

Deutsche Telekom Company presentation

2025



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

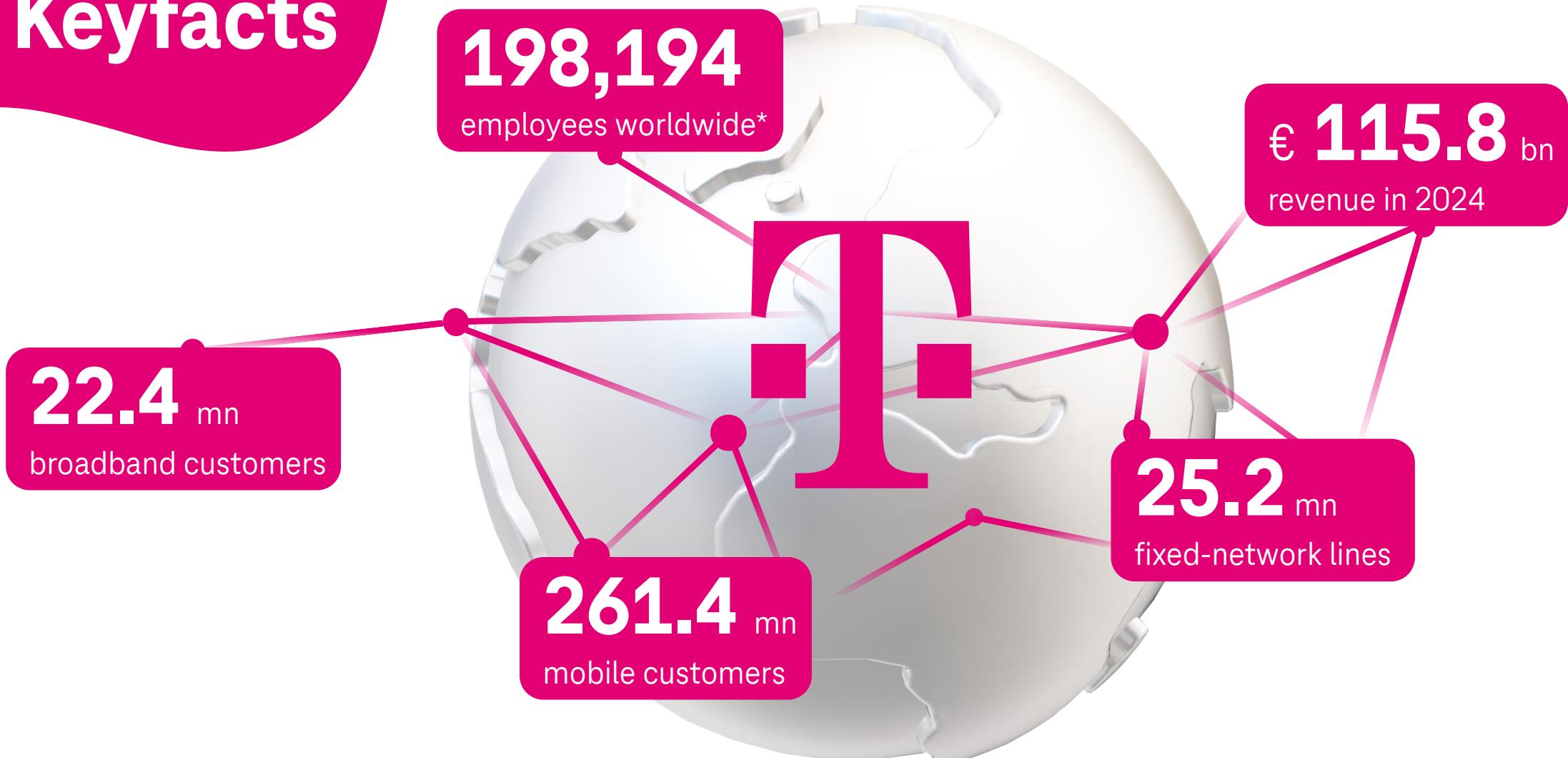
01 Profile

02 Strategy & Transformation

03 Network, Products & Innovation

04 Service & Brand

Our Keyfacts



Figures based on annual report 2024.

* Reporting date December 31, 2024

Deutsche Telekom Profile



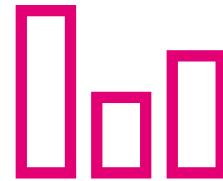
Customers

- **261.4 mn** mobile customers
- **25.2 mn** fixed-network lines
- **22.4 mn** broadband customers
- **9.0 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 **€ 115.8 bn**
- Adjusted EBITDA AL **€ 43.0 bn**
- Free Cashflow AL **€ 19.2 bn**



Employees & responsibility

- Employees worldwide: **198,194** (Reporting date Dec. 31, 2024)
- **4,684** trainees and cooperative degree students
- Pioneer of social issues (climate protection, data privacy, diversity, etc.)

Figures based on annual report 2024.

Germany

Facts & figures



68.6 mn mobile customers

15.2 mn broadband customers

4.6 mn IPTV customers incl. satellite



€ 25.7 bn revenue

€ 10.5 bn EBITDA AL adjusted

57,303 employees (Reporting date Dec. 31, 2024)

74,550 employees in Germany overall
(Reporting date Dec. 31, 2024)

Figures based on annual report 2024.

* Retail

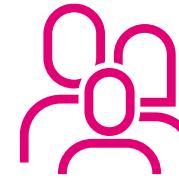
United States & Europe

Facts & figures



Figures based on annual report 2024.

EUROPE



49.7 mn mobile customers
7.2 mn broadband customers
4.4 mn IPTV, satellite, cable customers

T-MOBILE US



129.5 mn branded customers
104.1 mn postpaid customers
25.4 mn prepaid customers



\$ 81,1 bn revenue
\$ 30,9 bn EBITDA AL adjusted
65,154 employees (Reporting date Dec. 31, 2024)

T-Systems

Facts & figures



Figures based on annual report 2024.

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

Pioneer in cloud computing

Corporate customers, multinational corporations &
public sector



€ 4.0 bn revenue

€ 0.4 bn EBITDA AL adjusted

25,691 employees (Reporting date Dec. 31, 2024)

Most valuable German Brand of all time



Most valuable
German Brand
of all time

GLOBAL
TOP 20

#11 of the
most valuable
Global Brands

#1

Most valuable
Telecoms Brand
in the world

Increase Brand Value of **\$ 12 bn** up to

\$ 85.3 Billion

Brand value more than doubled from 2020-2025

+114%

Source: Brand Finance Global 500 - 2025

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 labeling for Group's sustainable products, services and social initiatives (TÜV validated).



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

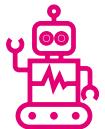
Corporate Responsibility

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.”:

Offers for Competent Media Use (TeachToday), #AgainstHatespeech



AI-Guidelines

Guidelines for the ethical and ecological use of artificial intelligence (AI)



Telekom@School

Subsidized internet access for all general and vocational schools throughout Germany



Educational foundation

projects for young people aged 10-16, 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



74,550 Employees in Germany



4,684 Dual students/ trainees



28.0% women in top/middle management

Figures based on annual report 2024.



