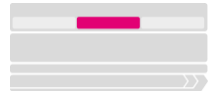


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<sup>1</sup> SASE = Secure Access Service Edge  
<sup>2</sup> DT Group external, GER w/o Smart City

# T-Systems: Leading European IT service provider

with best technology and industry expertise



## Industry multi-cloud & digital solutions



- Lead and grow in Health, Automotive, Public and Public Transport
- Specific industry solutions (e.g., industry clouds, vehicle backend, digital solutions for government and healthcare)

## Focused capabilities and innovation



- Value creation along customer journey: Advisory, Cloud services and Digital solutions
- Horizontal innovations for all industries
- Security and Sovereignty at the core of every solution

## Local presence with global footprint



- #1 IT Service provider in DACH
- Relevant player in selected international markets
- Ability to deliver globally with delivery hubs in Slovakia, Hungary, India

## Our ambitions 2024e

**>10%** Public cloud revenue CAGR



**+2%** Digital enabler revenue CAGR

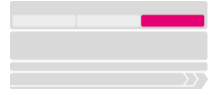


**>30%** Shoring quota

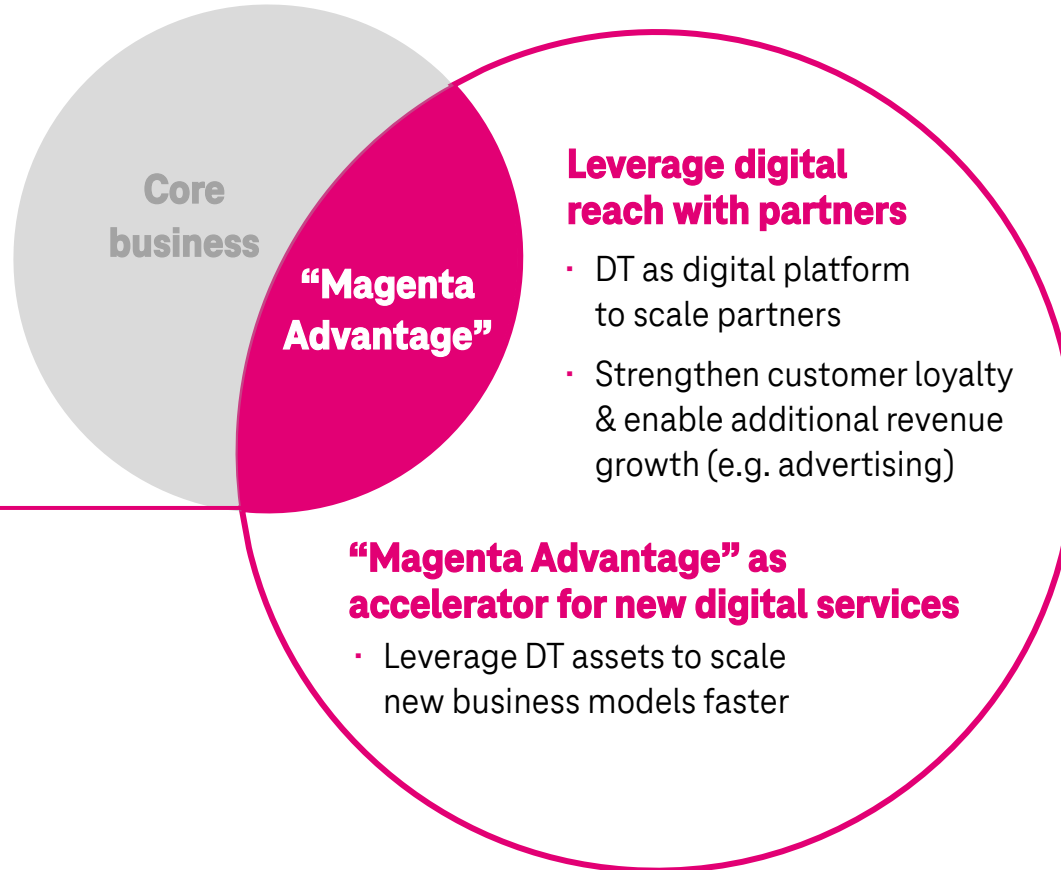


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# New business models based on DT assets



**T**  
**#1**  
trusted brand



## Our “Magenta Advantage”:


**>252mn**  
mobile customers<sup>1</sup>


**>8 Mio**  
tv customers<sup>2</sup>

**T**  
**#1**  
trusted brand

**And many more: App-Users, Shops, Router, ...**

## Our ambitions 2024e


**App penetration**  
73% GER   
80% EU 

**Brand preference ≥ Market share** 

### Leverage DT brand and reach via:

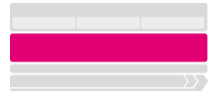
**NEW** standardized APIs to integrate 3<sup>rd</sup> parties

**NEW** D&A and segmentation capabilities

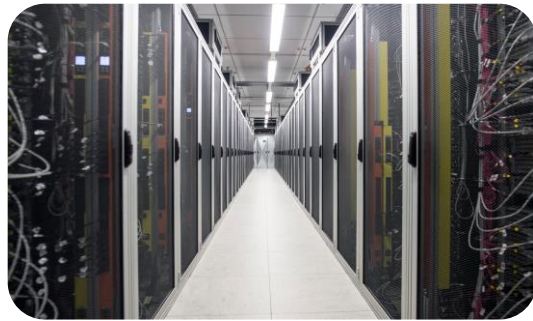
Please click here for the all-in-one document of DT's Capital Markets Day in May 2021 

<sup>1</sup> GER, EU & US; 31.12.2023 <sup>2</sup> GER & EU

# Build & scale Telco as a platform



## Modular services, data & open APIs



- Modular & scalable services – accessible via open APIs
- Provide access to high quality data across silos & apply top notch analytics for best-in-class CX

## “Network of networks”





- Build technology- & domain-agnostic orchestration capabilities
- Automation, cloudification & disaggregation

## Best infrastructure






- Leadership in fiber & 5G
- DT with high infra-share (>60%) for ownership economics
- Strategic cooperations for faster network rollout



## Our ambition 2024e

**x4** Fiber HH up to 2.5 mn p.a.   
**+0.2 mn** Fiber HH<sup>1</sup> to 1.1 mn p.a. 

**Leadership in fiber**

**97%** 5G PoP coverage<sup>2</sup>   
**>75%** 5G PoP coverage<sup>2</sup>   
**≈97%** 5G coverage (already 2022e)<sup>3</sup> 

**Bring 5G to the masses**

**80%** Share of cloudified production in IT<sup>4</sup>   


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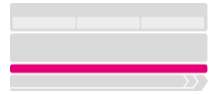
<sup>1</sup> NatCos in AT, CZ, GR, HR, HU, ME, MK, SK

