

Deutsche Telekom Company presentation

2024



Disclaimer

This presentation contains forward-looking statements that reflect the current views of Deutsche Telekom management with respect to future events. These forward-looking statements include statements with regard to the expected development of revenue, earnings, profits from operations, depreciation and amortization, cash flows, and personnel-related measures. You should consider them with caution. Such statements are subject to risks and uncertainties, most of which are difficult to predict and are generally beyond Deutsche Telekom's control. Among the factors that might influence our ability to achieve our objectives are the progress of our workforce reduction initiative and other cost-saving measures, and the impact of other significant strategic, labor or business initiatives, including acquisitions, dispositions and business combinations, and our network upgrade and expansion initiatives. In addition, stronger than expected competition, technological change, legal proceedings, and regulatory developments, among other factors, may have a material adverse effect on our costs and revenue development. Further, the economic downturn in our markets, and changes in interest and currency exchange rates, may also have an impact on our business development and the availability of financing on favorable conditions. Changes to our expectations concerning future cash flows may lead to impairment write downs of assets carried at historical cost, which may materially affect our results at the group and operating segment levels.

If these or other risks and uncertainties materialize, or if the assumptions underlying any of these statements prove incorrect, our actual performance may materially differ from the performance expressed or implied by forward-looking statements. We can offer no assurance that our estimates or expectations will be achieved. Without prejudice to existing obligations under capital market law, we do not assume any obligation to update forward-looking statements to take new information or future events into account or otherwise.

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.



Content

01 Profile

02 Strategy & Transformation

03 Network, Products & Innovation

04 Service & Brand

Our Keyfacts

25.4 mn
fixed-network
lines

199,652
employees
worldwide*

22.0 mn
broadband
customers

252.2
mn
mobile
customers

€ 112.0 bn
revenue
in 2023

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 EBITDAAL adjusted

59,709 employees (Reporting date Dec. 31, 2023)

78,600 employees in Germany overall

(Dec. 31, 2023)

Figures based on annual report 2023.

* Retail

United States & Europe

Facts & figures



Figures based on annual report 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 EBITDAAL adjusted

32,932 employees (Reporting date Dec. 31, 2023)

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 EBITDAAL adjusted

62,677 employees (Reporting date Dec. 31, 2023)

T-Systems

Facts & figures



Information technology and telecommunications **services in all industries:** automotive, finance, transport, retail & public sector

Pioneer in cloud computing

Corporate customers, multinational corporations & public sector



€ 3.9 bn revenue

€ 0.3 bn EBITDA AL adjusted

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

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

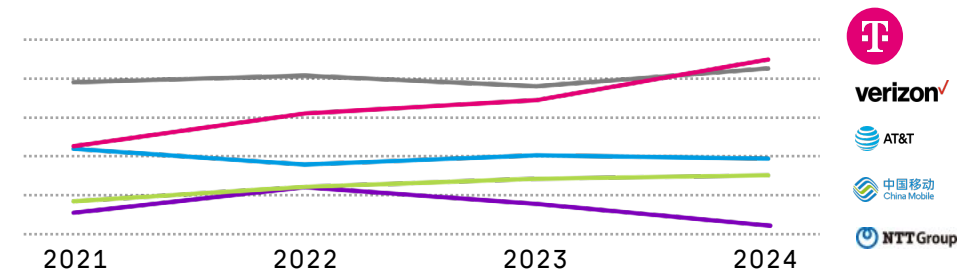
#1

Most valuable Telecoms Brand in the world

Increase Brand Value of **17%** up to

\$ 73.3 Billion

Plus **84%** from 2021 – 2024



Source: Brand Finance Global 500 - 2024

We take responsibility

Corporate Responsibility

Sustainability



Environmental and climate protection

e.g., CO₂ reduction, efficient use of resources, circular economy, sustainable mobility



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



Sustainable innovations and products

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



#GoodMagenta & #GreenMagenta:

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



Sustainable supplier management

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



Supplier selection and development:

Sustainability as a key criterion



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



Success in respected rating indexes and rankings:

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

#GREEN MAGENTA



We take responsibility

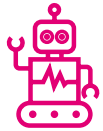
Corporate Responsibility

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

**#GOOD
MAGENTA**



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)

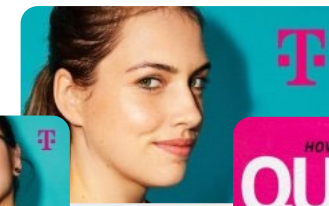
Leading Employer 2023



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



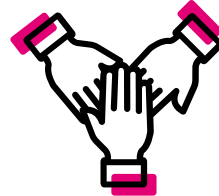
Delight our customers



Get things done



Act with respect & integrity



Team Together – Team apart



I am T – Count on me



Stay curious & grow

We are responsive



Timotheus Höttges

Chief Executive Officer (CEO)
Deutsche Telekom AG

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Content

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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

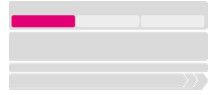
Cloud-based customer and network-service platforms

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

Save for growth investments

Simplify, digitalize, accelerate & act responsibly

Best convergent networks+ & perfect service

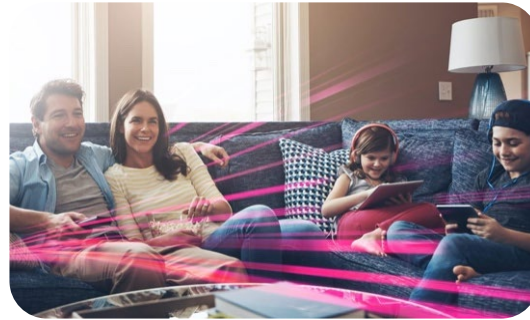


Convergent & omnipresent



- 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



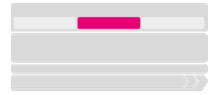
Extend all-time-high customer satisfaction



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 SASE¹ & zero-trust network architecture

Our ambitions 2024e

≈+2% B2B revenue CAGR



≈x2 B2B market share



x2 IoT revenue²
(to €0.6 bn)



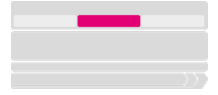
Please click here for the all-in-one document of DT's Capital Markets Day in May 2021

¹ SASE = Secure Access Service Edge

² 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



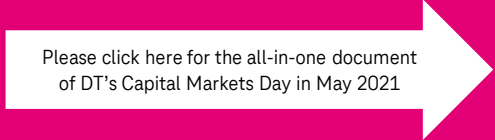
- #1 IT Service provider in DACH
- Relevant player in selected international markets
- Ability to deliver globally with delivery hubs in Slovakia, Hungary, India

Our ambitions 2024e

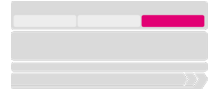
>10% Public cloud revenue CAGR 

+2% Digital enabler revenue CAGR 

>30% Shoring quota 

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New business models based on DT assets



T
#1
trusted brand

Core
business

**“Magenta
Advantage”**

Leverage digital reach with partners

- DT as digital platform to scale partners
- Strengthen customer loyalty & enable additional revenue growth (e.g. advertising)

“Magenta Advantage” as accelerator for new digital services


- Leverage DT assets to scale new business models faster

Our “Magenta Advantage”:





> 252 mn
mobile customers¹




> 8 mn
tv customers²

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:

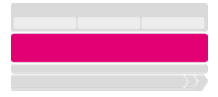
NEW standardized APIs to integrate 3rd parties

NEW D&A and segmentation capabilities

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

¹ GER, EU & US; 31.12.2023 ² 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 HH¹ to 1.1 mn p.a. 

Leadership in fiber

97% 5G PoP coverage² 
>75% 5G PoP coverage² 
≈97% 5G coverage (already 2022e)³ 

Bring 5G to the masses

80% Share of cloudified production in IT⁴ 


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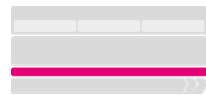
¹ NatCos in AT, CZ, GR, HR, HU, ME, MK, SK

² Population

³ 600 MHz, 90% for 2,5GHz in 2023e

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

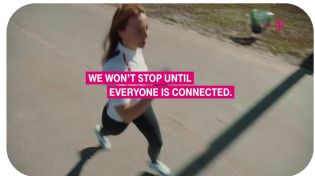
Save for growth investments



Drive efficiency...