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



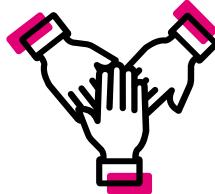
Delight our
customers



Get things
done



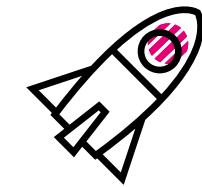
Act with respect
& integrity



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

[linkedin.com/in/timhöttges](https://www.linkedin.com/in/timhöttges)



Dr. Ferri Abolhassan

Board member for T-Systems

[linkedin.com/in/ferriabolhassan](https://www.linkedin.com/in/ferriabolhassan)



Birgit Bohle

Board member for Human Resources & Legal Affairs,
Labor Director

[linkedin.com/in/birgit-bohle](https://www.linkedin.com/in/birgit-bohle)



Rodrigo Diehl

Board member for Germany

[linkedin.com/in/rodrigodiehl](https://www.linkedin.com/in/rodrigodiehl)



Christian P. Illek

Board member for Finance
(CFO)

[linkedin.com/in/christianillek](https://www.linkedin.com/in/christianillek)



Thorsten Langheim

Board member for USA and
Group Development Deutsche Telekom AG

[linkedin.com/in/thorstenlangheim](https://www.linkedin.com/in/thorstenlangheim)



Abdu Mudesir

Board member for Technology and Innovation

[linkedin.com/in/abдумудесир](https://www.linkedin.com/in/abдумудесир)



Dominique Leroy

Board member for Europe

be.linkedin.com/in/dominiqueleroy



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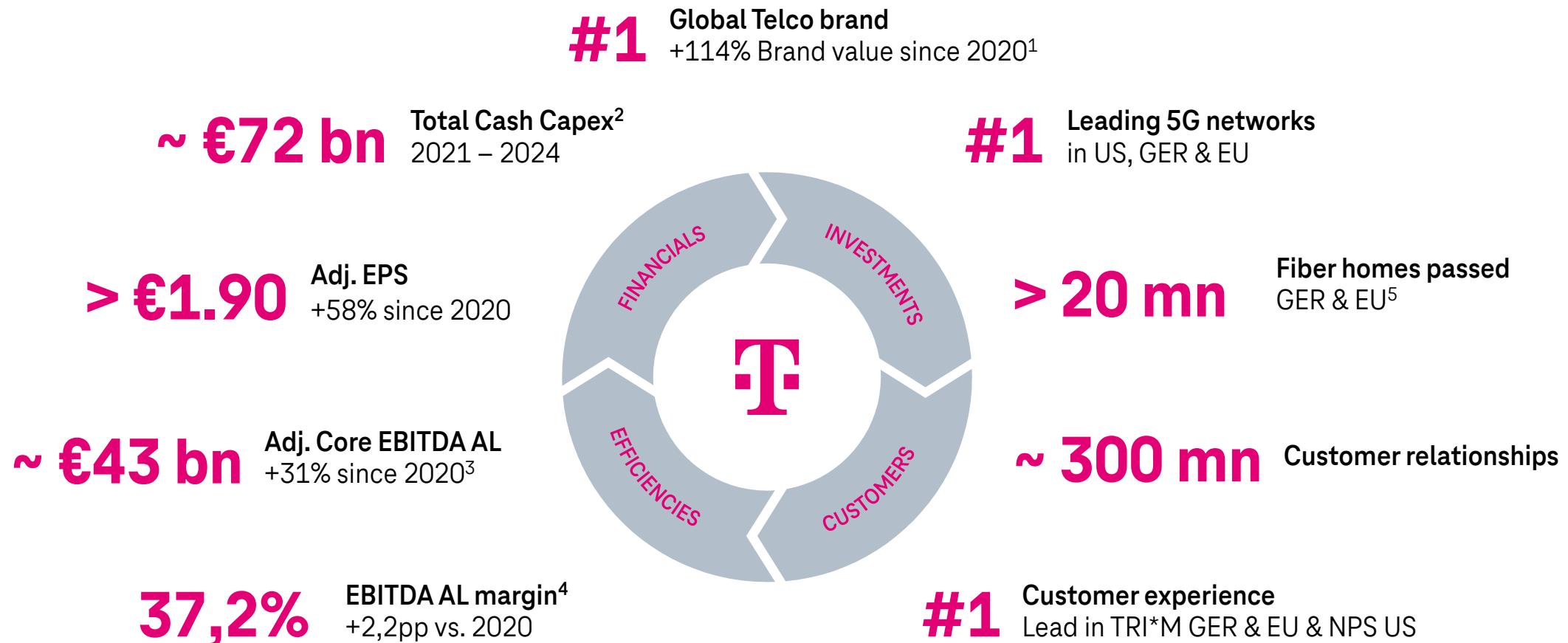
01 Profile

02 Strategy & Transformation

03 Network, Products & Innovation

04 Service & Brand

We are stronger than ever – our flywheel works



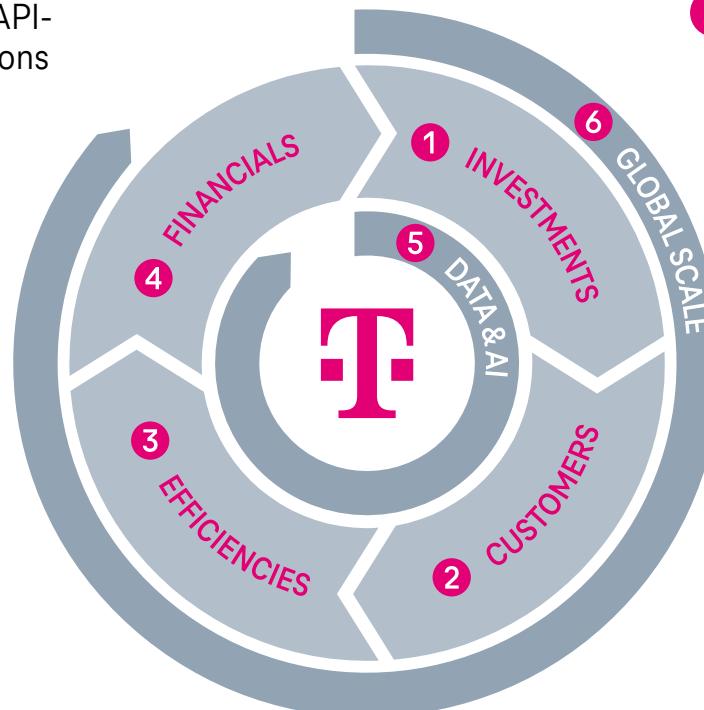
All data end of 2024 except stated otherwise; ¹Brand Finance 01/2025; ²Without spectrum; ³Organic; ⁴adjusted for special factors ⁵GER: FTTH incl. JVs; EU: FTTH/B & Docsis 3.1 (1 Gbps) incl. own, funded & partner rollout but excl. wholebuy

We will accelerate through data, AI and global scale



Our strategy: Leading Digital Telco

- 6 Scale-up with global services, cloudified API-based NT/IT platforms & common operations
- 5 Become a **data-informed, AI-enabled, digital-first** company – **AI@T**
- 4 Maximize **capital returns** to **re-invest** in sustainable growth & deliver superior **shareholder value**



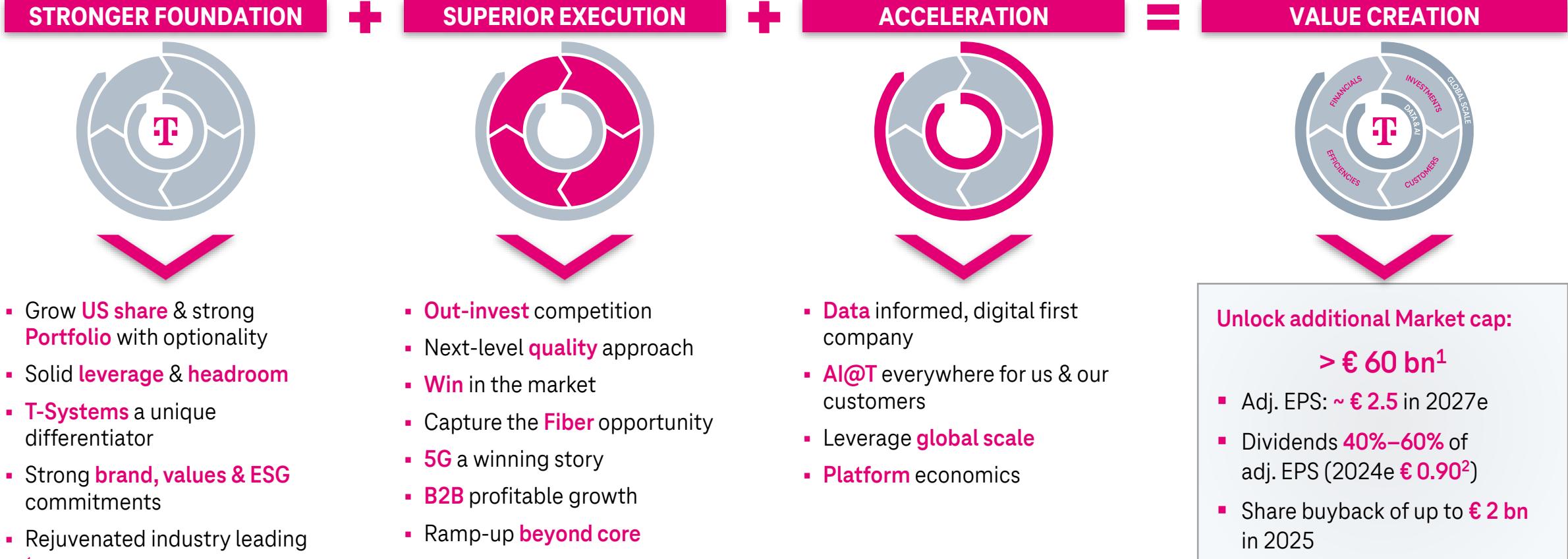
- 1 Differentiate via **leading network experience** – best Fiber, best 5G
- 2 Grow by monetizing **high-quality** networks & services that enhance digital life & business with **Magenta Advantage**
- 3 Increase **productivity & cost efficiency** end-to-end through continuous automation, simplification & modernization