<sup>2</sup> Population

<sup>3</sup> 600 MHz, 90% for 2,5GHz in 2023e

<sup>4</sup> ≈55% in NT (core network); GER: 67% & EU: 42% in 2024e

# Save for growth investments



## Drive efficiency...



**Digitalization** (→ see next page)  
Increase organizational efficiency by automation of manual processes

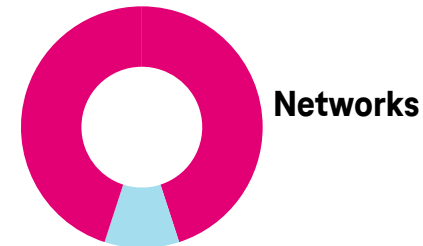


**Economies of skills**  
Invest in the best talents, build once and scale X-footprint (e.g. OneApp)



**Rigorous cost discipline**  
Transform towards lean & agile telco to further reduce indirect cost

## ...to fund investments into future growth



Other innovation

**DT's innovation vehicles & focus areas**

<b>CIF</b>	5G Campus, mobile connect, MagentaX	Corporate Innovation Fund for internal seed & acceleration funding
<b>I HUB</b>	celo	Innovative products developed by cross-functional teams in agile collaboration formats
<b>hub:raum</b>	CONTIAMO, TERAKI, HYPELABS	Startup incubator providing support with infrastructure, logistics & financing
<b>T-Labs</b>	TLABG, AI Foundry	Internal research and development department
<b>T Capital</b>	Clearx, teridion, INCE, celo, U-WAR	Strategic investments in external companies
<b>Partnerships</b>	G	Joint innovation projects with partners
<b>Spin-offs</b>	DRONIQ, MobileEdge, COMBORTIANDR	Investments in spin-offs from internal projects
<b>DTCP</b>	aryaka, cellnex, ne04j, Lookout	Financial investments in external companies

## Our ambition 2024e

**-€1.2 bn** Indirect cost reduction (DT ex US)

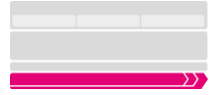
**≈€8.2 bn** Cash CapEx (DT ex US)

**>€18 bn** FCFAL (DT Group)

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# Simplify, digitalize, accelerate...



- Boost eSales & **digital reach**
- **Service automation** & remote provisioning
- **Predictive & proactive** maintenance

## Customers & Frontline



## Network & IT

- Open RAN & **cloudification**
- **Agile, cloud-native IT** (#time-to-market)

## Operations

- Scale **RPA & AI ...**
- ... to boost **internal efficiency** (+€300 mn EBITDA AL impact by 2024e)


## Our ambition 2024e

**30%** eSales share 

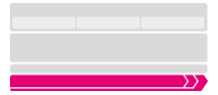
**25-30%** eSales share 

**2** months time-to-market 

**1** month time-to-market 

Please click here for the all-in-one document of DT's Capital Markets Day in May 2021 

# ...and act responsibly



## Environment



- Protect climate by vigorously executing our climate strategy
- Enhance protection of resources, push circularity & zero waste
- Increase energy efficiency during network growth

## Social




- Empower participation in a fair and democratic digital society – for customers and employees
- Foster digital competencies & responsibility as well as ethics
- Employee health and working conditions

## Governance






- Execute CR policy and governance
- Build sustainable supply chains
- Ensure accountability to stakeholders (e.g. include ESG in executive STI<sup>1</sup>)


## Our ambition

0% Net Zero own emissions 2025<sup>2</sup> 

0% Net Zero emissions value chain 2040<sup>3</sup> 

x2 Double energy efficiency by 2024e<sup>4</sup> 

 Maintain all-time-high in employee satisfaction 

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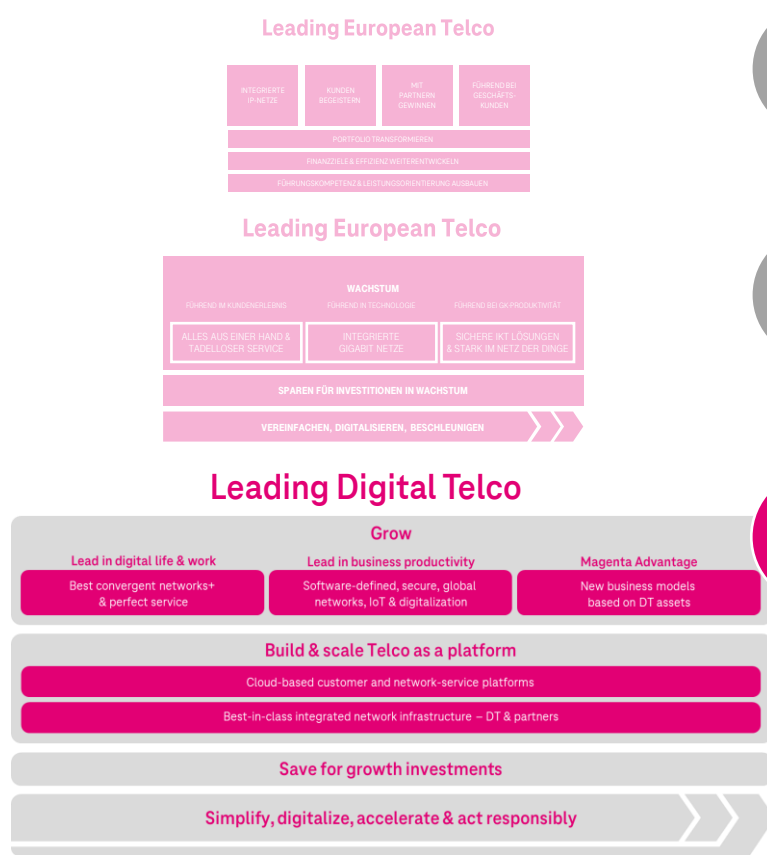
<sup>1</sup> Short-Term-Incentive <sup>2</sup> Net Zero for Scope 1+2 (emissions from own activities & from purchased energy)

<sup>3</sup> Zero value chain emissions incl Scope 3 (emission from upstream & downstream activities) <sup>4</sup> as communicated on CMD 2021

# Our commitment



## Strategy development



## Our performance



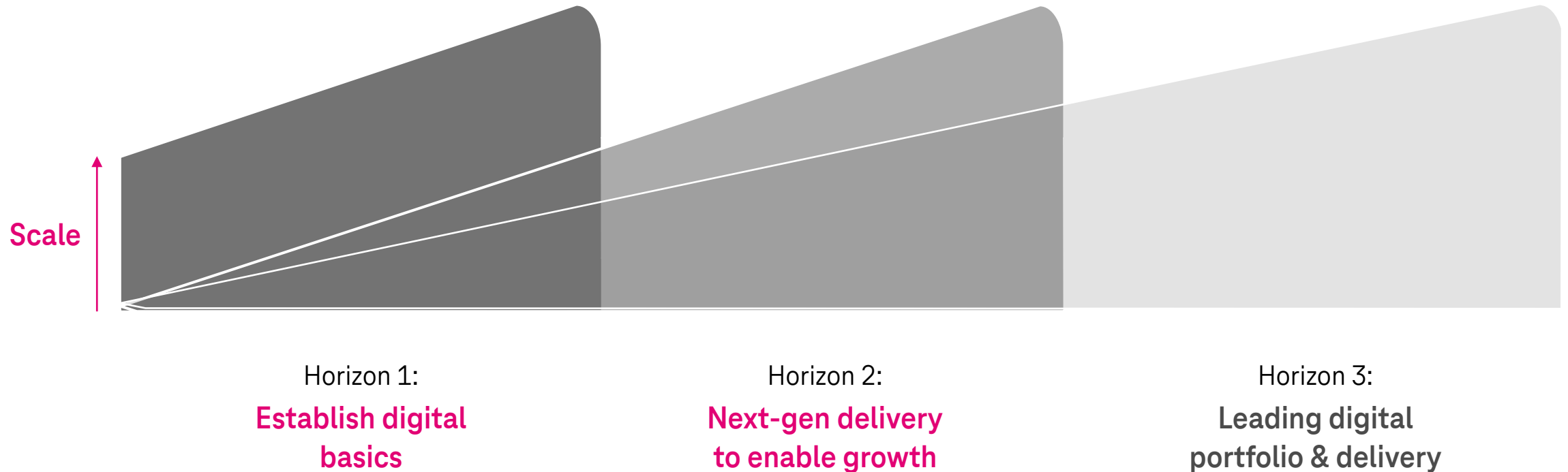
<sup>1</sup> Stock price as of 30.12.2014; 30.12.2021

<sup>2</sup> Incl. inorganic effects; ambition 2024 based on CMD 2021 promises for Revenue & EBITDA AL adj.