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

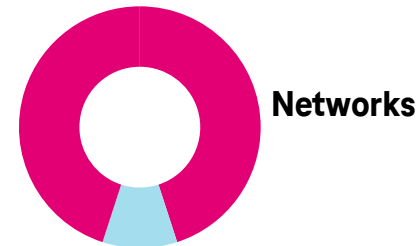


Economies of skills
Invest in the best talents, build once and scale X-footprint (e.g. OneApp)



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

...to fund investments into future growth





Other innovation

CIF	5G Campus, mobile connect, MagentaXR	Corporate Innovation Fund for internal seed & acceleration funding
I HUB	celo	Innovative products developed by cross-functional teams in agile collaboration formats
hub:raum	CONTIAMO, TERAXI, HYPELABS	Startup incubator providing support with infrastructure, logistics & financing
T-Labs	TLABO, AI Foundry	Internal research and development department
T Capital	ClearX, INCE, teridion, celo, UMANA	Strategic investments in external companies
Partnerships	Microsoft, G	Joint innovation projects with partners
Spin-offs	DRONIQ, MobileEdge, COMFORTCHARGE	Investments in spin-offs from internal projects
DTCP	aryca, cellnex, ne04j, Lookout	Financial investments in external companies


DT's innovation vehicles & focus areas

Our ambition 2024e

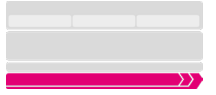
-€1.2 bn Indirect cost reduction (DT ex US) 

≈€8.2 bn Cash CapEx (DT ex US) 

>€18 bn FCFAL (DT Group) 

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

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 

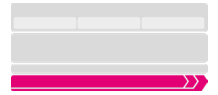
25-30% eSales share 

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 STI¹)

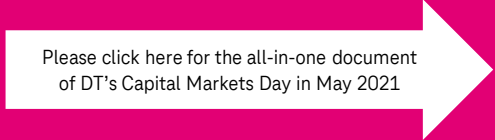
Our ambition

0% Net Zero own emissions 2025² 

0% Net Zero emissions value chain 2040³ 

x2 Double energy efficiency by 2024e⁴ 

 Maintain all-time-high in employee satisfaction 

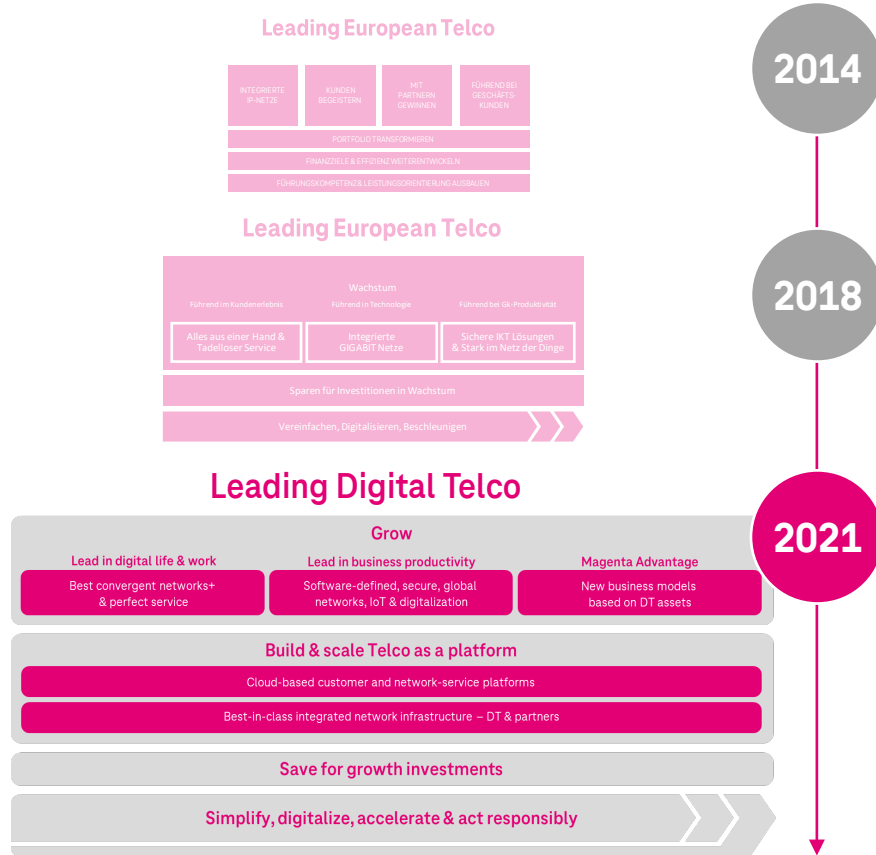
Please click here for the all-in-one document of DT's Capital Markets Day in May 2021 

¹ Short-Term-Incentive ² Net Zero for Scope 1+2 (emissions from own activities & from purchased energy)
³ Zero value chain emissions incl Scope 3 (emission from upstream & downstream activities) ⁴ as communicated on CMD 2021