We are **different** – superior brand, unique portfolio, best team, strong values & leading ESG ambitions

Please click here for the all-in-one document of DT's Capital Markets Day in October 2024

We are committed to lead and perform



¹ Until 2027; ² Subject to board resolutions & AGM approval

[Please click here](#) for the all-in-one document of DT's Capital Markets Day in October 2024



Content

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Multi award-winner:

Our best network (Germany)

5G
~96,500
5G antennas

FIBER
800,000 km
fiber-optic cables

Our best network at a glance

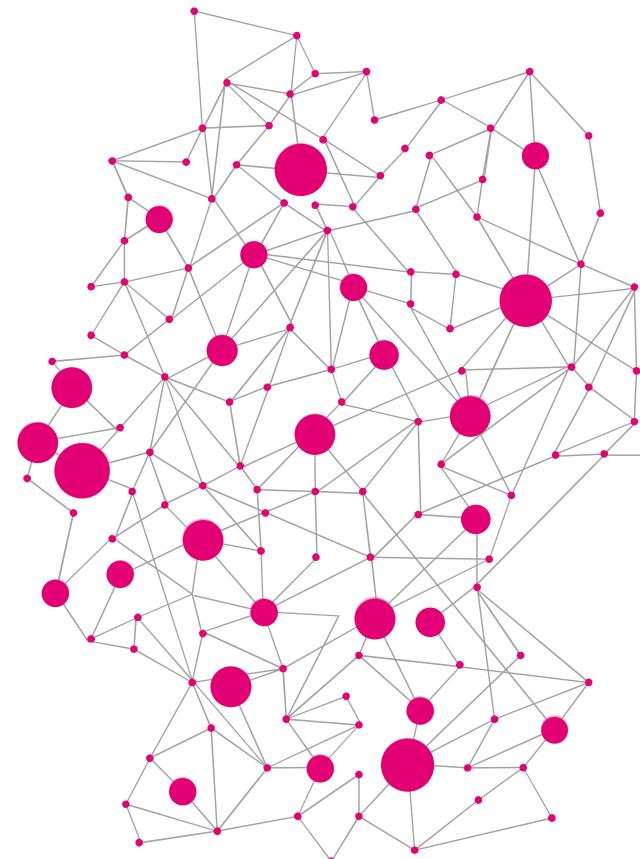
Germany

Fixed network

>800,000 km
fiber-optic cables (end of 2024)

Fiber access available for
10 million households
(end of 2024)

> 36 million households
Tariff up to 100 Mbit or more (Q3/2024)



Mobile network

96 500 5G antennas
(Q3/2024)

98% 5G network coverage
(End of 2024)

99.7%
LTE coverage of population
(Q3/2024)

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



The network of the future is setting the course

Our network expansion

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

Products and services for consumers

Products and services for consumers

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



MagentaMobil

For all those who are family. For roommates and friends. For close and distant relatives – no matter where they live. You can book a suitable additional card for everyone.

The more you are, the cheaper it gets!

And mobile customers receive

1 hour of unlimited data volume in the latest generation of mobile communications.



MagentaEINS

If you combine a fixed network including Internet and mobile communications, you will receive attractive benefits, such as the new Mobile Happy Hour or unlimited data volume.



MagentaTV

More for everyone – entertainment for the whole family: More television, more streaming services and partners, more series and movies. More top-class sport. For at home and on the go.

(as at: Q3 2024)

Magenta Mobil – for everyone who is a family

The more, the cheaper

**JEDEN TAG 1 STUNDE
UNBEGRENZT SURFEN**
EU-WEIT MIT DER MOBILE HAPPY HOUR



Integrative & convergent!
Family & Confidents

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.

Mobile
Happy Hour

Mobile Happy Hour

Our MagentaMobil customers can surf the web for 1 hour per day without restrictions. Customers with MagentaTV on the landline even get 2 hours a day.

(as at: Q3 2024)



Mobile and fixed network incl. internet

Magenta EINS – A one-stop shop



Better price

- Save € 5 per month



Better performance

- At least 1 hour of unlimited surfing every day with Mobile Happy Hour, also for Plus cards
- Unlimited data volume with Magenta Mobil L – also for Plus cards
- Flat rate calls from landlines to all German mobile networks
- MagentaEINS Prepaid: 1 GB data volume on top every month

(as at: Q3 2024)



Welcome to future TV

With MagentaTV, our customers can watch their favorite 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 160 of which are in HD*.



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 RTL+, Netflix, AppleTV+, Amazon, Disney, Sky, WOW and Videoload as well as video and media libraries.



More **flexibility**: Stream exclusive series and movies in HD anywhere and anytime with MagentaTV*: Not only on Deutsche Telekom hardware, but also on tablets, smartphones, smart TVs, Chromecast, FireTV and AppleTV**.



Intuitive operation and everything at a glance



MagentaTV One – Enjoy an outstanding TV experience with MagentaTV and MagentaTV One. Easy installation. Flexible via LAN or WLAN, independent of the Internet provider

* From MagentaTV Smart

** Overview of currently supported devices:

<https://www.telekom.de/magenta-tv-tarife-und-optionen/magenta-tv-mit-app/geraete-uebersicht>

(as at: Q3 2024)



Everything for the Internet at home

Magenta at home

We connect the customer's home for the best experience.



Hightspeed at home

The best connection with the best WLAN and the best service offers TOP Internet speed throughout your home.

Smart home

Use the router and MagentaZuhause app to intelligently network your entire home and control it via smartphone and voice.

Suitable tariffs and offers Our tariffs offer bandwidths for every Internet use. families, high uploads in the home office or for young people.

New: Fast DSL from congstar – permanently affordable, everything in the congstar app

Fiber optics – fast, stable and future-proof

Surfing with up to 2,000 Mbit/s is easily possible in the modern T-fiber optic network.

Hybrid 5 G

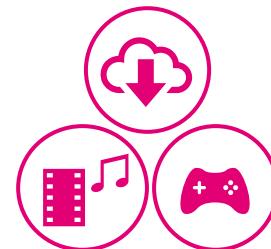
Fast Internet even where the fixed network does not offer enough power. Hybrid interconnects fixed network and mobile bandwidth to offer high bandwidths.