# Our way towards Leading Digital Telco



◆ ————— Capital Markets Day Ambition (2021-24) ————— ◆



# Our strategy: Leading Digital Telco



# Company presentation

01 Profile

02 Strategy & Transformation

**03 Network, Products & Innovation**

04 Service & Brand

Multi award-winner:

# Our best network (Germany)

**5G**

**> 80,000**

5G antennas

**Fiber**

**730,000 km**

fiber-optic cables

# Our best network at a glance

Germany

## Fixed network

**730,000 km**  
fiber-optic cables

**> 23.3 million broadband connections\***

**19.1 million lines with FTTH\***  
fiber-optic connections in Germany

**36 million households**  
Tariff up to 100 Mbit

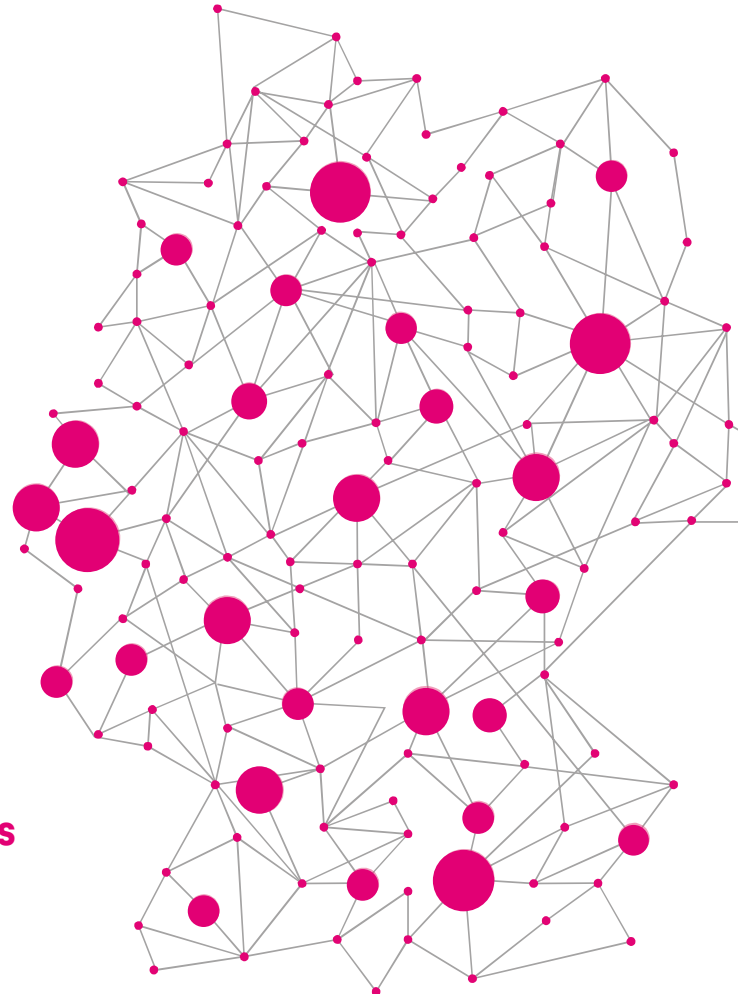
## Mobile network

**> 80,000 5G antennas**

**96% 5G network coverage**

**99,6% LTE coverage of population**

**53 campus networks**  
active



\*Retail and Wholesale

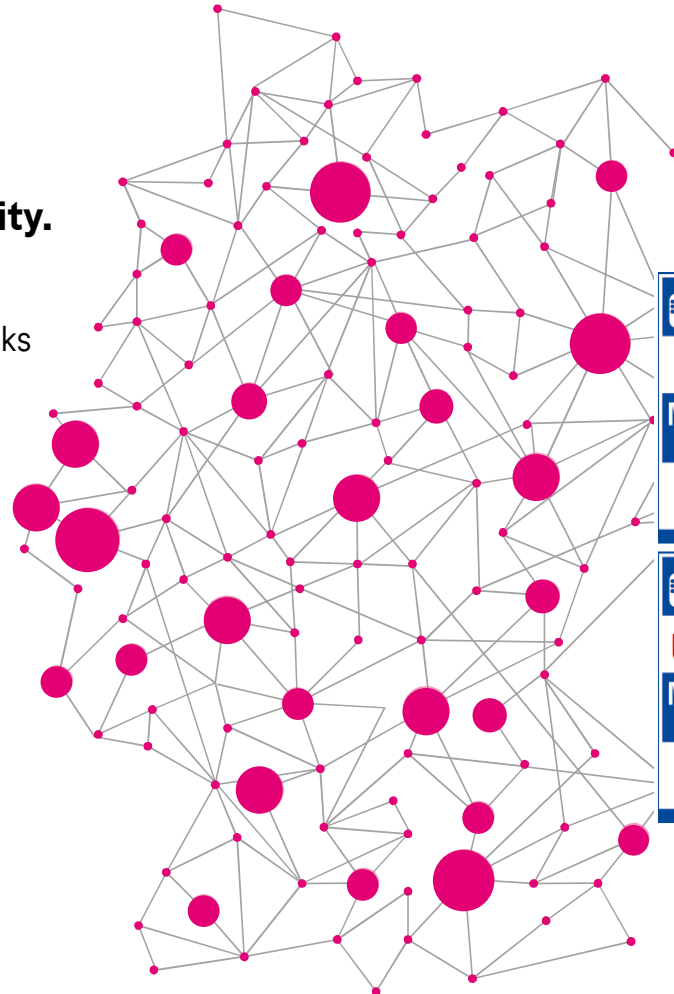


# Our best network at a glance

## Prizes and awards

### Best network coverage, bandwidth, and stability. Both fixed and mobile.

- Broadband quality leader in mobile and fixed networks
- Innovative products
- High bandwidths and state-of-the-art technology
- Excellent network coverage

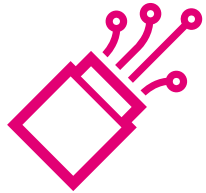


### Repeatedly awarded



# We offer the best network coverage, bandwidth, and stability.

Both fixed and mobile.



## Network coverage

With our 5G network, we reach >96 % of households in Germany and are far ahead of competition. We deliver top speeds with the most cutting-edge mobile network and largest fiber optic network in Germany. In total, we have laid 730,000 km of fiber optic cables.



## Hybrid

Our hybrid connection combines the strengths of fixed network and the mobile network: maximum performance at an increased data load.



## Vectoring

With our vectoring rollout, we are optimizing the capacity and speed of our existing network. With Supervectoring we increase performance up to 250 Mbit.



## Investments

The expansion of broadband networks accounts for the majority of the group's domestic investment volume of more than € 5 bn per year.



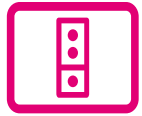
## 5G

With 5G we are creating a mobile network with a high level of reliability, extremely short response times and high data throughput rates. With more than 80,000 5G antennas.

# The network of the future is setting the courset

Network requirements are becoming more complex

**The fiber optic and mobile networks in Germany require further expansion and construction.**



## Bandwidth

The number of broadband lines is continuing to rise. New applications need faster connections and a bigger volume of data.



## Network coverage

Complexity is spiraling – it's not all just about bandwidth any more. Fiber optics, vectoring, 5G and hybrid is the sought-after technology mix to meet the need for widespread network coverage.



## User experience

Virtual and augmented reality are creating new user experiences; self-driving vehicles are just one example. As VR applications require five times the bandwidth of HDTV, the burden on networks will continue to grow significantly.



