



DEUTSCHE TELEKOM COMPANY PRESENTATION



LIFE IS FOR SHARING.

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 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.

DEUTSCHE TELEKOM COMPANY PRESENTATION

OVERVIEW

- 01** Deutsche Telekom
- 02** Strategy & Transformation
- 03** Network, Products & Innovation
- 04** Service & Brand

DEUTSCHE TELEKOM PROFILE

Customers & Markets



Customers

- **178.4 mn** mobile customers
- **27.9 mn** fixed-network lines/
20.2 mn broadband lines
- Approx. **8.2 m** TV customers



Markets

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

Facts & Figures



Telekom in figures, 2018

- Revenue **€ 75.7 bn**
- Adjusted EBITDA **€ 23.3 bn**
- Free Cash-Flow **€ 6.2 bn**

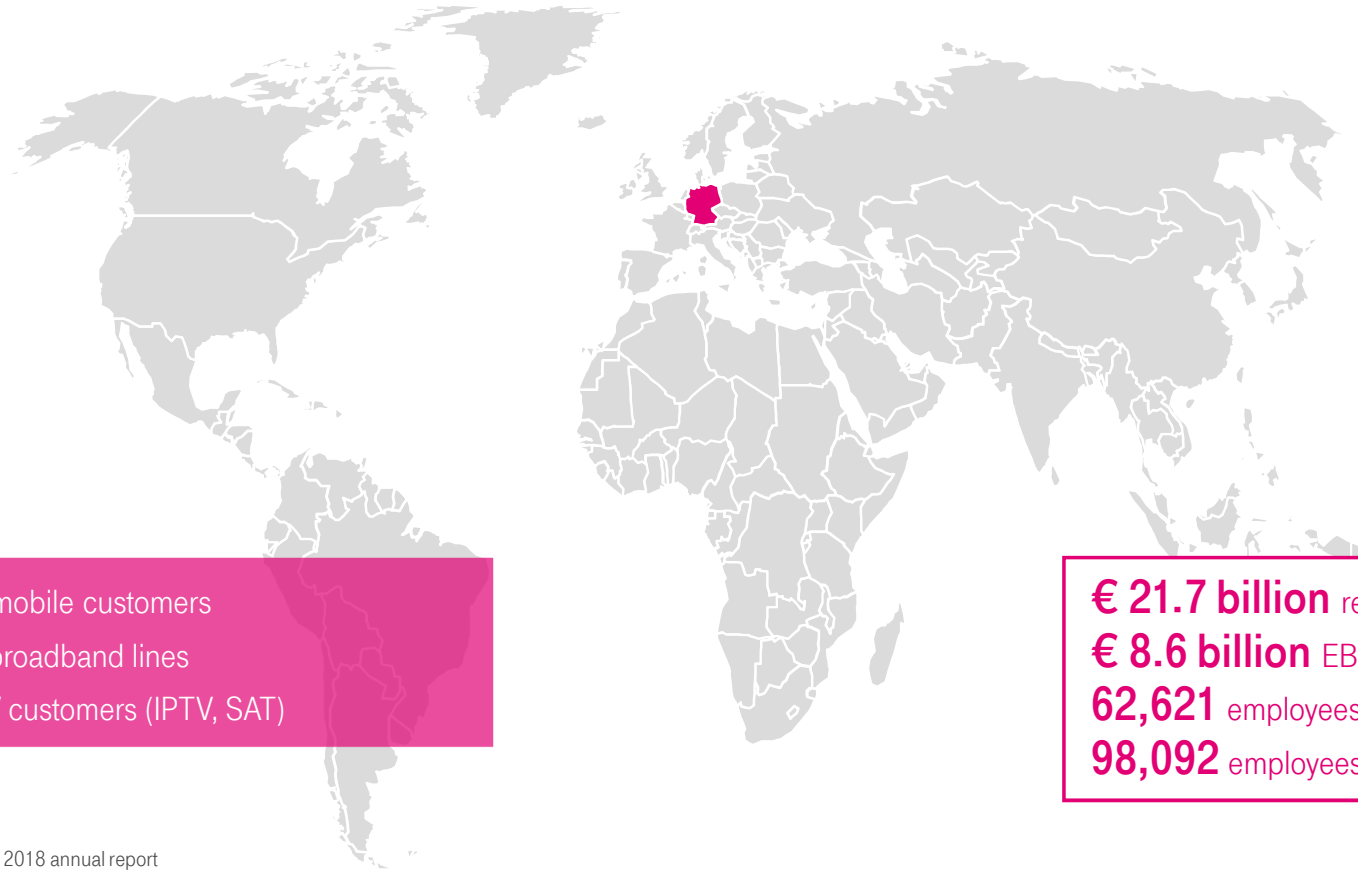


Employees & responsibility

- Employees worldwide: 215,675
- 5,713 trainees and cooperative
degree students in Germany
- Pioneer of social issues
(climate protection, data privacy,
diversity, etc.)

Source: DT 2018 annual report

GERMANY



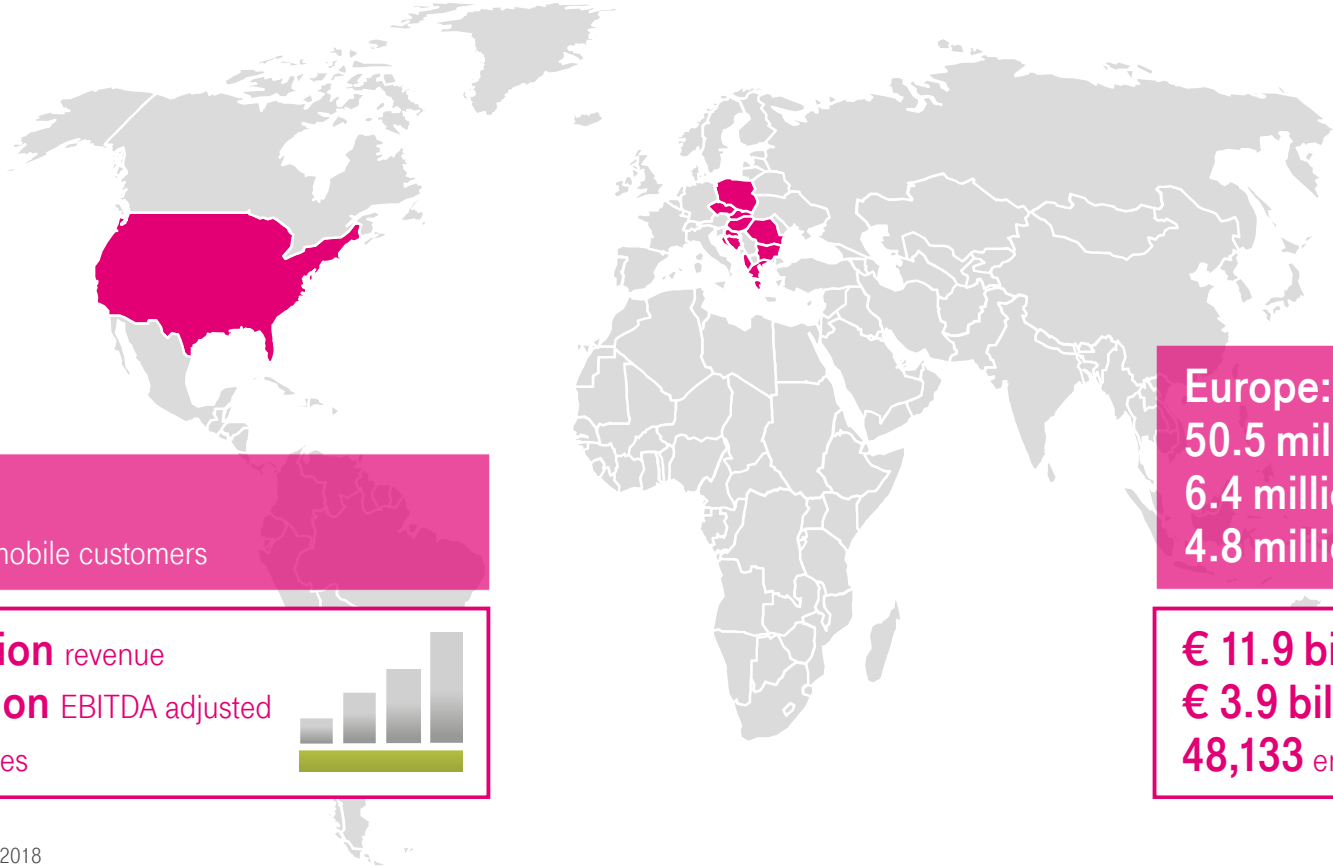
44.2 million mobile customers
13.6 million broadband lines
3.4 million TV customers (IPTV, SAT)