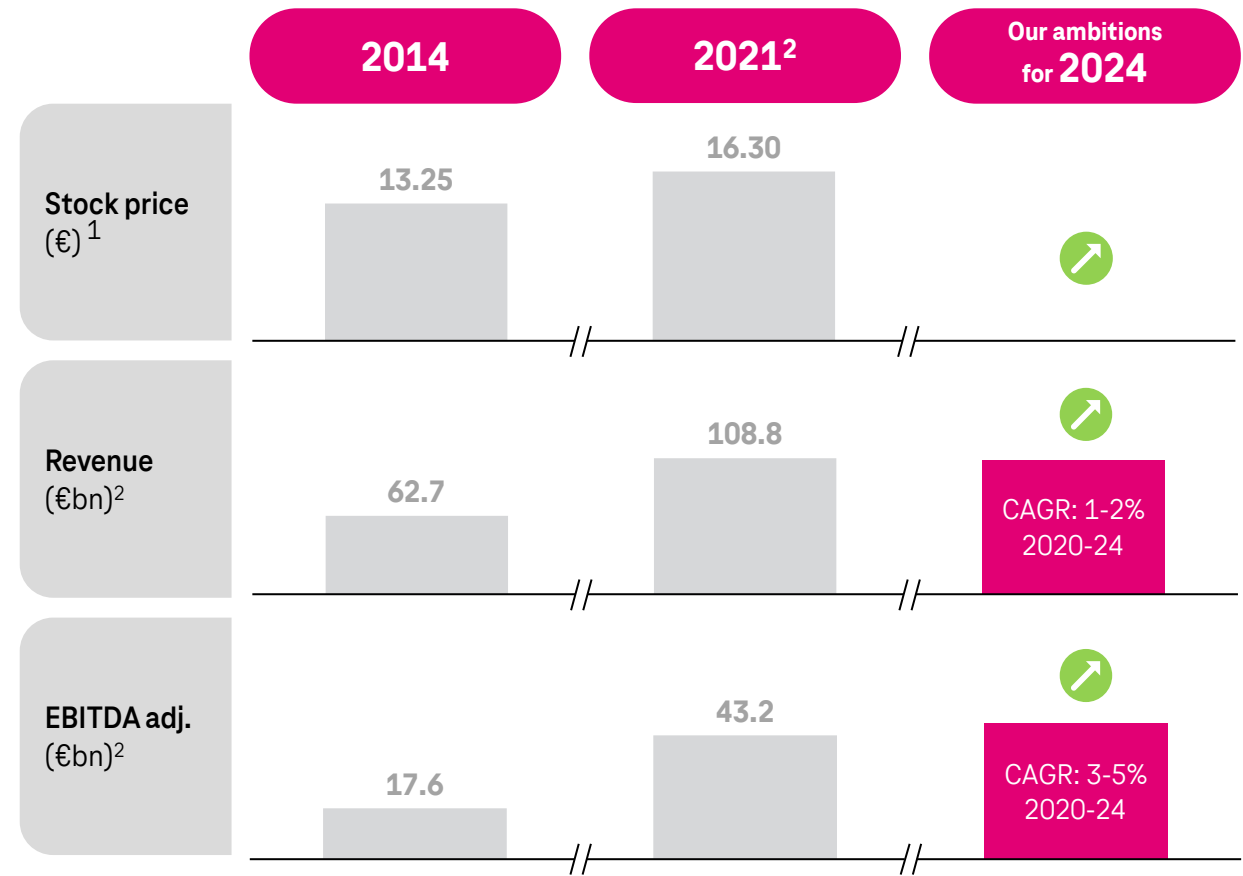
Our commitment



Strategy development



Our performance



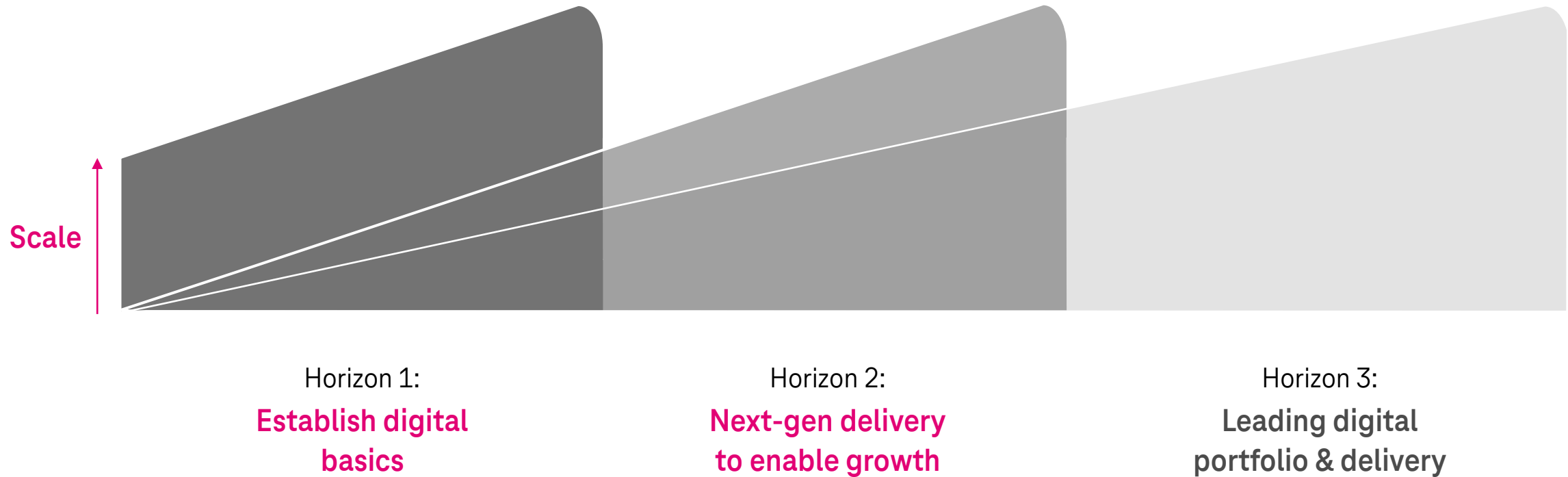
¹ Stock price as of 30.12.2014; 30.12.2021

² 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





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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

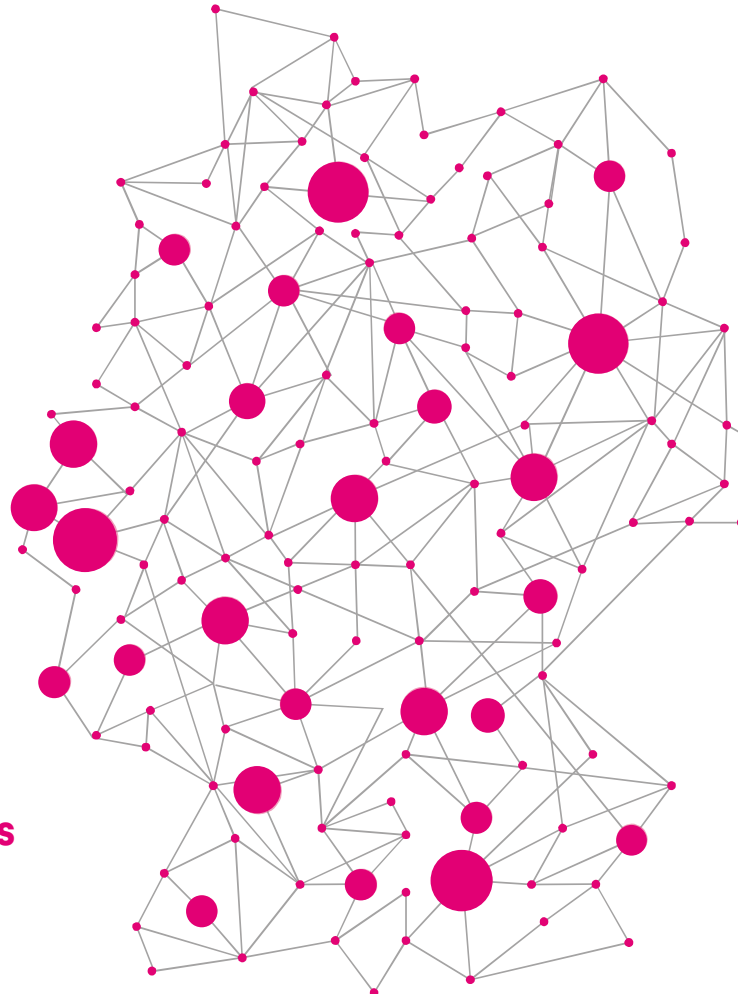
Mobile network

> 80,000 5G antennas

96% 5G network coverage

99.6% LTE coverage of population

53 campus networks
active



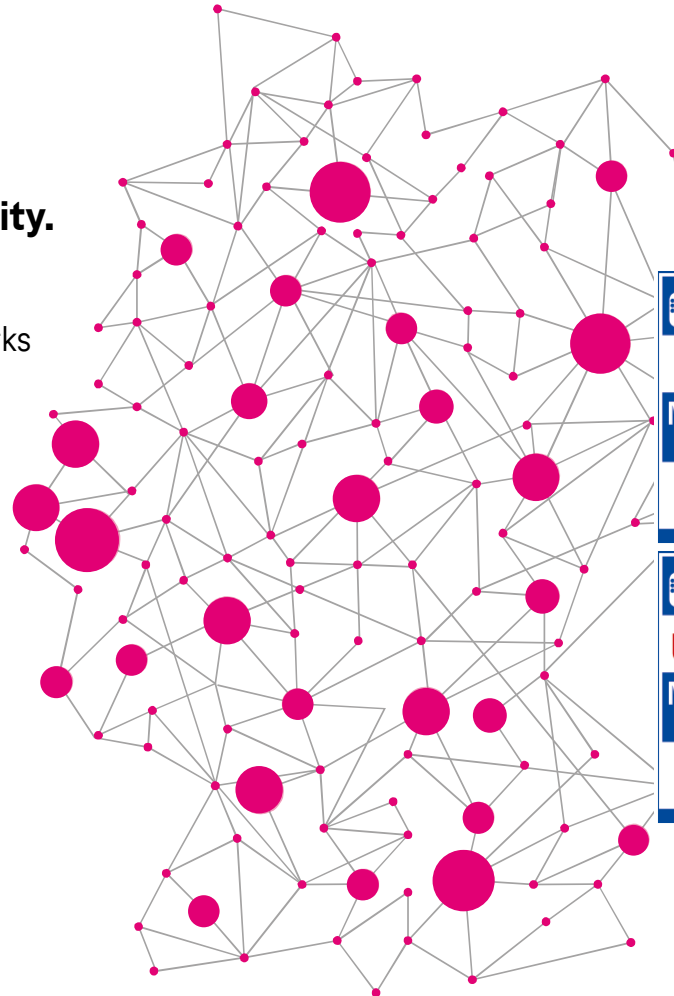
*Retail and Wholesale

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

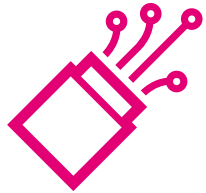


Repeatedly awarded



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.



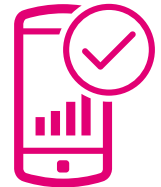
Vectoring

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.



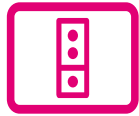
5G

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 anymore. 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
Average Price

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



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

MagentaTV

Using MagentaTV our customers watch their favourite shows whenever they want.



Huge range of shows

on more than 180 TV networks, more than 150 of which are in HD



Time-independent television

through restart, 7-day replay, timeshift and recording

MagentaTV+



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 Disney+, Netflix, RTL+, WOW, DAZN und Paramount+. All on one platform - with comprehensive search function.



Personal quick start bar

All your favorite apps: Customized quick launch bar to get to your favourite content quickly and easily.



Available on all devices

On the TV. Via laptop in the garden. With your smartphone on the train. Or on your tablet on the plane. MagentaTV is always with you and runs on up to three devices at the same time. The new MagentaTV One brings an outstanding TV experience to the screen.

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.



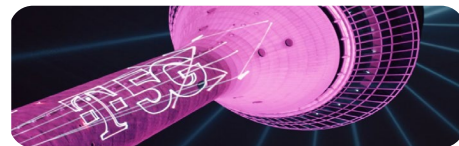
Highspeed at home

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



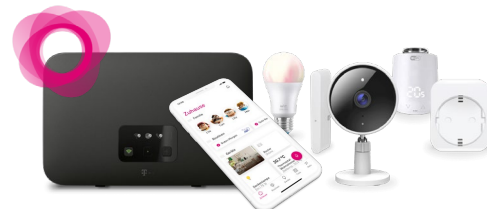
Fiber

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.