## Devices

The demand for broadband is booming due to the continual growth of networked devices and wearables. Permanent internet connectivity is posing whole new challenges for global networks.



## Latency

Low latency will be essential for tomorrow's network, for example for self-driving cars or gaming. Round trip delay must be minimized in the mobile network to enable "real-time communication," for example through 5G.

Products for our

# Consumers

MagentaEINS

MagentaTV

Magenta  
SmartHome



# We have the best offers

Products and services for consumers

**We offer products and services that are innovative, safe, and simple too.**



## MagentaMobil

For everyone who is family. For roommates and friends. For close and distant relatives - no matter where you live. You can book a suitable additional card for everyone.



## MagentaEINS

If you combine landline including Internet and mobile phone, you get attractive advantages, such as e.g. B. double or unlimited data volume.

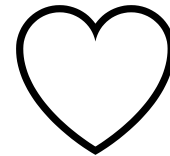


## MagentaTV

It offers something for everyone: TV, series, movies, shows, and documentaries on Megathek, MagentaSport, plus access to streaming services.

# Magenta Mobil – for everyone who is a family

The more, the cheaper



Integrative & convergent!  
**Family & Conficents**

Inexpensive MagentaMobil offers for everyone who is a family.



Uncomplicated & smart!  
**Simplicity**

With our tariffs, we offer a simple and smart offer for everyone.



The more, the cheaper  
**Avarage Price**

With each additional card, the average price for everyone decreases. All Plus cards have the same data volume as the main card.

## DATENBONUS



Personal data bonus: Loyalty is worth it for our Telekom mobile customers. Now secure a minimum of 500 MB and a maximum of 10 GB of individual data bonus every month.

# Call, surf, watch TV, stream.

Magenta EINS – A one-stop shop



MagentaEINS



## Better price

- Save €5 per month



## Better performance

- MagentaEINS: Unlimited or twice the data volume – also for family cards
- MagentaEINS Prepaid: 1 GB data volume on top every month
- Flat rate calls from landlines to all German mobile networks



## More service

- Exclusive service advantage for MagentaEINS customers



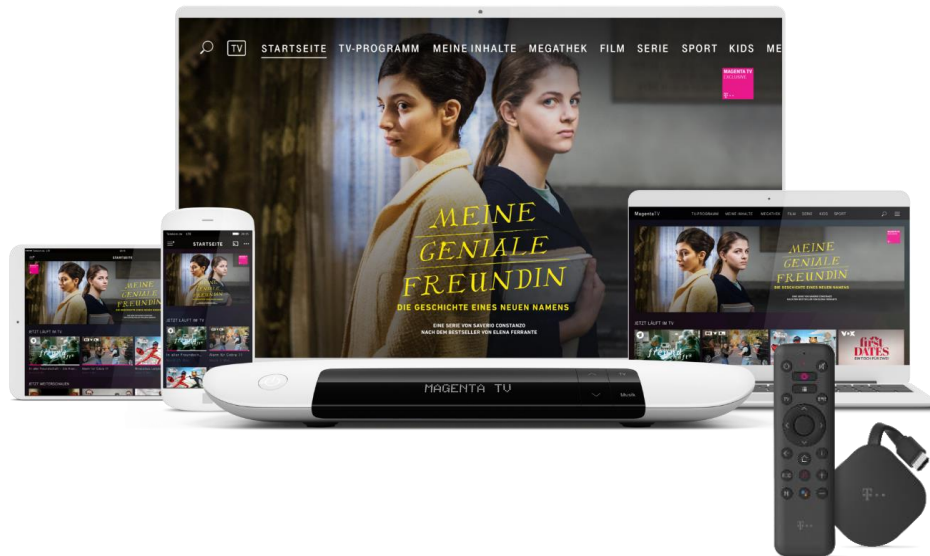
## Personal loyalty bonus

- Loyalty pays off for our landline and internet customers. Get a personal loyalty bonus of up to €500 now and join the outstanding mobile network.

# One for all

Magenta TV

**Using MagentaTV our customers watch their favourite shows whenever they want – even on the go.**



## Time-independent television

through restart, 7-day replay, timeshift and recording



## Huge range of shows

on more than 180 TV networks, more than 90 of which are in HD



## Megathek – unique content included in MagentaTV.

Originals and exclusives; the best of ARD & ZDF, top international series and movies, plus highlights for kids and teens



**Best partner content** with access to streaming services such as RTL+, Netflix, Amazon, Disney, Sky, WOW and Videoload plus video and media libraries



More **flexibility**: stream MagentaTV, exclusive series and movies in HD anywhere and anytime. Not only on DT hardware but also on tablets, smartphones, smartTVs, Chromecast, FireTV and AppleTV.



## Intuitive operation

with everything at a glance



## MagentaTV One

Enjoy a superior TV experience with MagentaTV and MagentaTV One. Easy installation. Flexible via LAN or WLAN, independent of the internet provider.



# Digitalization is reaching homes

Magenta Smarthome

**With Magenta SmartHome, our customers have control over their home 24/7 – even when they're on the move.**



## Highspeed at home

The best connection with the best WLAN and the best service offers top internet speed throughout the home.



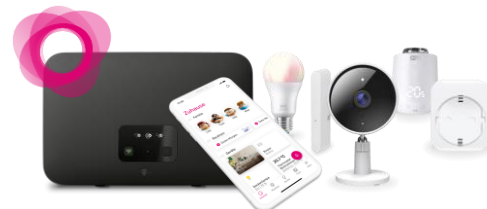
## Fiber

Surfing with up to 1,000 Mbit/s and more is easily possible with fiber optics.



## Hybrid 5G

High speed up to 500 Mbit/s and stable home network with the Smart4 router and the new hybrid 5G technology



## Smart Home

Network your entire home intelligently with a router and MagentaZuhause app and control it via smartphone, TV and voice.

Services for our

# Business customers



**Security**

**Digital**

**Advisory**

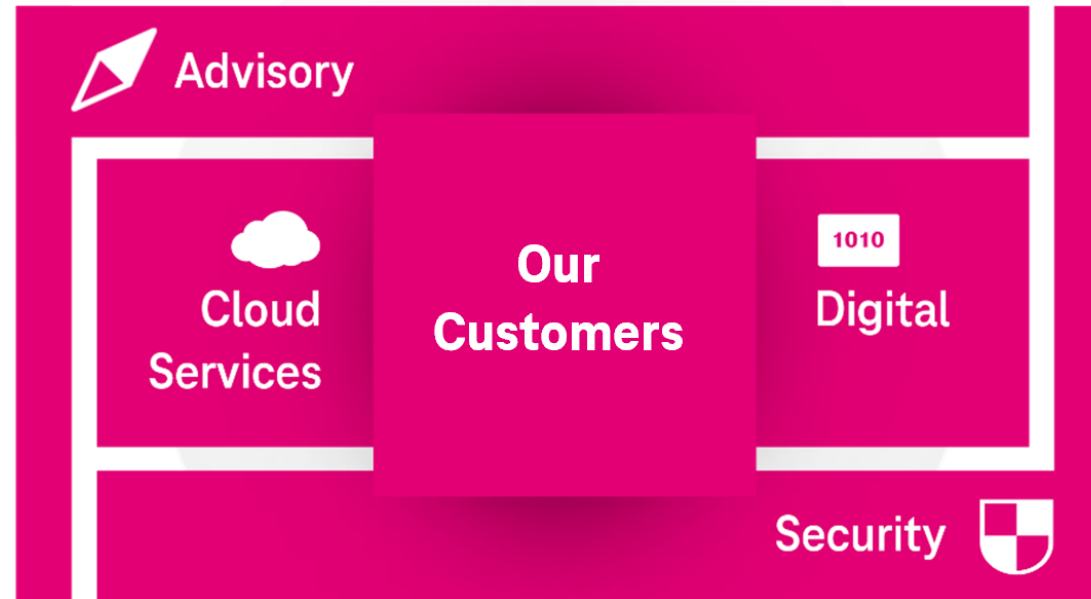
**Cloud  
Services**

# Our holistic approach & our focus areas

**Advice** on best-in-class solutions for your IT landscape



Set-up and operation of **Multi-Cloud environments**



Development of and support in your **digitalization** strategy



Security of your business through state-of-the-art **security services**

# Re-envisioning value addition – Advisory Services



T-Systems with its subsidiary Detecon provides end to end transformations that put **people** first. These transformations begin with **industry-focused insights** into business, technology and operating models.