€ 21.7 billion revenue
€ 8.6 billion EBITDA adjusted
62,621 employees
98,092 employees in Germany overall



Financial figures taken from DT's 2018 annual report

EUROPE & UNITED STATES



T-Mobile US:
79.7 million mobile customers

USD 43.1 billion revenue
USD 11.9 billion EBITDA adjusted
46,871 employees



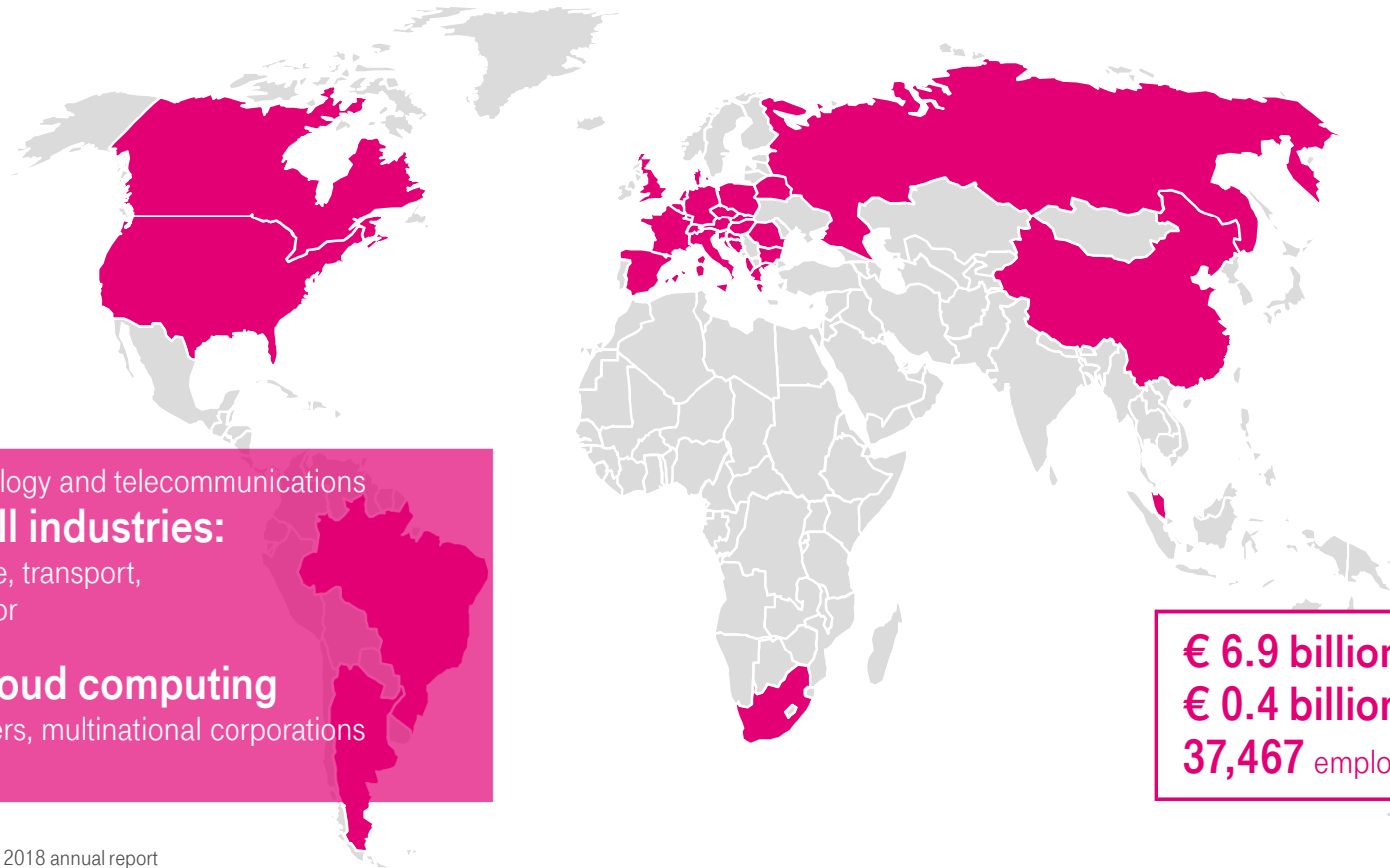
Europe:
50.5 million mobile customers
6.4 million broadband lines
4.8 million TV customers (IPTV,satellite,cable)