(as at: Q3 2024)

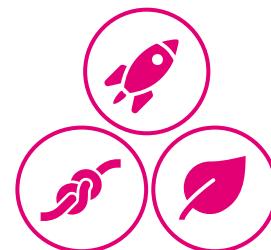


Lifeline of the digital society

= T = Fiber to the Household (FTTH)



Only FTTH offers sufficient performance for the intensive data consumption of today and tomorrow



No other network is more powerful, more stable or more energy-efficient



Every house, every school and every business
Connecting

(as at: Q3 2024)

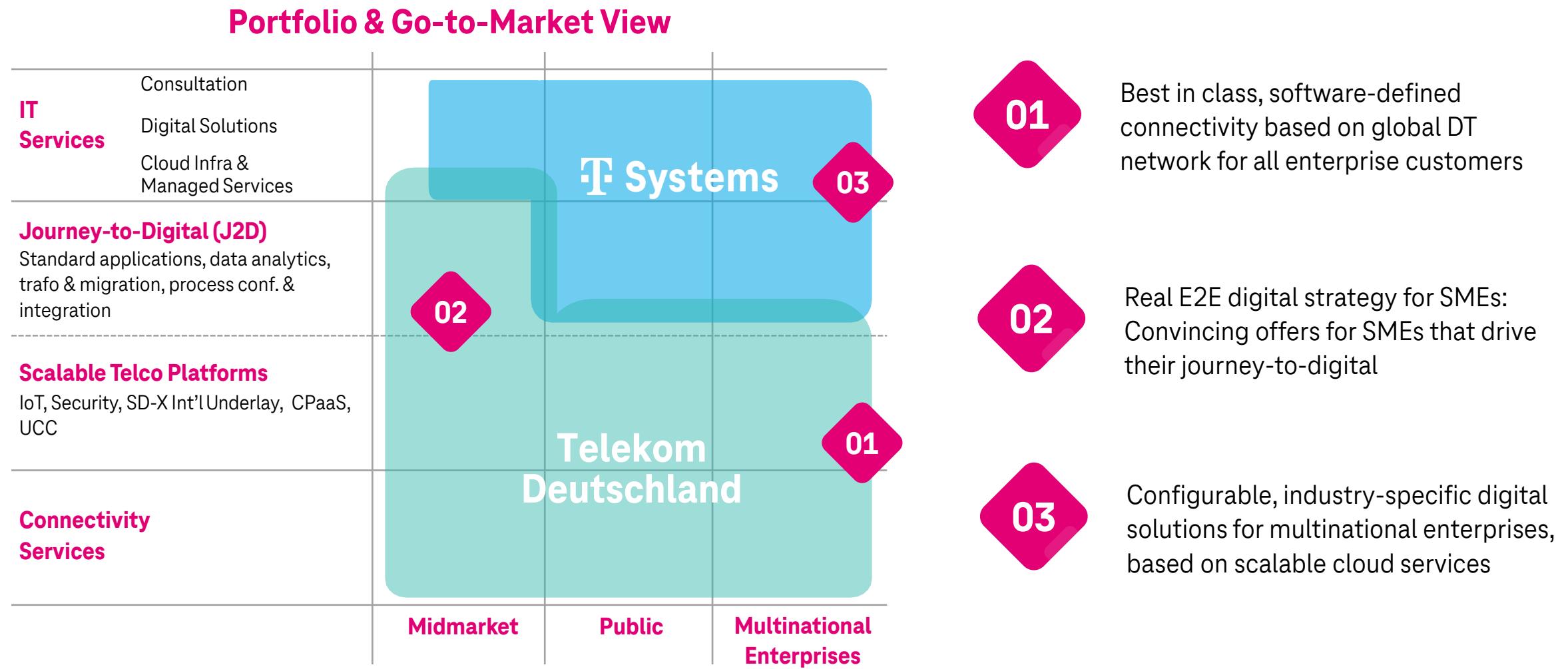
Products for our
Business Customers



**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.

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



Products for our
Business Customers

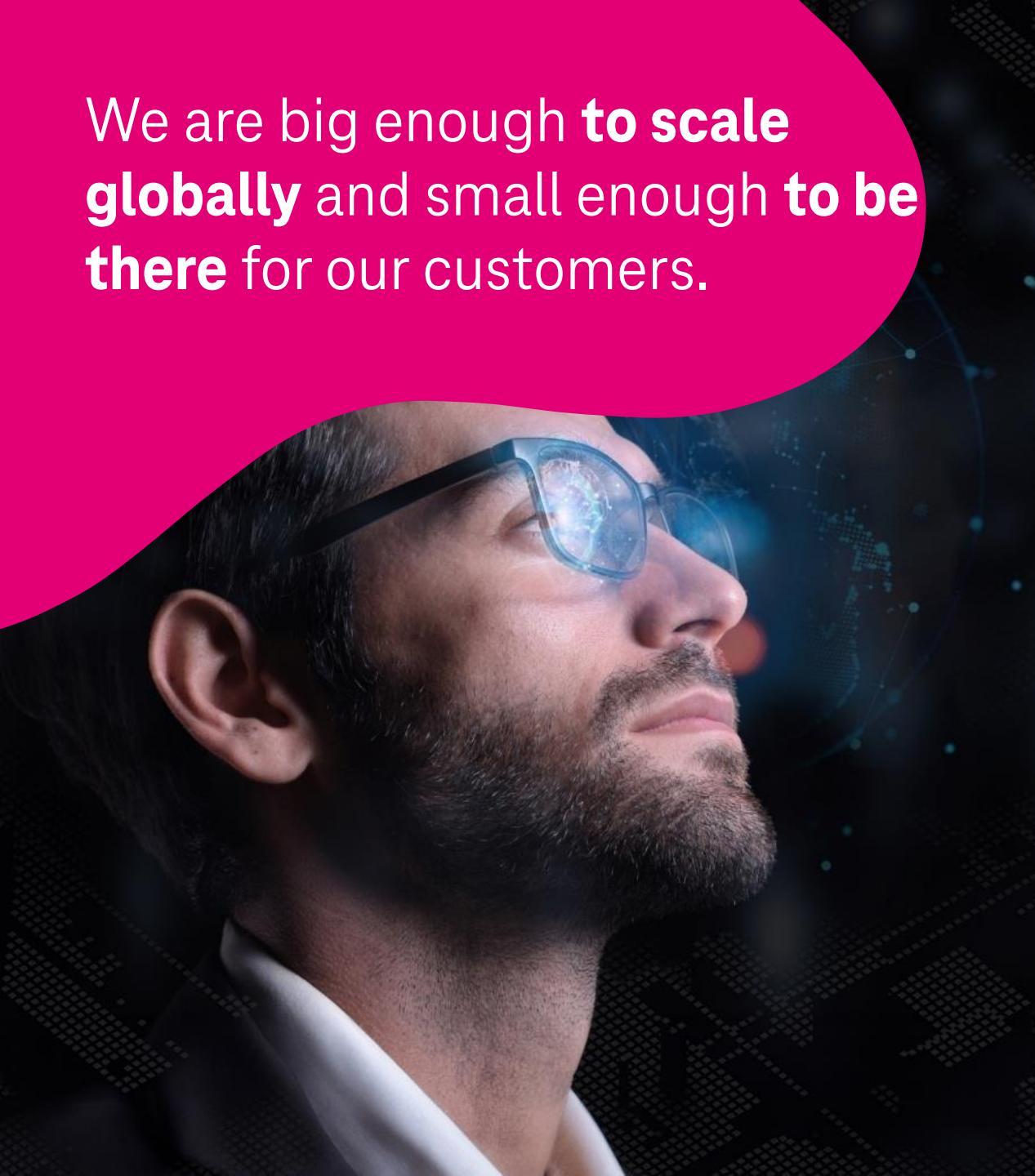
T- Systems

Security

Advisory

Digital

Cloud Services



We are big enough **to scale**
globally and small enough **to be**
there for our customers.

About T-Systems

#1 **IT Service Providers**
in Germany & #2 in DACH

- € 4.0 bn** **Revenue growth with +2.8% in 2024**
- 8** **Security Operation Centers (SOCs)** that operate globally
> Defend against 36 million cyberattacks per day.
- 26** **Countries** in USA, LATAM, Europa & Asien
- > 500** **Leading technology partners** and providers
- > 1.000** **Case studies**
- 26.000** Employees including
> 20.000 certified experts

We partner with you on
your journey into a **modern,
secure, and resilient digital
environment** along the
E2E digital value chain.