## Advisory

- Digital Strategy & Innovation
- Digital Operation & Performance
- Business Technology
- Sustainability Consulting

# We deploy best-in-class solutions

to make our customers future ready

- **Chemical Industry**

End-to-end consulting & support for smooth IT infrastructure carve-out in the chemicals industry

- **Public Sector**

Detecon accompanies authorities and public institutions at the federal, state, and municipal levels in the digital transformation of administration

- **Travel, Transport & Logistics**

The next wave featuring (among other things) self-driving vehicles, fundamentally new approaches in last-mile delivery, “digital construction” based on building information modeling (BIM), the secure “digital transport” of information, and digital asset monitoring with IoT and data analytics



# Digitalization of the economy

1010

Shaping the future requires a reliable and competent provider of digital services, Cloud, IoT, Security, and Connectivity – with an agile and end-to-end approach.

# Digital

- Smart Factory
- IT Modernization
- AI & Automation
- SAP Solutions
- New Work Solutions
- Digital Reliability
- Connected Mobility
- Intelligent Enterprise
- Blockchain
- Edge Computing
- Customer Service Solutions / Self Services
- Digital Marketing
- Digital Sales & E-Commerce
- Digital Consulting

# Digital solutions backed by industry know-how

- **BARMER**

T-Systems and Verimi to provide and manage digital identities for its 8.7 million policyholders

- **Beijing Airport**

Beijing Airport is equipped with state-of-the-art Airport Management System

- **DPD Deutschland GmbH**

New work: T-Systems MMS builds new intranet for DPD Deutschland GmbH

- **Rhein-Main-Verkehrsverbund**

The Rhein-Main-Verkehrsverbund tests out a new mobility concept with AI software from T-Systems



# A systematic approach to security



As a Managed Security Service Provider, we provide appropriate consulting and security solutions of Telekom Security for a wide digitalization spectrum.

# Security

- Managed Cyber Defence
- Cloud & Data Security
- Network Security
- Endpoint Security
- Industrial & IoT Security
- Professional Services



# We guarantee digitalization

- **Verkehrsbetriebe Zürichsee und Oberland: Security Training**  
Security training for Verkehrsbetriebe Zürichsee und Oberland AG
- **DB Netz AG**  
Security Consulting with ESARIS creates efficiency and transparency for DB Netz AG
- **Vitesco Technologies**  
T-Systems develops security architecture and realizes security operations center for Vitesco Technologies
- **Verkehrsbetriebe Zürichsee und Oberland**  
Verkehrsbetriebe Zürichsee und Oberland AG practice penetration tests
- **Profidata**  
With managed firewall services from T-Systems, Profidata has a complete firewall solution




# Your right choice for Cloud Services



With strategic partners & by selecting the right provider, T-Systems provides optimal Cloud solutions that include an assessment of existing IT, strategy consultation, migration to the Cloud and Cloud Management as the basis for digitalization.

## Cloud

- Multi-Cloud Environments
- Private Cloud, Sovereign Cloud, Public Cloud
- Cloud Migration Framework for SAP, non-SAP, and Mainframe
- SAP S/4 HANA Consultation & Transformation
-  SAP on any Cloud
- SAP Digital Transformation
- BI & Analytics
- Smart Security for SAP Solutions

# We offer the best-in-class Cloud Services

to fulfil all customer needs

- **Continental**

Future Cloud Infrastructure for flexible SAP-based operation convinces Continental

- **Gerresheimer**

Gerresheimer relies on the combination of Managed Azure and Future Cloud Infrastructure

- **1.FC Köln**

Modernizing its website with AWS and T-Systems

- **Mundi Web Services**

Mundi Web Services makes European satellite data accessible for new business models

- **MAN Energy Solutions**

More flexibility and scalability by moving the IT infrastructure to the cloud



# Industry-focused solutions



**Automotive**



**Public**



**Health**



**Public Transport**



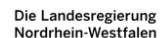
**New Technologies**

Our employees with special industry know-how develop tailored solutions for your industry. You benefit from their experience and best practices from our worldwide industry projects.

# We have leading global players as our customers

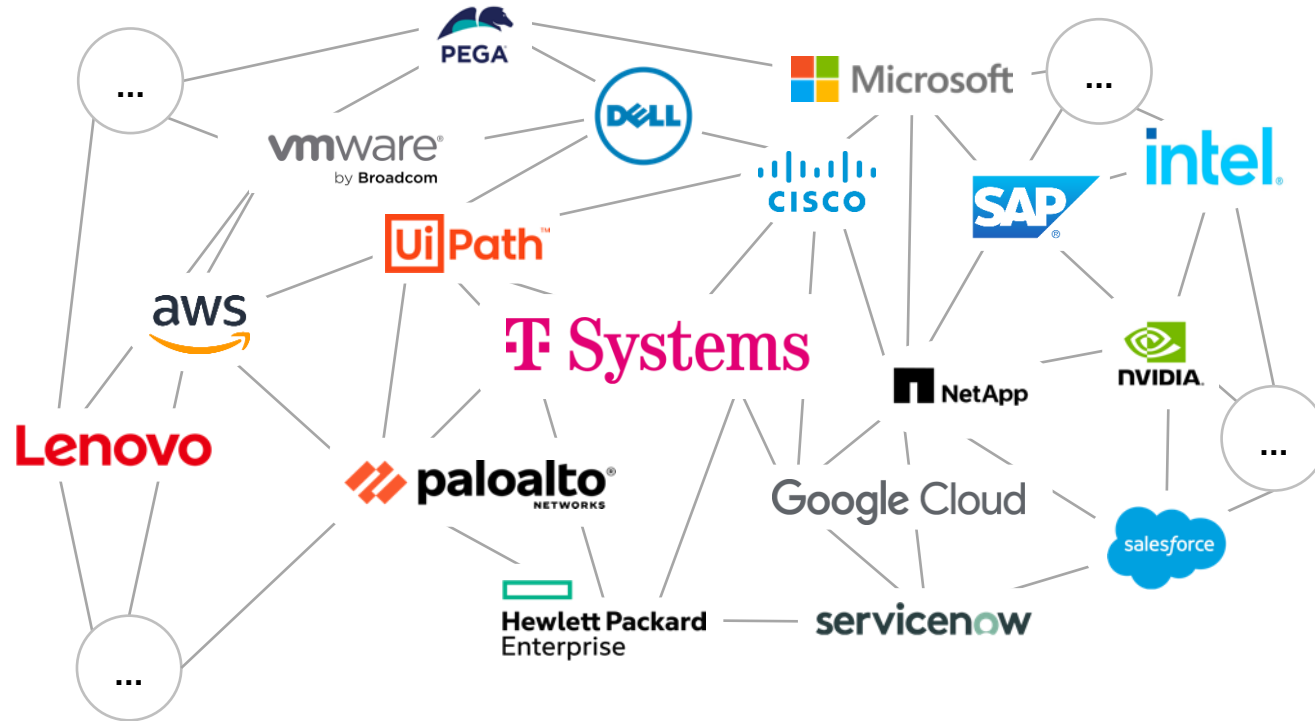
who trust us

Long-term Customer relations and precise knowledge of the respective industries drive our success.