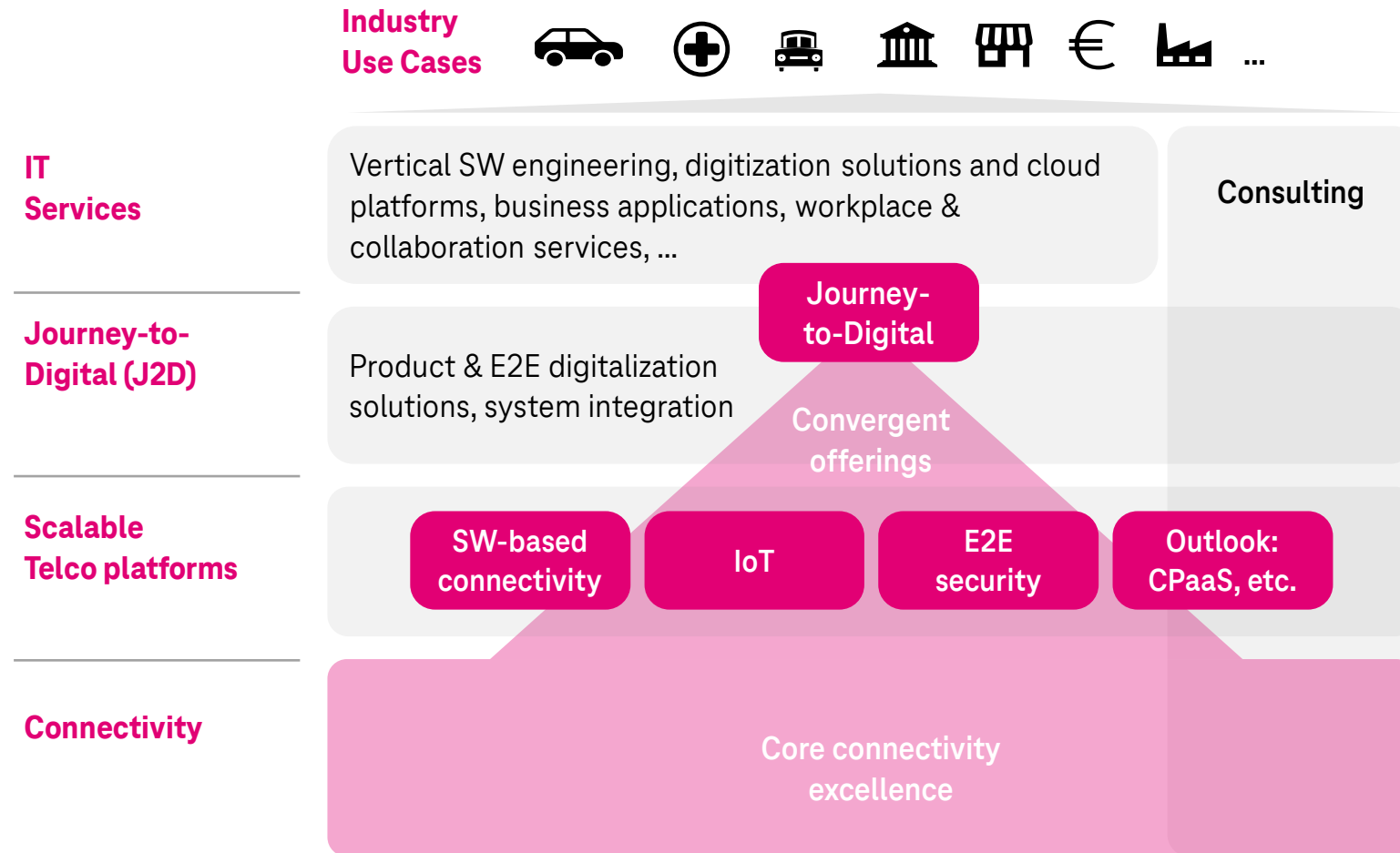
Products for our
Business Customers



**INTEGRATED
B2B COMPETENCE**

From small and medium-sized companies to multinational cooperations and public institutions:
Together, T-Systems and Telekom Deutschland are there for our customers' business.

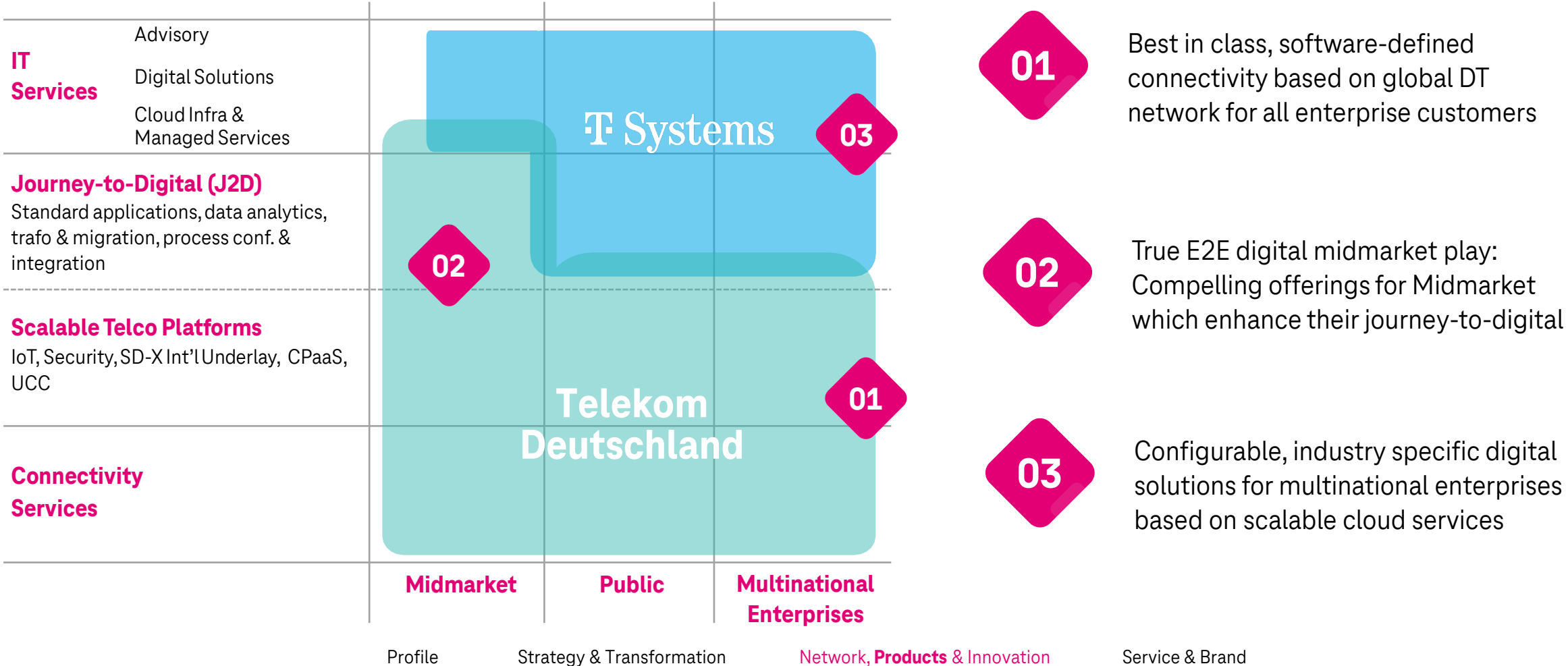
T-Systems und Telekom Deutschland offer End-to-end digitalization from a single source



- Connectivity integrated with platforms & application layer
- Interplay of deep vertical & IT competence
- Providing global, flexible, reliable provisioning & delivery at scale
- Leveraging network of integrated partners
- Customer segment centric go to market

We structure our capabilities for the best customer experience at all levels

Portfolio & Go-to-Market View



Products for our
Business Customers


T- Systems

Security

Advisory

Digital

Cloud Services



T-Systems is the **most reliable** service provider for enterprises. We are one of the few that can **offer IT & Connectivity** from just **one source.**