Our set-up



7 Focus
industries



Global Delivery Network
with **26** countries



1 German
frontend

Advisory (Detecon)

Digital

Cloud

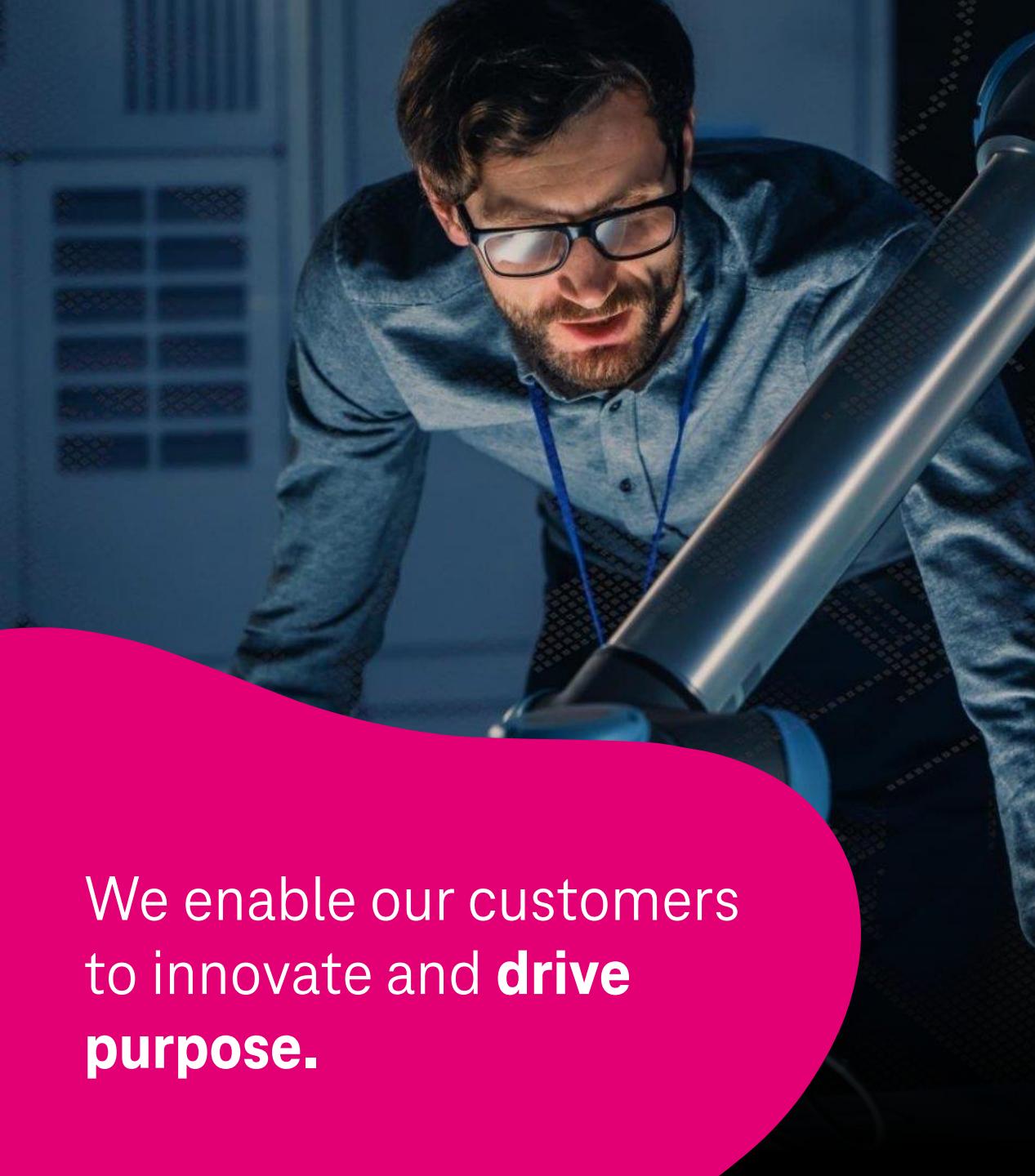
Security

Connectivity

 Plan

 Build

 Run



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



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

Digitization & Monetization
Transformation & Modernization
Security & Compliance

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



Retail & Logistics



Financial 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.

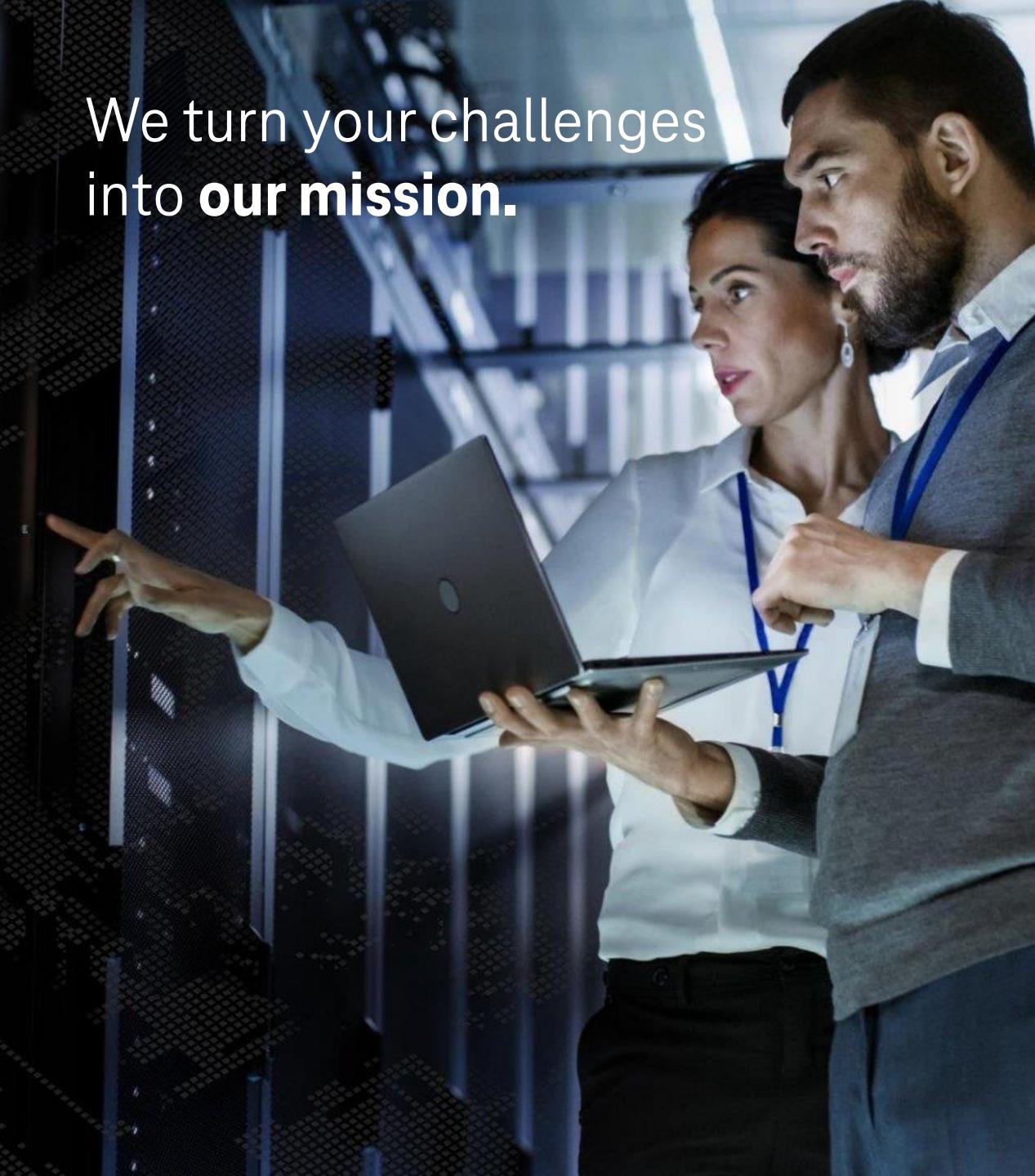
Christian Eigler, Corporate CIO at Continental AG