# We have long-term & dedicated partnerships

## Global players and start ups



**500+ prominent technology and industry partners and suppliers, as well as numerous start-ups**

- ✓ Joint solution development
- ✓ Capability augmentation
- ✓ Joint project delivery
- ✓ Co-innovation

# We are awarded across all major industries

by trusted analysts

> 100x

Market Leader Positions



30

Benchmark Reports



Profile

Strategy & Transformation

Network, **Products** & Innovation

Service & Brand

**Collaboration**

**Agility**

**Focus**

Open to the new

**Innovation** at  
**Deutsche Telekom**






# Innovation in cooperation with Partners worldwide



**TECH  
BOOST**

Das Startup-  
Programm der 

**T Capital**

  
**hub:raum**



## Group Partnering

### Scouting innovation worldwide

Increase in revenue and differentiation through complete integration into Deutsche Telekom's product and development processes

## TechBoost

### Partner for B2B innovation business with startups

Innovation partner for Deutsche Telekom business customers, sales partner for startups. Establishment and expansion of economically sustainable customer relationships

## T.Capital

### Corporate venture capital in strategic fields

Strategic investments in early-/mid-stage companies with business synergies with Deutsche Telekom. Gain early access to new disruptive technologies and markets

## hub:raum

### Innovation transfer from the world of startups

Early development of new business ideas through continuous scouting, startup challenges and strategic investments

## T-Labs

### Research with the world's best universities

Developing feasible ideas – T-Labs identifies relevant approaches from the academic world

**Time to market**

short term

long term

Profile

Strategy & Transformation

Network, Products & **Innovation**

Service & Brand

# Innovation topics

## Examples

### Home Orchestration



#### Best digital home experience

Our Home Experience creates an integrated and orchestrated digital family life around the home to enable richer use cases across all Magenta services, incl. TV & entertainment, Smart Home, security, voice control, and apps

### Broadband Router



#### Powerful RDK router platform

Standardized common router platform across multiple access technologies (xDSL, GPON, 5G/FWA, DOCSIS) based on global open-source RDK ecosystem – enabling best home connectivity and data-driven services for the customers

### Edge Cloud



#### Cloud closer to devices & customers

Edge cloud brings data processing to the edge of the network, closer to devices and customers, and enables low latency use cases such as augmented reality or connected driving

### Campus Networks



#### Exclusive networks increase performance

Dedicated cellular connectivity, edge computing and integrated digital applications empower enterprises' production automation, flexibility and resilience

# Company presentation

01 Profile

02 Strategy & Transformation

03 Network, Products & Innovation

**04 Service & Brand**



**25,100**

service employees

**Digital service**

“Telekom hilft”, MagentaApp,  
VoicelD, ...

**5.6 million**

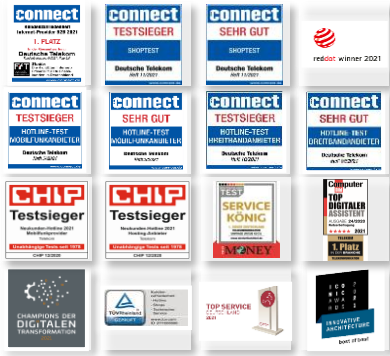
subscriber lines provisioned/year

Award winner

**Our service**

# Best customer service

Example: Germany



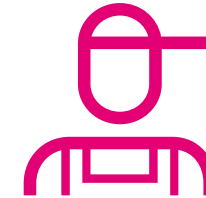
## Outstanding customer service

- Awarded regularly: TÜV's "good" seal of approval for customer service
- Test wins in all areas: landline, mobile, online, shop and call



## Customer service

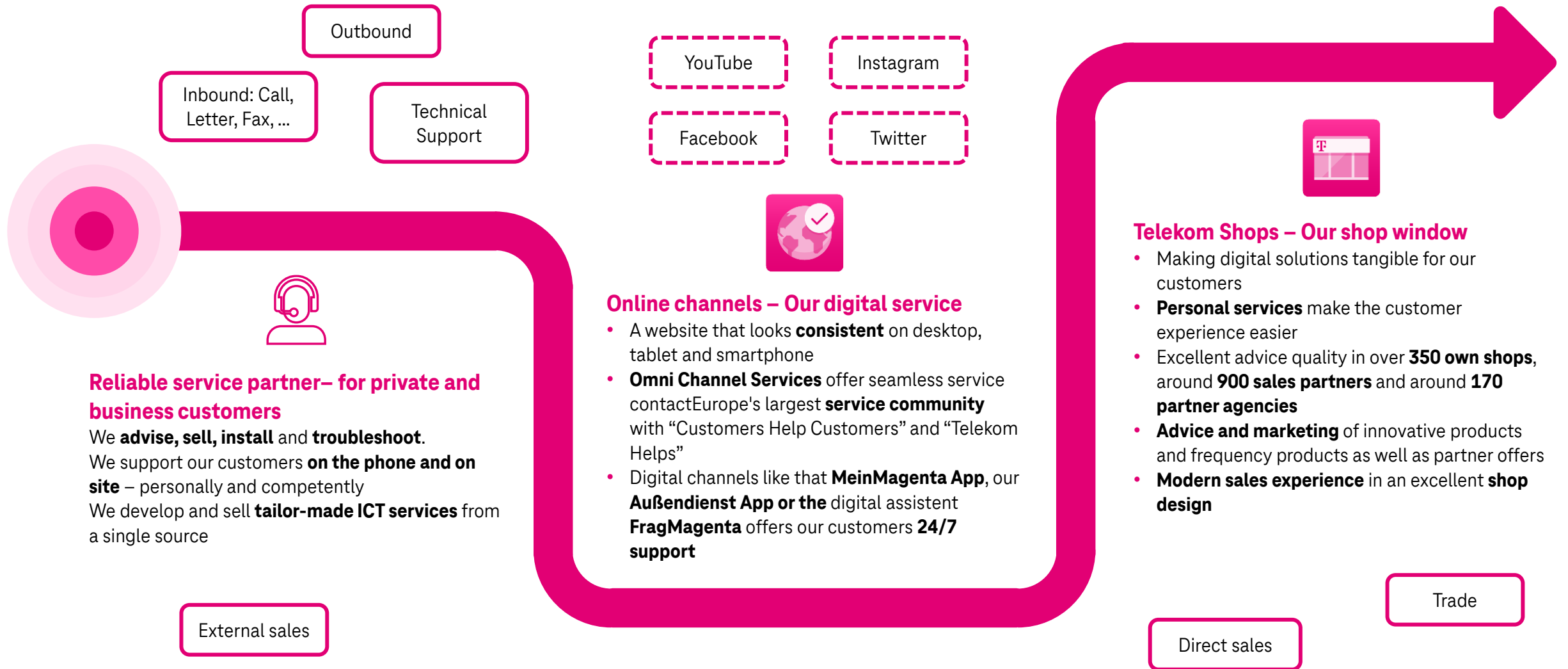
- **33.2 million** phone calls per year
- **9 million** letters/faxes/emails per year
- Customer service in SocialMedia: "Telekom hilft" [Telekom helps] on Facebook and Twitter feedback platform
- Customer service via app: MagentaService app and DSL Hilfe app