What T-Systems stands for

92% confirm T-Systems to be **reliable**¹

91% perceive T-Systems as **innovative**¹

T-Systems is part of **TOP 3** European **customer satisfaction** benchmarks²

> 100 **leadership positions** in 30 analyst benchmark reports

T-Systems is one of **3** **RISE with SAP premium suppliers** in Germany

100% **zero outage culture** quality and reliability

1) Brand Tracking Study GER Dec22

2) TRI*M Studie/Competitor Studie 2023



We are big enough to **scale globally** and small enough to **care.**

About T-Systems

#1 IT service provider
in Germany & DACH

3.9 B Revenue with **+5.3 % organic growth** from
2022 to 2023

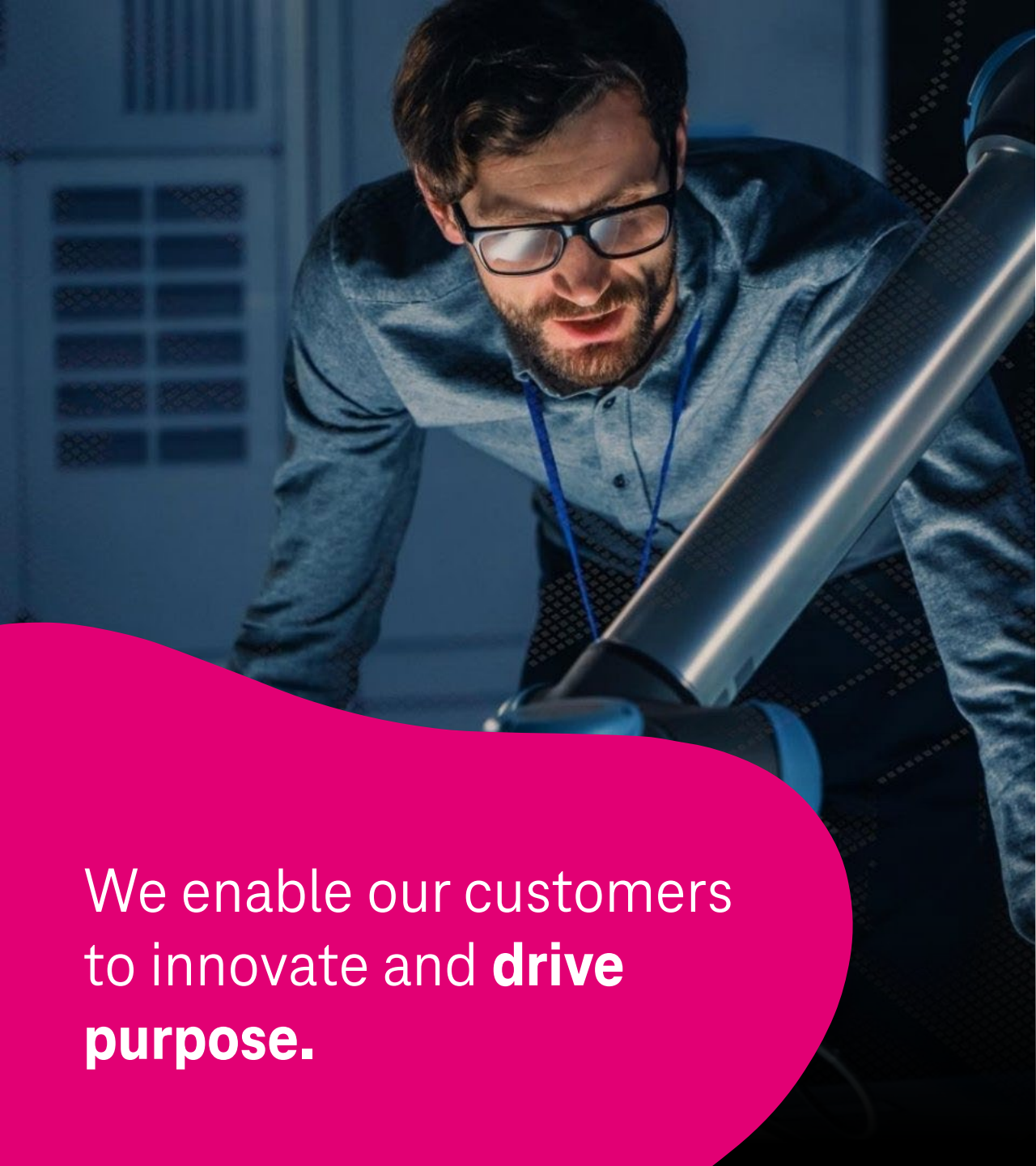
8 Security Operations Centers (SOCs) globally
defending against **> 36 M attacks per day**

26 Countries across Europe, Asia,
and LATAM as well as the US

> 500 Leading technology
partners and suppliers

> 1,000 Customer references
as proof points

> 26,000 Employees (FTE) with
> 20,000 certified experts



We enable our customers to innovate and **drive purpose.**

Together, we change the world

Providing **life-changing insights** with Copernicus Satellite Data



Saving lives by keeping hospitals running



Enabling the future of mobility



Moving millions of people through airport facilities



Delivering **energy to humankind**



Strengthening the **cyber resilience** of Europe



Our global portfolio combines horizontal solutions with deep industry expertise



Automotive

Customer Experience
Software-Defined Vehicle
Industry-X
Journey to Cloud



Health

Digitalization in the Hospital
Digital Health Insurance
Telematic Infrastructure 2.0
Digitalization of Care



Public

Digital Public Administration
Public Sector Sustainability
Digital Sovereignty



Public Transport

Digital Infrastructure
Transport Operations
Digital Maintenance
Passenger Experience

Advisory



Combining management consulting with deep technology expertise to guide your digital transformation journey

Digital

1010

Development of and support in your digitalization strategy

Cloud



Set-up and operations of multi-cloud environments

Security



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

Connectivity



Basis for successful digitization, with fast, agile, and secure access to data and applications worldwide

Connected Customer & Staff
Supply Chain Management
Sustainable Logistics Utilities
Retail IT Modernization



Retail & Logistics

Digitization & Monetization
Transformation & Modernization
Security & Compliance



Financial Services

Accelerated Innovation
Resilient Supply Chains
Smart & Sustainable Factories
Connected Products & Services



Manufacturing

We turn customers into **fans**.

“ With the **T-Systems Sovereign Cloud** powered by Google Cloud, we can now take off on the market with an **innovative, AI-based service for compliance** with the Federal Money Laundering Act.

Maximilian Reinhard, Founder and CPO Legalian.io

“ The **private cloud** is a compelling option for us for **operating our SAP systems**. It combines **stability and cost efficiency**. The migration to a next-generation private cloud was logical.

Christian Eigler, Corporate CIO at Continental AG

“ Security has always played a major role in aviation, and we are pleased that a **strong, reliable partner like Telekom Security** has our backs and responds flexibly to our needs for IT security.

Naby Diaw, CISO at Lufthansa Group

Global players & hidden champions trust us





We turn your challenges
into **our mission.**

Solved customer pain points

DIGITALIZATION

Through RPA T-Systems, automated the processing of > 600 orders daily for Deutschland-Ticket and helped Transdev **avoid hiring 60 workers.**

RESILIENCE

We provided a rapid resolution of incidents and minimization of downtime costs for a logistics giant through AI based solutions. This **reduced the incidents at our customer to zero.**

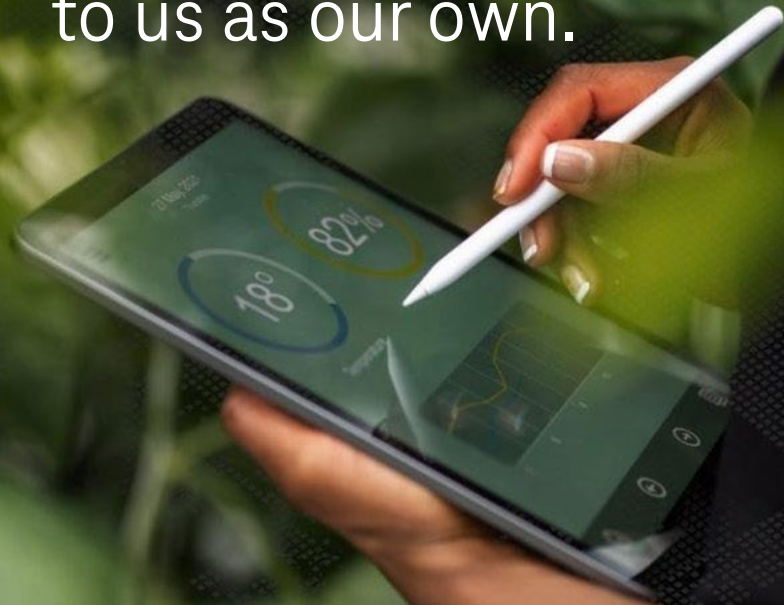
JOURNEY TO CLOUD

Thanks to T-System's Cloud consulting and migration to a public cloud solution, a major pipeline operator was able to **reduce IT costs by 40%.**

SUSTAINABILITY

Through a consolidated, more efficient IT resource capacity utilization, we have **lowered the carbon footprint of Gerresheimer AG by more than 90%.**

Your **sustainability targets** are as important to us as our own.