“ 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

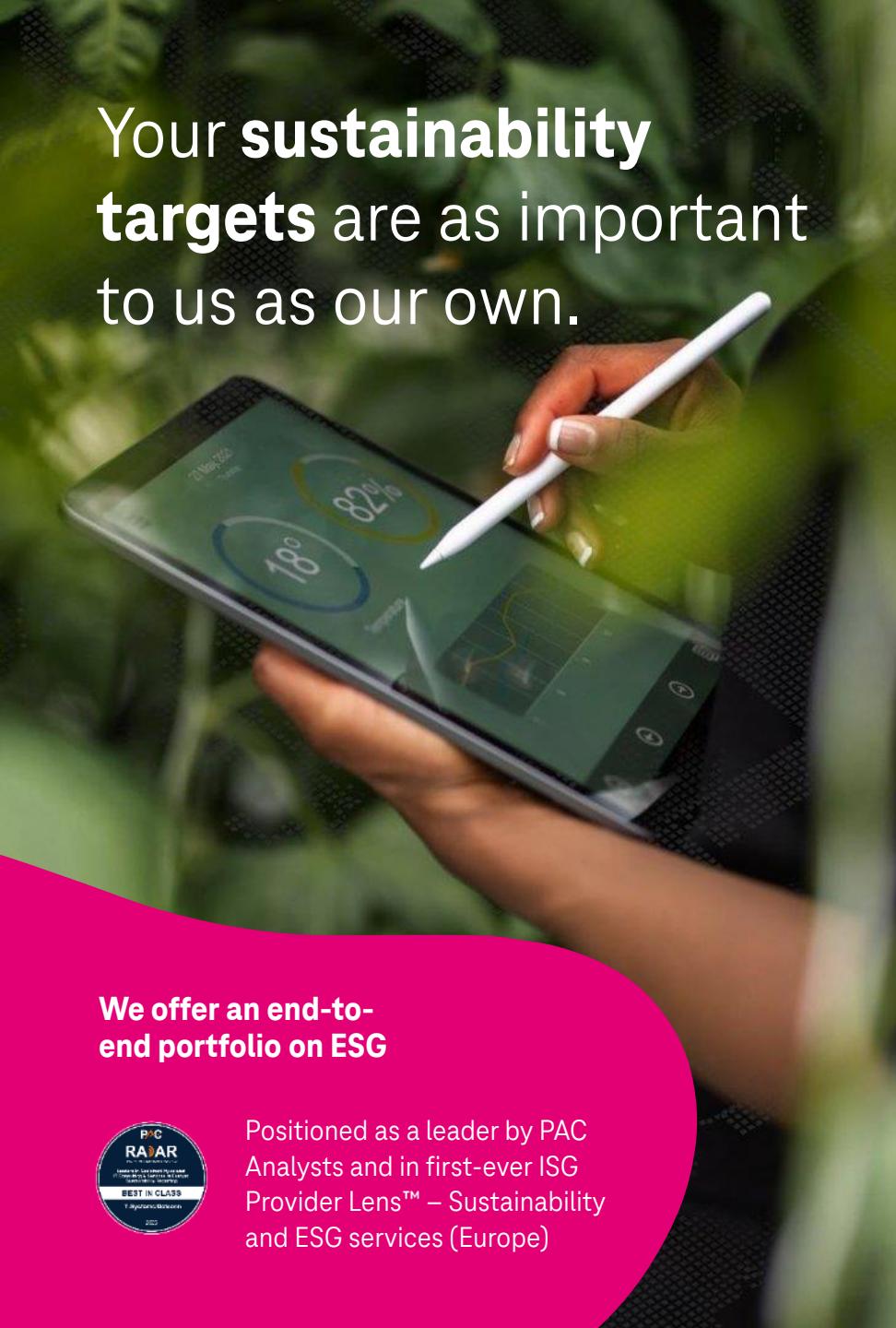
We provided a rapid resolution of incidents and minimization of downtime costs for a logistics giant through AI based solutions. This **reduced the incidents at our customer to zero.**

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

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

-55% Reduction in overall emission
by **2030**

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

100% Full **circularity** for technology
and devices **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™
Sustainability and ESG
Strategy and Enablement Services

Europe 2023

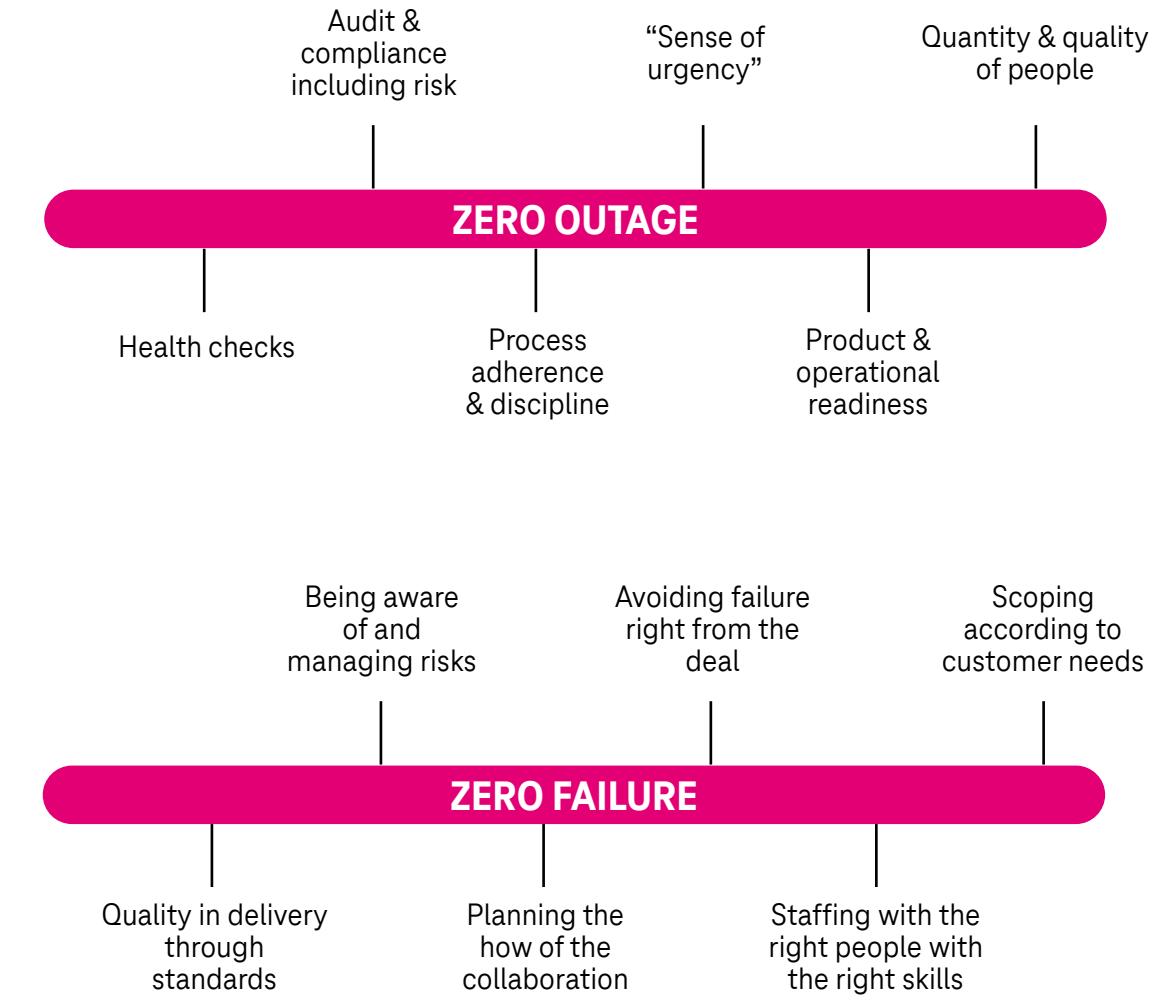
ISG Provider Lens™
Sustainability and ESG
Technology Solutions and Implementation Services-IT

Europe 2023

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



Quality
is the key to
success.