## Workload field service

- **26,2** on-site customer appointments per day in Germany
- **5 million** subscriber lines provisioned per year
- **1.8 million** customer line faults cleared per year

# Our service is cross-channel and personal



# Leading in the sector

Our range of customer service options



## Dialog and service quality across digital contact channels

- As a communications provider, we offer the best overall tracking across all sectors and keep our customers satisfied through digital contact channels such as Facebook, Twitter, video chats, or online communities
- We are the only provider to be strongly positioned across all digital channels and touchpoints compared with direct competitors
- Our “Telekom hilft” customer service brand is considered the most appealing



## MeinMagenta app

- MeinMagenta app is the most comprehensive service app from any telecommunications provider and offers the most extensive range of functions for mobile and fixed line customers
- MeinMagenta app was awarded two consecutive years best telco app in Germany by magazine Connect
- MeinMagenta app offers wide service range, e.g. check data usage and costs, view bills, review rates and contracts, online help, personal offers or router installation
- AskMagenta is an AI-based chatbot – fully app integrated it supports customers in (almost) all service dimensions, clears requests or intelligently forwards to (human) colleagues (live chat & call back)

# New services for our customers

Our range of customer service options



## My Telekom technician

- We tell the customer when the service technician will be on site
- The customer can postpone appointments using the online service
- Live service technician status
- The online service offers a direct channel for customer feedback



## Chatbots

- Our digital service assistants answer customer queries quickly, simply, and around the clock



## Callback service

- Our Deutsche Telekom customers don't have to wait on the line; we call them back
- Customers can be put through to the same consultant again



## Voice ID

- Our customers can use their own voice to prove their identity on the hotline
- The process is secure and extremely simple
- Customers no longer have to remember their customer number



## WhatsApp

- Quick, easy and intuitive channel to get in contact to Telekom via WhatsApp
- Customers place requests no matter where they are. The customers don't have to adjust to DT, we follow customer preferences
- Questions anytime via preferred channels



## MediaTransfer

- MediaTransfer is a simple digital entry channel for solving customer requests in first contact
- Customer can send documents, photos and signatures directly via link during call – easy without additional codes or entry login-ins



# Our brand



# Our brand

# #1

# GERMAN BRAND

# #1

# EUROPEAN BRAND

# #9

# GLOBAL BRAND



## The World's 25 Most Valuable Brands 2024



1 +1		2 +2		3 0		4 -3		5 +1	
\$516.6 +74%		\$340.4 +78%		\$333.4 +19%		\$308.9 +3%		\$99.4 +0%	
6 -1		7 +3		8 +6		9 +2		10 -3	
\$96.8 -15%		\$84.2 +28%		\$75.7 +28%		\$73.3 +17%		\$71.8 +3%	
11 -3		12 +3		13 +13		14 -2		15 +3	
\$71.8 +6%		\$71.1 +21%		\$70.4 +48%		\$65.6 +5%		\$60.7 +14%	
16 +1		17 -1		18 -9		19 +16		20 -7	
\$60.4 +5%		\$59.4 +1%		\$58.3 -12%		\$53.1 +34%		\$52.8 -14%	
21 -2		22 +5		23 +2		24 -3		25 -3	
\$52.7 +0%		\$50.5 +7%		\$50.3 +4%		\$50.1 +1%		\$49.3 -1%	