We offer an end-to-end portfolio on ESG



Positioned as a leader by PAC Analysts and in first-ever ISG Provider Lens™ – Sustainability and ESG services (Europe)

Our sustainability targets

0% Net zero emissions for direct and indirect energy consumption until 2025

100% Sourcing of **renewable electricity** since 2021

0% Net zero emissions (full scope) emission by 2040

100% Full **circularity** for technology and devices by 2030

-55% Reduction in overall emission by 2030

How we can help with your sustainability targets

Our data centers run fully energy efficient



Certified member of **Climate Neutral Data Center Pact**



High-efficiency **LEED-certified** data center Biere



EU Code of Conduct awarded most energy-efficient DC in Europe in 2023

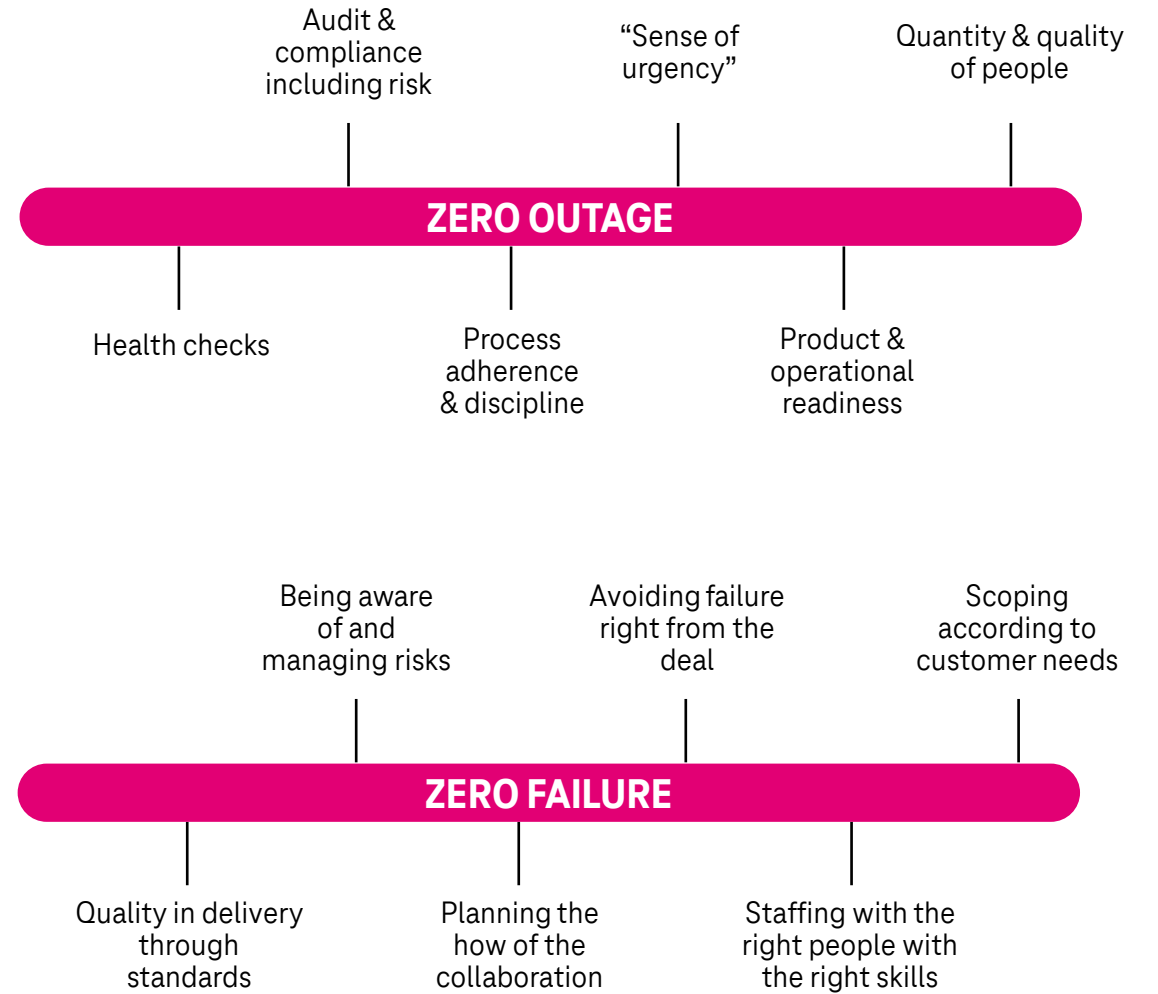
ISG Provider Lens Europe 2023
Sustainability and ESG Strategy and Enablement Services

ISG Provider Lens Europe 2023
Sustainability and ESG Technology Solutions and Implementation Services-IT

ISG Provider Lens Europe 2023
Sustainability and ESG Technology Solutions and Implementation Services-OT



Quality
is the key to
success.

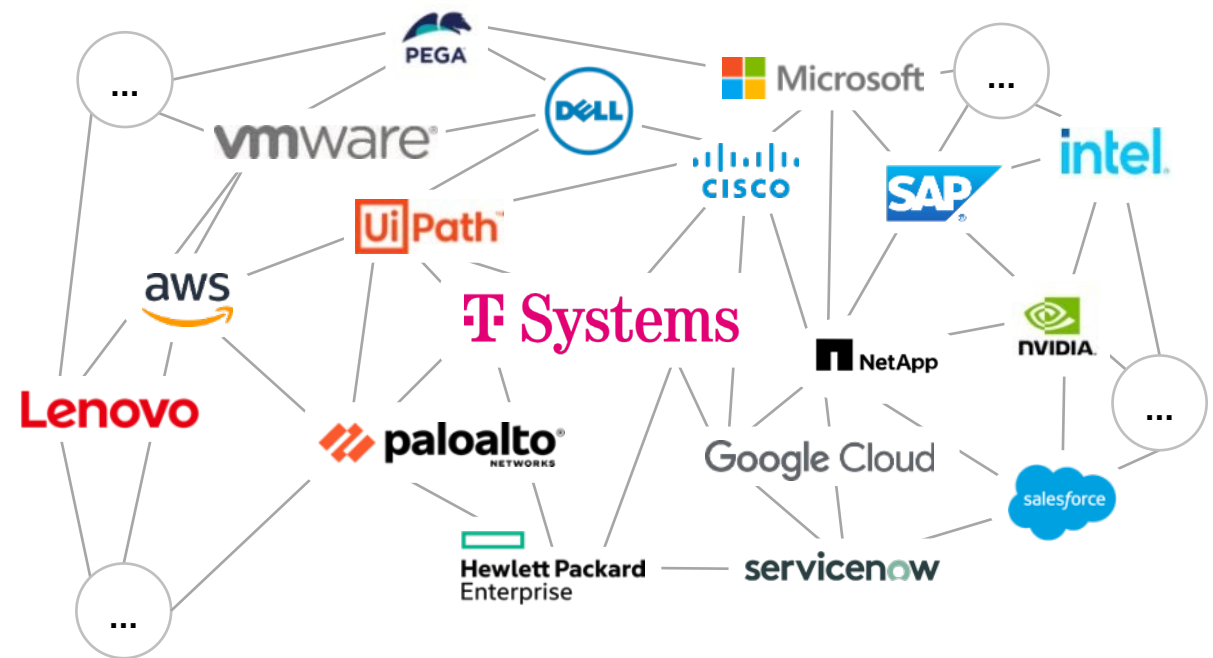


We leverage our **ecosystem of reliable partners** to enable innovative solutions for you.



Our network includes over 500 prominent technology and industry leaders, along with numerous startups.

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





Over **20,000 certified T-Systems experts** dedicate their efforts daily for our customers.