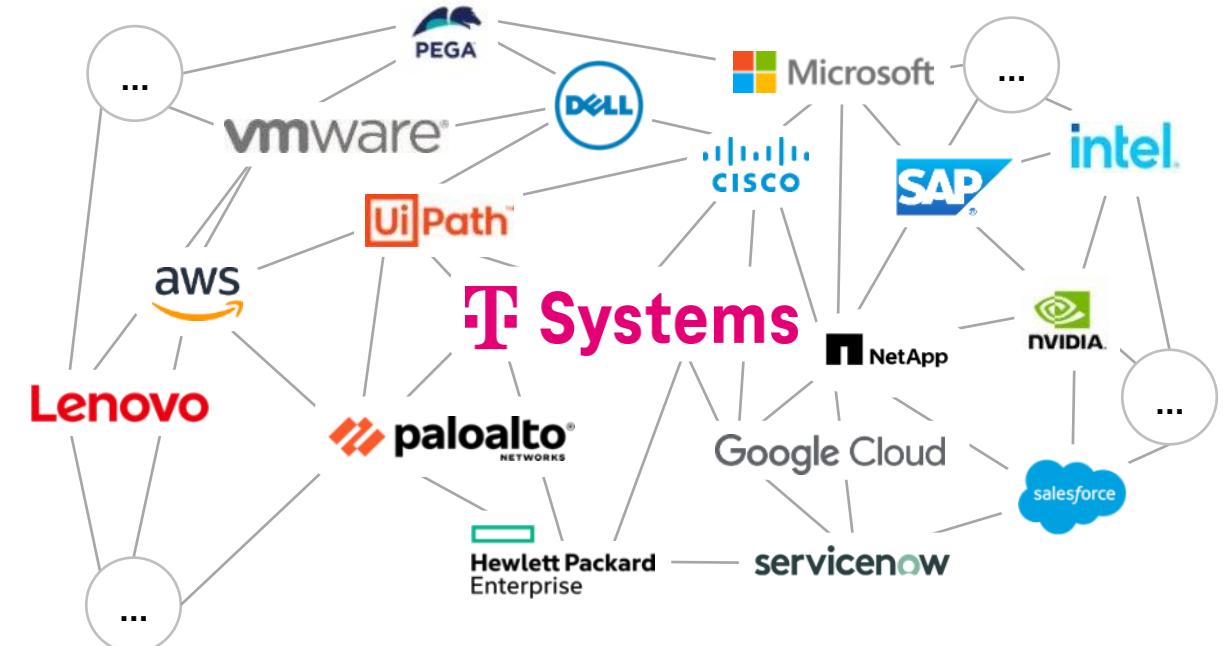


We leverage our **ecosystem of reliable partners** to enable innovative solutions for you.



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 **26,000 engaged experts** with their passion and skills, are ready to provide leading edge digital solutions for you.

#peoplemakeithappen

PASSIONATE & SKILLED PEOPLE

- We have the best digital experts: 20.000 certified experts, 10.000 future skills in Cloud, Digital, Infrastructure and Security. 800 AI Experts, 800 IT Architects, 700 Scrum Masters, 300 Agile Coaches.
- We invest 8% of our EBIT in trainings and we are DACH winner for Excellence in Learning and Development.
- We offer expertise in running first class projects worldwide across our industries and portfolio.

OUR VALUES

- We are 26.000 people in 27 countries from different backgrounds: We firmly believe that a culture of diversity and inclusion creates an environment in which the best customer experience will be achieved.
- We value and foster a collaborative culture where everyone can bring in their knowledge, ideas and opinions. #oneTeam

TALENT MAGNET

- T-Systems is a place for people to grow and develop. We create a true people experience. We listen to and care about our people.
- We are Top Employer in Germany and in core markets.

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

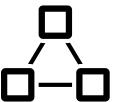
#1

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



84

TRI*M-points B2B
(Customer satisfaction)

98%

5G Coverage
in Germany



> 80%

**of Germany's
„Hidden Champions“**
are our customers

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

We are the preferred digitization partner of

2.5 million business customers

our

25,500 experts

take care together with

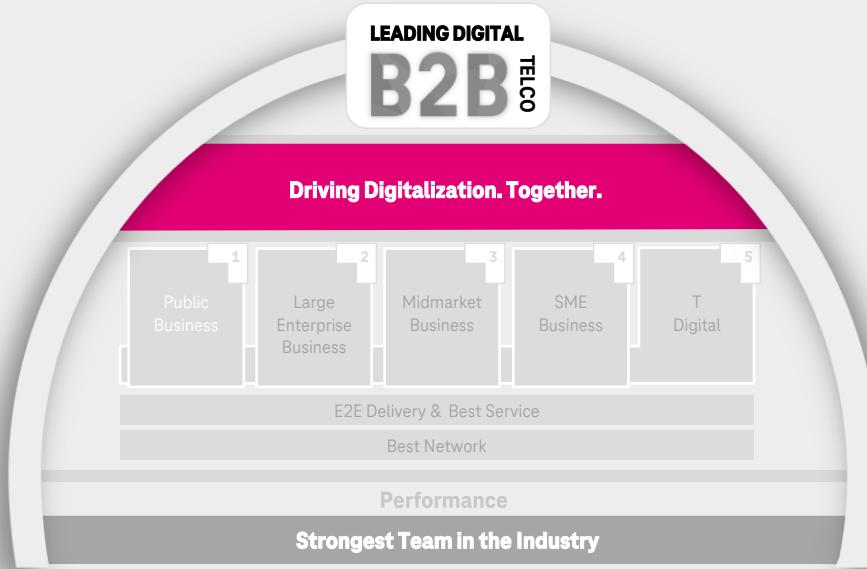
5,500 partners

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.

Our broad business portfolio **makes our customers successful in the digital world**



AI



Digitization
projects



Industry
Know-how

Applications

e.g.  

Infrastructure & Cloud Management

e.g.  

Security

e.g.  Identity Management
 Industrial Control Systems
 SOC

Network & connectivity

e.g. Managed SD-Networks
FTTH Global WAN IoT



Achieving more together:

With strong partners, we enable an even broader spectrum in digitalization































































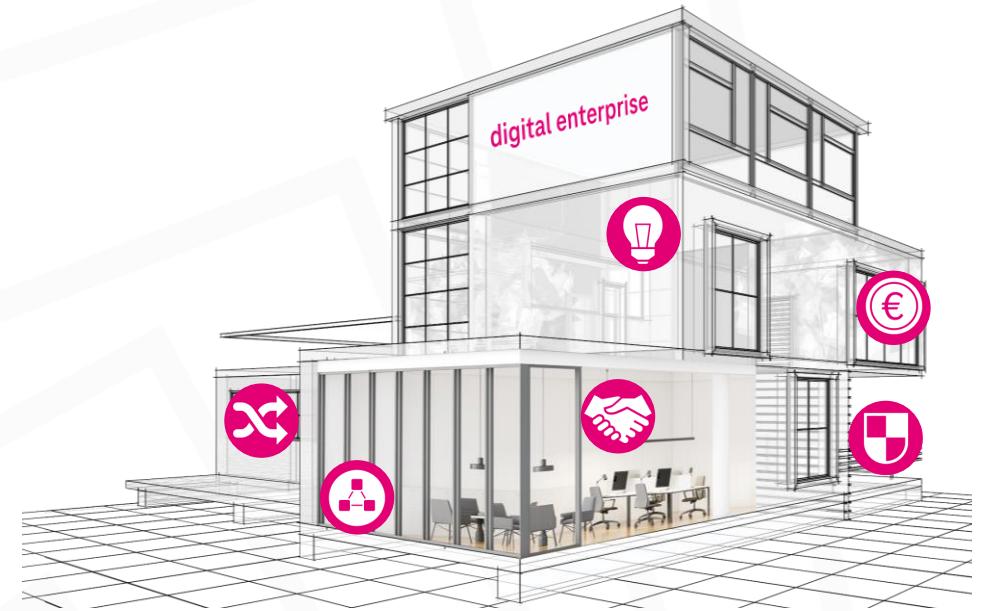






We understand the **needs of our customers**

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

With **DIGITAL X** we are making Digitization tangible

DIGITAL X is Europe's leading cross-industry digitization initiative. With its ambition to drive digital transformation in business, politics and society, Deutsche Telekom brings together corporations, SMEs, start-ups, politicians, visionaries and leading experts in an overarching community. **With the declared goal: to create tangible impetus for Europe's digital agenda and to take action together. For sustainable digitalization and strengthened competitiveness.**



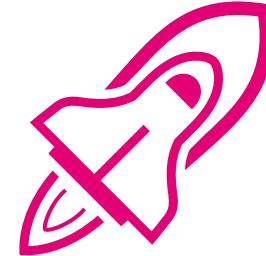
digital-x.eu



The success story of the **DIGITAL X**

„How can digitization advance companies and how do we support them in doing so?“ This question gave the impetus to launch the initiative in 2017. Whether you are a digitization beginner or a professional, a start-up or a DAX corporation, best practice sharing or expert discussion, there is still one motive that unites all guests, partners and speakers at DIGITAL X: Networking, exchanging, learning from each other – tackling digitization together.