# Brand Value Increase

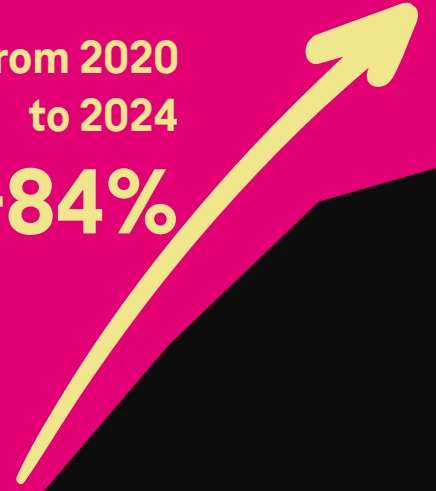
# +765%

Brand Value Global 500 2024  
by Brand Finance plc, London

2007  
8.5 bn. US \$

2024  
73.3 bn. US \$

From 2020  
to 2024  
**+84%**

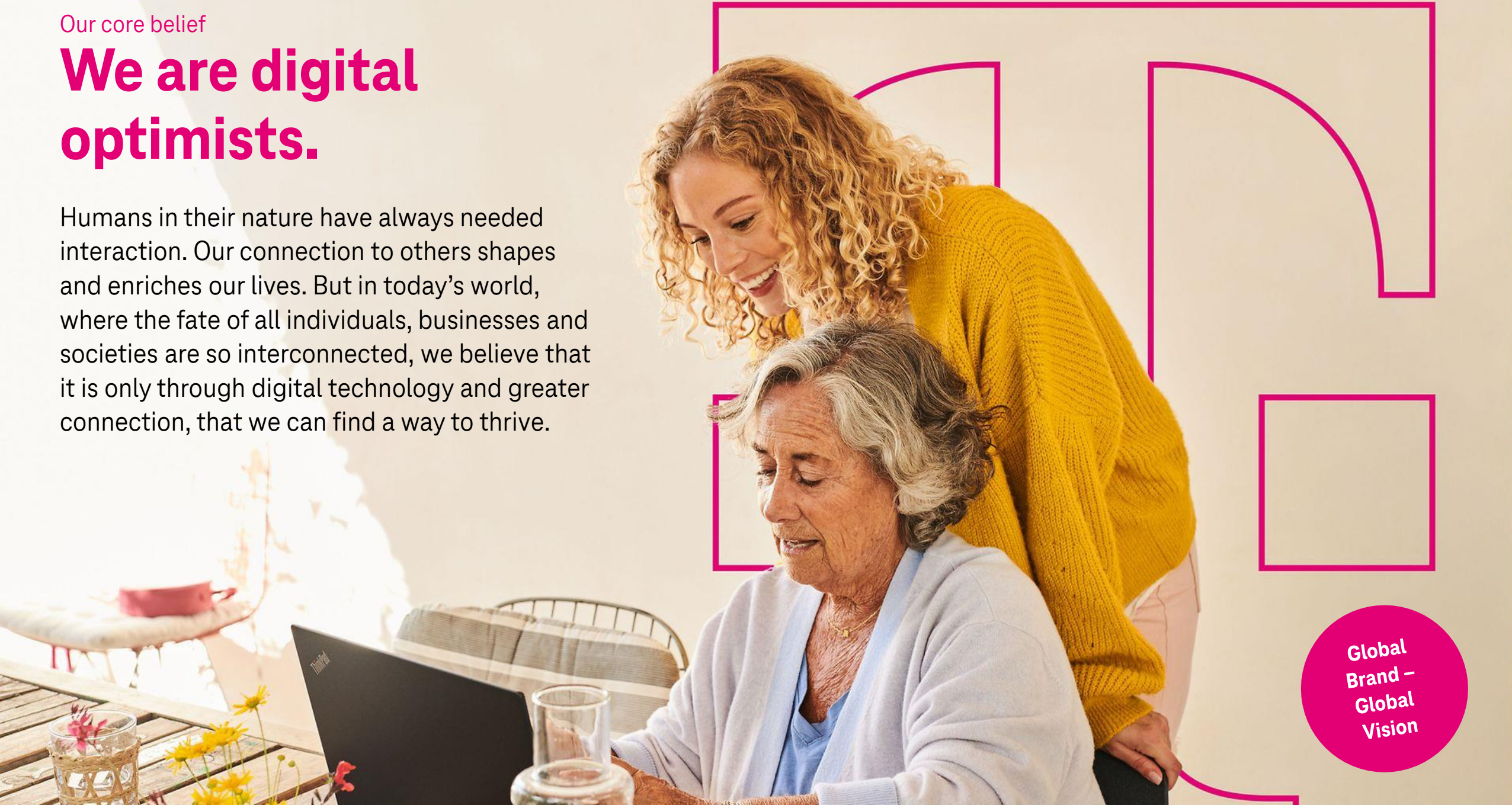


Brand Finance®

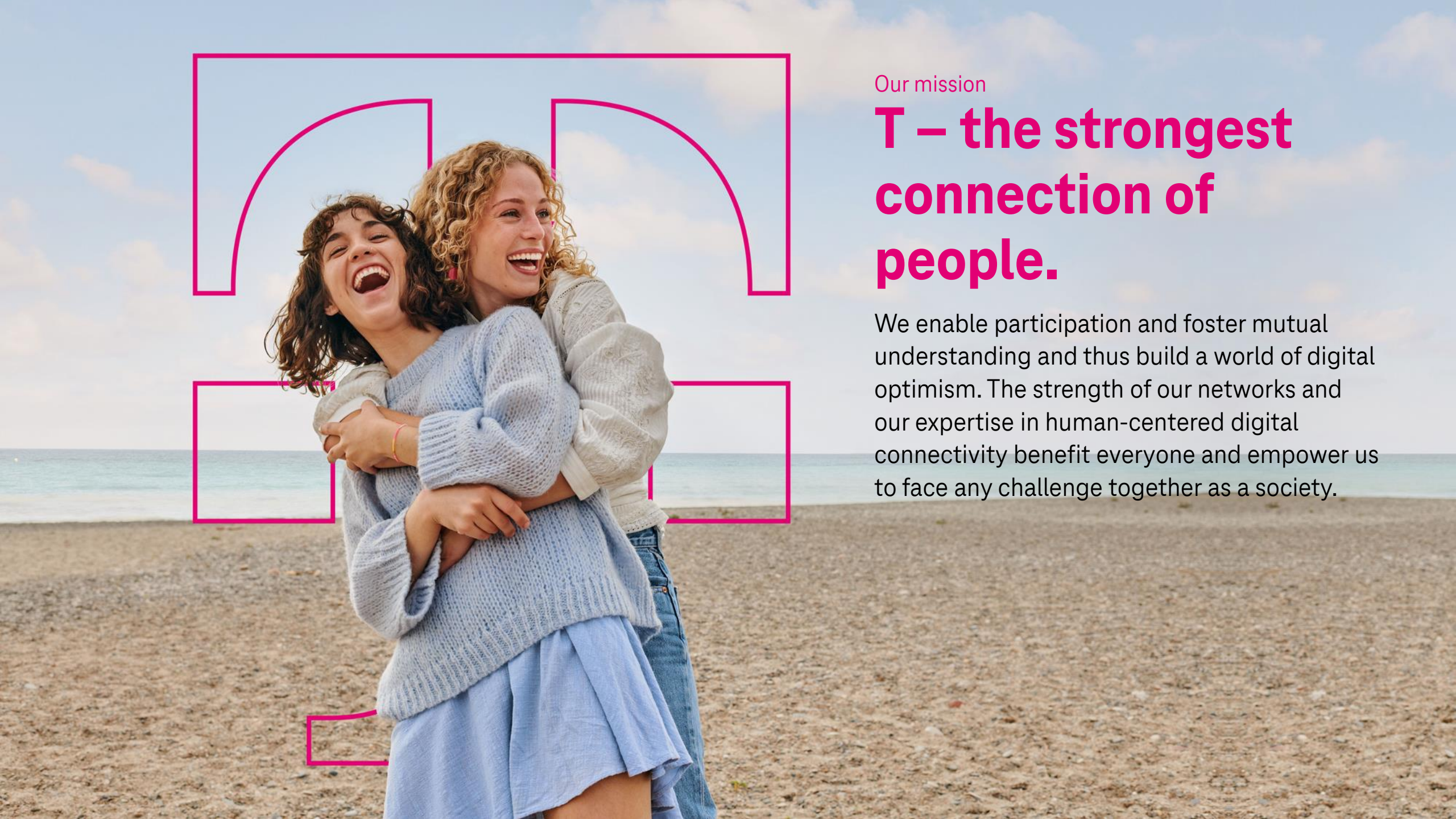
Our core belief

# We are digital optimists.

Humans in their nature have always needed interaction. Our connection to others shapes and enriches our lives. But in today's world, where the fate of all individuals, businesses and societies are so interconnected, we believe that it is only through digital technology and greater connection, that we can find a way to thrive.



Global  
Brand –  
Global  
Vision



Our mission

# **T – the strongest connection of people.**

We enable participation and foster mutual understanding and thus build a world of digital optimism. The strength of our networks and our expertise in human-centered digital connectivity benefit everyone and empower us to face any challenge together as a society.

# Brand Positioning

**Core Belief** → We are digital optimists.

Humans in their nature have always needed interaction. Our connection to others shapes and enriches our lives. But in today's world, where the fate of all individuals, businesses and societies are so interconnected, we believe that it is only through digital technology and greater connection, that we can find a way to thrive. We call this belief "Digital Optimism".

**Purpose** → We won't stop until everyone is connected.

**Role of the Brand** → T as the strongest connection of people.

We enable participation and foster mutual understanding and thus build a world of digital optimism. The strength of our networks and our expertise in human-centered digital connectivity benefit everyone and empower us to face any challenge together as a society.

**Claim** → Connecting your world.

**Brand Personality** → How do we want to be perceived?

**Benefits** → Collective, enables participation, enriches everyday life, inspiring

**Tonality** → Optimistic, vital, honest, open, eye to eye, authentic, strong, reliable

## Brand Themes

→ How do we bring our brand to life?



### NETWORK

We inclusively connect people and businesses to the best and most efficient network – reaching maximum results on a minimum of resource-input.



### SOCIETY

We take a leading role in addressing current societal and environmental challenges. By using our digital solutions we affect positive change and create social cohesion.



### EMPLOYEES

We embody the diversity, inclusivity and sustainability our brand represents. Together we build a recognized company where people like to work, pioneer new working models and promote digital competencies.



### PROPOSITIONS

We relentlessly improve our products and propositions in order to far exceed our customers' expectations, simplify and enrich their everyday life and amplify their business.



### CUSTOMER EXPERIENCE

We create outstanding customer experiences and focus on fairness and transparency. As a reliable companion we reward customers' loyalty in order to build trust and deepen our relationship.

# Magenta Means More

Our Trademarks

**Magenta is more than just a corporate color!  
This unique color became a way of living.**

More than 80% of Telekom employees are proud of their brand and are happy to be identified with it. LOVE MAGENTA allows them to celebrate their pride in their work, sometimes noisily, sometimes very subtly. Together with our strong T-logo, especially the color magenta has a very special impact.

For that reason, LOVE MAGENTA has been creating an exclusive collection of clothing and accessories since 2016 that bring our brand to life. The focus is on unique design that combines our brand elements and the Deutsche Telekom philosophy in exclusive fashion and lifestyle products.

Read more on [lovemagenta.com/about](https://lovemagenta.com/about)



# CONNECTING YOU TO YOUR WORLD



VORREITE DIE WIR TREFFEN KÖNNEN +++ MOBILFUNK AST TO GO\* AUF DIGITAL K. EIN NEUER KOMPAKTER MOBILER SENDEMAST SORGT AUF DER DIGITAL X FÜR DIE FLEXIBLE MICRO-CONT





**Deutsche Telekom AG**  
Friedrich-Ebert-Allee 140  
53113 Bonn