#peoplemakeithappen

EXPERTISE

- Certified experts across industry & portfolio
- Experience and best practice from our worldwide industry projects

T-MINDSET

- Accountable, caring, collaborative
- Client centric
- Performance-driven and growth-oriented

NEW WORK

- Agile framework and methods
- Innovative new work solutions

Products for our
Business Customers

**Telekom
Deutschland**

**Connectivity
& infrastructure**

Security

**ICT-Solutions
& Business Apps**

Cloud Management

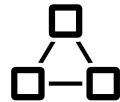
Agile Workplace

Our key facts

We have a strong market position

#1

Market leader
for business customers
In Germany



> 50%

Of German companies work
with our Telekom network

#1

most valuable European brand
most valuable telecommunications
brand in the world



82

TRI*M-points B2B
(Customer satisfaction)

96%

5G Coverage
in Germany



> 80%

of Germany's
„Hidden Champions“
are our customers

We are an essential part of Deutsche Telekom AG



25%
T-Systems

21%
Deutsche Telekom
AG, Europa

**Share of
total business
customer revenue**
of Deutsche Telekom
in Europe (2023)

54%
Telekom Deutschland
Business Customers

TELEKOM DEUTSCHLAND TOTAL*

61.4 mn mobile customers
15.0 mn broadband-connections
€ 25.2 bn revenue
59,709 employees





OF WHICH TELEKOM DEUTSCHLAND BUSINESS CUSTOMERS:

2.4 mn business customers
11,500 employees
€ 8.6 bn revenue

* Annual Report Telekom 2023

We are international – our global coverage for the local needs of business customers

AMERICA




-  USA & Canada
-  Mexico
-  Brazil
-  Argentina



EUROPE

-  Netherlands
-  Luxembourg
-  France
-  Belgium
-  Switzerland
-  Austria
-  Italy
-  Iberia
-  Nordics
-  Greece
-  UK
-  Poland
-  Slovakia
-  Czechia
-  Slovenia
-  Hungary
-  Turkey

ASIA

-  Greater China
-  Japan
-  Singapore

We are also there for our business customers **internationally** – with **local competence** through our employees **on site** and a **worldwide Sales network** which covers the most important business center around the world.

In a nutshell:
We are **Telekom Deutschland
Business Customers**

We are the preferred digitization partner of

2.4 million business customers

our

25,500* experts

take care together with

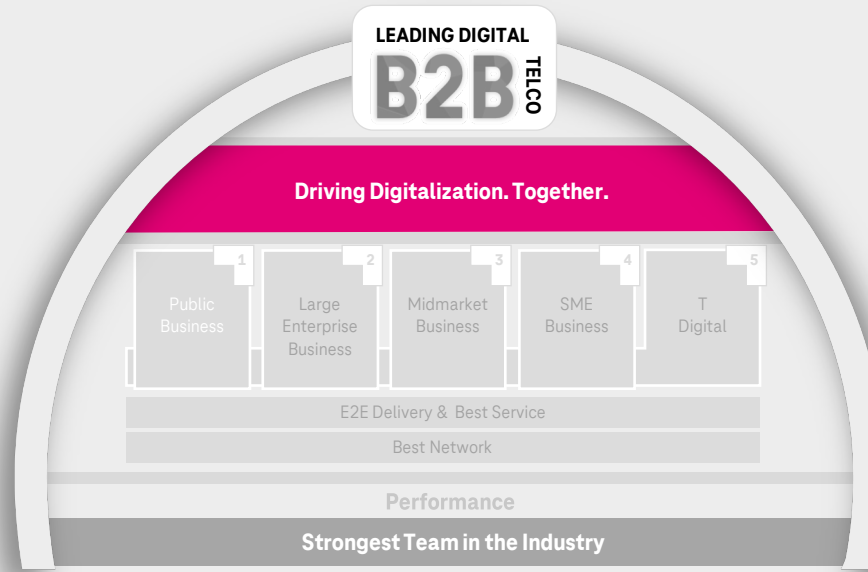
5,500 partners

for

your digitalization



Our Mission



DRIVING DIGITALIZATION. TOGETHER.

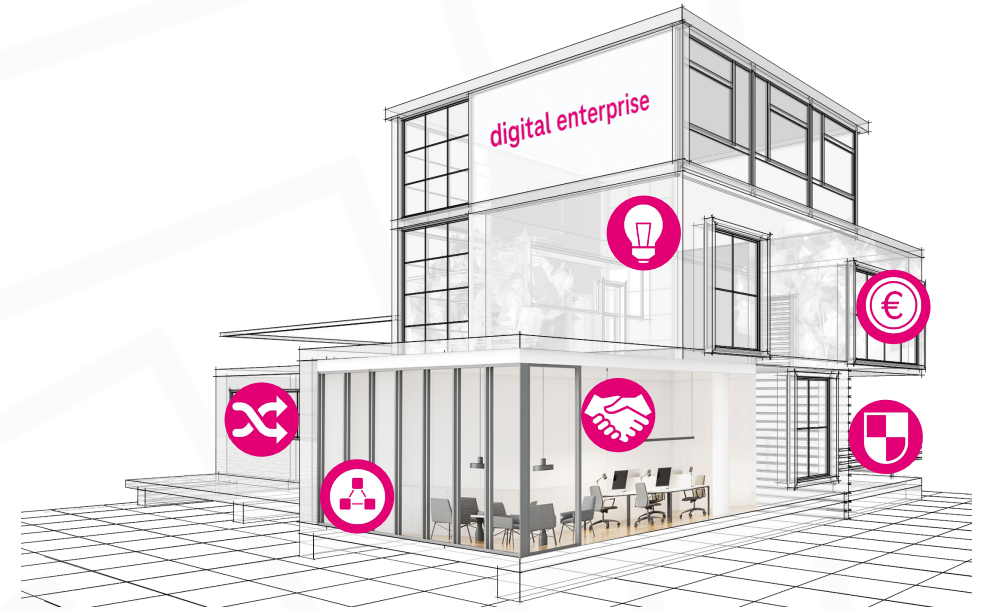
We are **driving** digitalization at the forefront.
We tackle digital challenges with our customers.

We stand for cross-industry **digitalization**
expertise.

As a trusted partner, we develop solutions
together with our customers.

We understand the **needs of our customers**

The customer in focus – it is not just a phrase for us, it is the basis for our actions. The needs of our customers always in sight, we generate sustainable success out of digital innovations for companies and their business models.



Needs:



More sales & service

online, at the point-of-sale and on the go



Enhance collaboration

through Office- and teamwork-solutions



Productive processes

with cloud- and M2M-solutions, Apps and KI



Digital flexibility

in innovations and business models



Ultimate connectivity

on site, between branches and mobile



Reliable IT-security

for networks, data and devices

We make **digitization** **experientable** with **DIGITAL X**

DIGITAL X is europeans leading digitization initiative.

It connects corporates, medium sized companies, startups, politics, visionaries and leading experts in one community. For a sustainable digitization and an **improvement of competitiveness in our country.**



Since it's launch in 2018 **DIGITAL X** has evolved into a mature ecosystem that drives the digitization of German SMEs across a wide range of channels and formats.



2021 – 2023

World Exhibition for Digitalization. Stunning indoor and outdoor stages, numerous brandhouses, marketplaces and the most relevant topics & speakers. In 2021 - 2023, DIGITAL X in Cologne inspired participants. **And in 2024, it will continue - DIGITAL X will be back in Cologne on September 18 and 19!**

2020

Transformation of DIGITAL X into a live and digital platform. Pandemic DIGITAL X EDITIONS in purely digital format plus launch of a dedicated DIGITAL X content platform as the largest best practice and knowledge network in the B2B sector.

2019

More than **35,000 participants** with six regional events and a two-day final at Koelnmesse.

2018

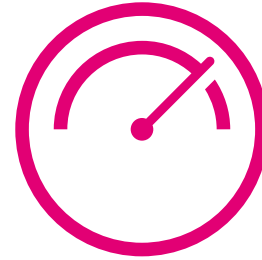
More than **15,000 participants** in total at six regional and national Digital X Live-Events all over Germany.

We drive **digitization** and seize our **initiative**



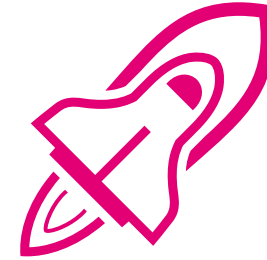
DIGITAL EDUCATION

The **commitment for schools** has a long tradition at Telekom. Our approach is: We digitize Education in Germany until everybody #TAKESPART



TECHBOOST

We've got startups' backs – with powerful technology and the benefits of a partnership that opens the doors to Germany's business customers.