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

**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**.

#DeinMeinBusiness

Open to the new

Innovation at Deutsche Telekom



Collaboration

Agility

Focus

Innovation in cooperation with Partners worldwide



**TECH
BOOST**
Das Startup-
Programm der
T

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

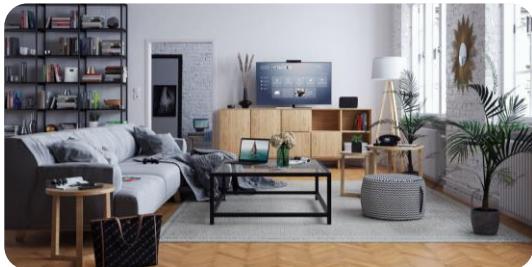
short term

long term

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, Ask Magenta ChatBot, ...

80 million

personal customer contacts per year

25,000

service employees

Our claim: The beste sales & service

Cross-channel, digital and personal



Reliable service partner for private and business customers

- Around 25,000 people provide around 80 million personal customer contacts in the year for the best customer experience
- We **advise, sell, install** and **troubleshoot**
- We **support** our customers on the phone and in the shop – personally and competently
- We develop and sell **tailor-made** ICT solutions from a single source
- We are a **leader in service** – confirmed by independent tests by Connect, CHIP, etc.



Onlinechannels Our digital service

- Digital touchpoints (e.g. messaging, social media) offer seamless service contact
- Omni-channel services through shops, outbound and field service
- Europe's largest service community with "Customers help customers" and "Telekom Helps"



Telekom Shops Showcase for private and business customers

- Excellent consulting quality and **first-class service experience** in 1,000 shops
- Consulting and marketing of **innovative products** and frequency products as well as **partner offers**
- **State-of-the-art sales support** in an excellent and sustainable shop design
- As hosts, we use personal services to make the **customer experience** more attractive and easier

(as at: Q3 2024)



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, messaging, 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 **digital service offerings** received **1st place** in the chip test in all four business segments: Mobile Communications, DSL & Fixed Network, Hosting and TV/VoD Provider



Ask Magenta ChatBot

- Our **chatbot Ask Magenta** is the best in the industry and won **1st place** for the 6th time in a row in the test series **"Computer Bild"** and **"ServiceAtlas"** and **was rated "very good" in all five categories**



(as at: Q3 2024)

Digital offers 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



Appointment Scheduling Service

- Our customers can conveniently arrange for a postponement in the deployment process via self-service
- The customer automatically receives a confirmation of his new appointment by SMS or e-mail



Chatbots

- Our digital service assistants answer customer queries quickly, simply, and around the clock
- Accessible via browser, in the MeinMagenta app or via WhatsApp



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



Telekom Think Tank

We develop and improve our services, products and processes together with our community.

To this end, we conduct surveys and workshops with private and business customers as well as non-customers.

(as at: Q3 2024)

Profile

Strategy & Transformation

Network, Products & Innovation

Service & Brand



63



Focus on Customers and Partners

Private Customers, Business Customers, Wholesale

As a pioneer of digitalization, we offer our customers an individual service and product portfolio.



Private Customers

We **inspire** our customers with **individual offers** in the **best network**. With **high-performance tariffs** and **innovative products** from the fixed network, mobile communications and TV.



Business Customers

We are market leaders because our customers trust our **quality, performance and safety**. We offer **tailor-made products** and solutions in the best network and drive digitization forward with **innovative IT**, cloud and security solutions as well as **IoT and AI applications**.



Wholesale

We offer our customers access to the **best network** via **infrastructure** and **upstream services** – from the local loop to the **individual carrier solution**.

(as at: Q3 2024)

MAGENTA MOMENTS – OUR Customer Loyalty Program

We turn customers into fans



- ✓ Exciting & constantly changing **partner benefits**
- ✓ Exclusive access to **events** and **great competitions**
- ✓ Real Telekom advantages
- ✓ Attractive **gifts** without hooks & hidden subscriptions



» Loyal customers become fans when enthusiasm meets commitment – with our digital platform, we create real added value for customers and partners.

(as at: Q3 2024)

MOMENTS-USER
with **4X** higher rNPS

Moments

39

In App

26

No App

10

Our brand



Our brand

#1
#1
#11

EUROPEAN
BRAND
TELECOMS
BRAND
5G
GLOBAL
BRAND



The World's 25 Most Valuable Brands 2025

#1	Apple	#2	Microsoft	#3	Google	#4	amazon	#5	Walmart
	Apple \$574.5 bn +11%	Microsoft \$461.1 bn +35%	Google \$413.0 bn +24%	Amazon \$356.4 bn +15%					
#6	SAMSUNG	#7	TikTok	#8	facebook	#9	NVIDIA	#10	STATE GRID
	Samsung Group \$110.6 bn +11%	TikTok/Douyin \$105.8 bn +26%	Facebook \$91.5 bn +21%	NVIDIA \$87.9 bn +98%					
#11	Deutsche Telekom	#12	Instagram	#13	ICBC	#14	China Construction Bank	#15	verizon
	\$85.3 bn +16%	\$79.9 bn +14%	ICBC \$79.1 bn +10%	China Construction Bank \$78.4 bn +19%					
#16	中国农业银行	#17	THE HOME DEPOT	#18	Toyota	#19	Bank of China	#20	KWEICHOW MOUTAI GROUP
	Agricultural Bank of China \$70.2 bn +16%	Home Depot \$65.1 bn +23%	Toyota \$64.7 bn +23%	Bank of China \$63.8 bn +27%					
#21	ORACLE	#22	United Healthcare	#23	Mercedes-Benz	#24	AT&T	#25	Allianz
	Oracle \$57.4 bn +8%	UnitedHealthcare \$54.2 bn +14%	Mercedes-Benz \$53.0 bn -11%	AT&T \$52.5 bn +7%					

Brand Value

\$ 85.3 Billion
+114% from 2020 to 2025

Brand Value Global 500 2025
by Brand Finance plc, London

2007
8.5 BN USD

Source: Brand Finance Global 500

T

85.3
BN USD

verizon[✓]

72.27
BN USD

AT&T

52.53
BN USD

orangeTM

17.88
BN USD

vodafone

12.09
BN USD

O₂

5.84
BN USD

A photograph of two women laughing together. The woman on the left has dark curly hair and is wearing a red top. The woman on the right has blonde hair and is wearing a striped shirt, holding a smartphone. They are outdoors with a blue sky and clouds in the background.

Unsere Überzeugung

We are digital optimists.

CORE BELIEF

Global
Brand –
Global
Vision



Unsere Mission

T – the strongest
connection of people.

ROLE OF THE BRAND

Global
Brand –
Global
Vision

A photograph of a smiling couple, a Black woman with curly hair and a Black man with a mustache, hugging and looking at a smartphone together. They are in a modern, well-lit space with large windows and a high ceiling.

Purpose

We won't stop until everyone is connected.

PURPOSE

Global
Brand –
Global
Vision

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
YOUR
WORLD

... VORBEREITET, DAS WIR TREFFEN KÖNNEN. MOBILFUNK AST TO GO! AUF DIGITAL X: EIN NEUER KOMPAKTER MOBILER SENDEMAST SORGT AUF DER DIGITAL X FÜR SICHE



Deutsche Telekom AG
Friedrich-Ebert-Allee 140
53113 Bonn