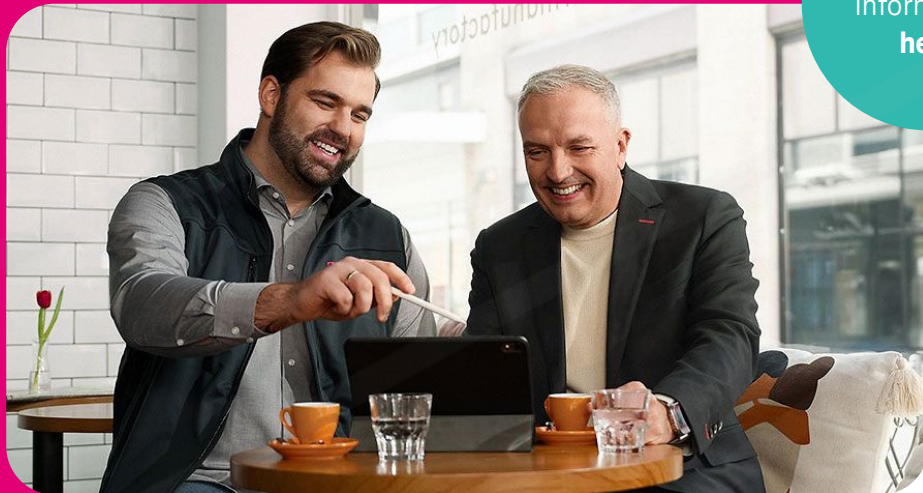


SCHUBKRAFT

We give **orientation in the funding landscape** – for the development of future technologies so Germany emerges stronger from the crisis.

#DeinMeinBusiness

We are personally here for you to ensure everything in your business runs smoothly. Discover how we can support you as well



More
information
here

#DeinMeinBusiness

**The best solutions?
Let's find them together.**

No matter what your business needs, we will find the best solutions for you. We take the time to get to know you and your business personally, learning about your challenges, goals, and requirements. The better we know each other, the better we can help your business thrive. And we do this as a team, together with you. This is what excites us in our campaign **#DeinMeinBusiness**

That's why our consulting is above all one thing: **personal.**

Open to the new

Innovation at Deutsche Telekom



Collaboration


Agility

Focus

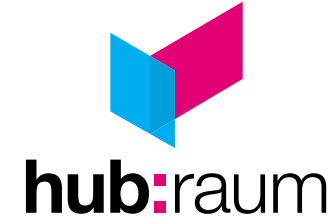
Innovation in cooperation with Partners worldwide



**TECH
BOOST**

Das Startup-
Programm der 

T Capital



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

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



Content

01 Profile

02 Strategy & Transformation

03 Network, Products & Innovation

04 Service & Brand



Award winner
Our service

Digital service

„Telekom hilft“, MagentaApp,
VoiceID, ...

5.6 million

subscriber lines provisioned/
year

25,100

service employees

Best customer service

Example: Germany



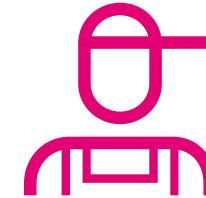
Outstanding customer service

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



Customer service

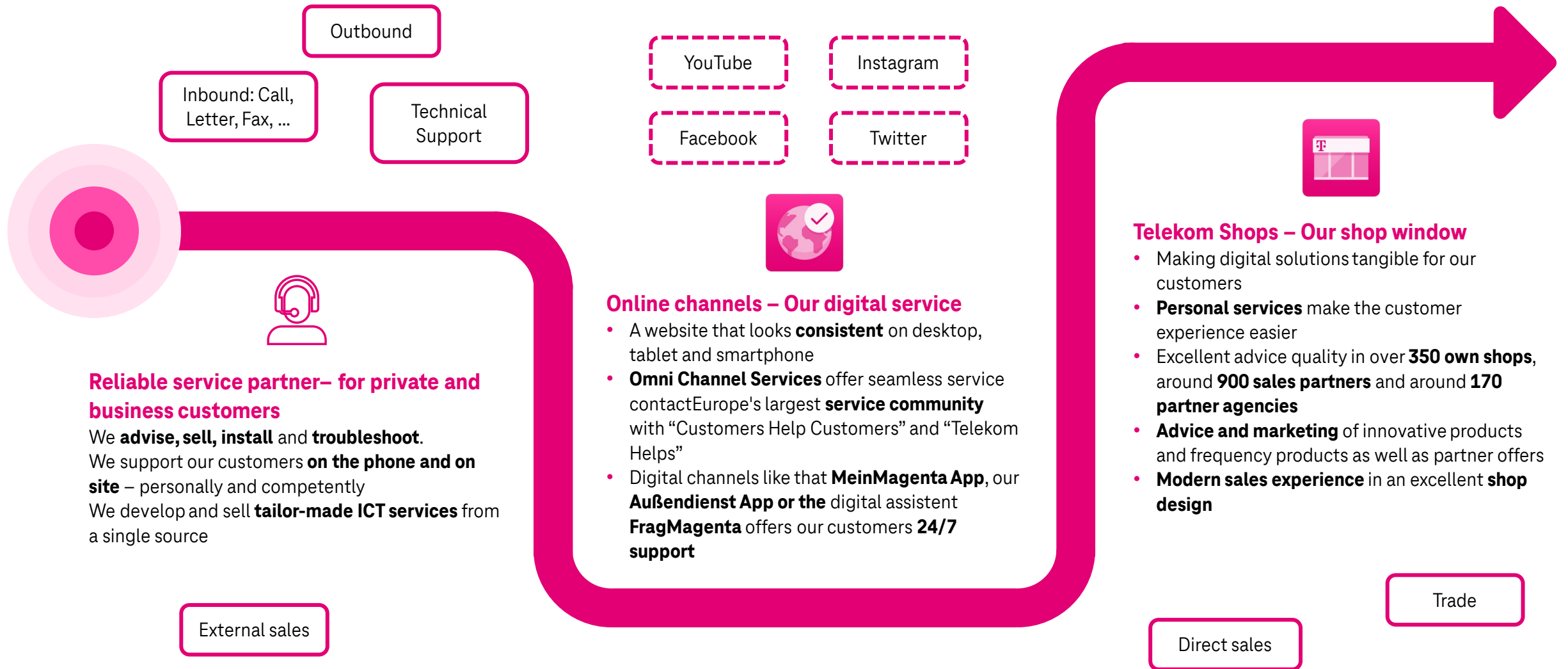
- **33.2 million** phone calls per year
- **9 million** letters/faxes/emails per year
- Customer service in SocialMedia: "Telekom hilft" [Telekom helps] on Facebook and Twitter feedback platform
- Customer service via app: MagentaService app and DSL Hilfe app



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



Reliable service partner– for private and business customers

We **advise, sell, install** and **troubleshoot**.

We support our customers **on the phone and on site** – personally and competently

We develop and sell **tailor-made ICT services** from a single source

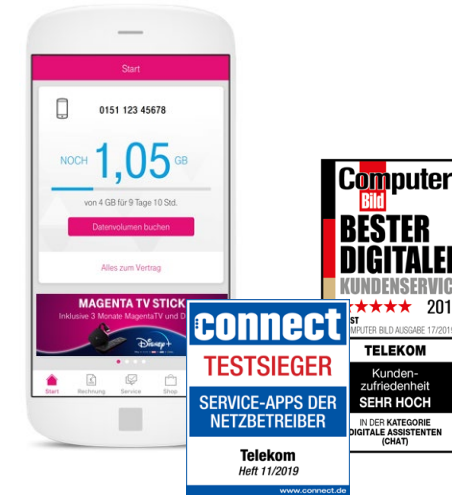
Leading in the sector

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

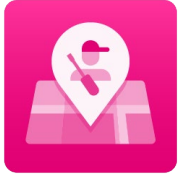


MeinMagenta app

- 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



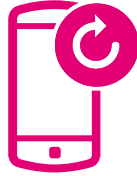
My Telekom technician

- 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



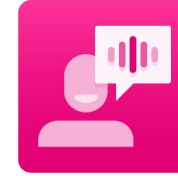
Chatbots

- 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

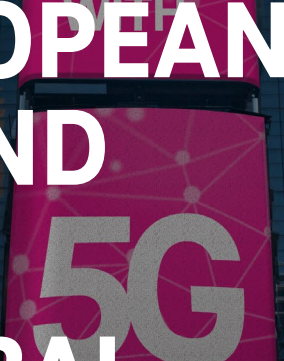
GERMAN BRAND

#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 \$

From 2020
to 2024
+84%

2024
73.3 bn. US \$



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



CONNECTING YOU TO YOUR WORLD



VORFREITE DIE WIR TREFFEN KÖNNEN +++ MOBILEFUNK FÜR TO GO* AUF DIGITAL X: EIN NEUER KOMPAKTER MOBILER SENDEMAST SORGT AUF DER DIGITAL X FÜR GEGEN FLEXIBLE MICRO-CONTAINERS



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