€ 11.9 billion revenue
€ 3.9 billion EBITDA adjusted
48,133 employees



Financial figures taken from DT's 2018

T-SYSTEMS



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

Pioneer in cloud computing
Corporate customers, multinational corporations
& public sector

€ 6.9 billion revenue
€ 0.4 billion EBITDA adjusted
37,467 employees



Financial figures taken from DT's 2018 annual report

HOW WE SEE OURSELVES

WHAT CONNECTS US.

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 efficiency, we are entering a world of infinite possibilities.

This connects us.

WE TAKE RESPONSIBILITY

Data privacy



Leading role in data privacy & data security

- Data Privacy Report & Security on the Internet report
- Honeypots as early warning system against cyber attacks



Diversity



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, e.g., E-mail Policy
- Winner of the Max Spohr prize for exemplary promotion of diversity

Sponsorship



Commitment to culture & sport

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

WE TAKE RESPONSIBILITY

CORPORATE RESPONSIBILITY

Sustainability & social engagement



Environmental and climate protection

E.g., CO2 reduction, efficient use of resources, sustainable mobility



Social engagement & stakeholder mgmt.

E.g., promote employees' social commitments, support education and competence in media



Sustainable products and innovations

E.g., environmentally friendly and accessible products, efficient data centers, ehealth



Sustainable supply chain

E.g., binding requirements for the supply chain, inspections and audits

Overarching



Integrated financial and CR reporting

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



Groundbreaking projects

- **Group climate protection target:**
100% energy from renewable resources until 2021, emission reduction by 90% until 2030
- **Media, but in secure mode**
offerings for competent media usage for target groups age 9-99
- **“Blue Angel”**
all wireless phones tagged with environment label “Stop wasting – start caring!”, systematic reduction of paper, plastic and electronic waste
- **Supplier selection and development:**
sustainability as a key criterion
- **Success in renowned Ratings & Rankings:**
RobecoSAM, oekom, CDP and Sustainalytics etc.

OUR GUIDING PRINCIPLES



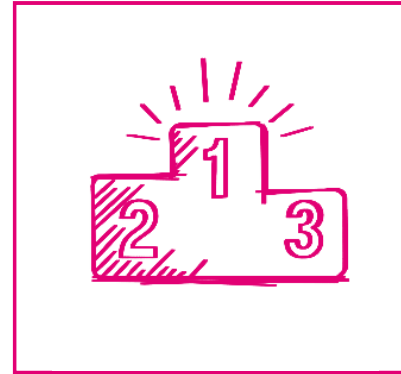
Customer delight and simplicity drive our action



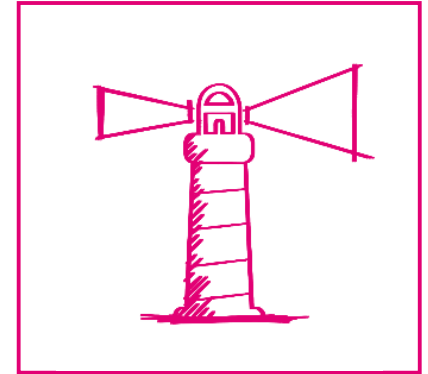
Respect and integrity guide our behaviour



Team together – Team apart



Best place to perform and grow



I am T – count on me

DEUTSCHE TELEKOM COMPANY PRESENTATION

OVERVIEW

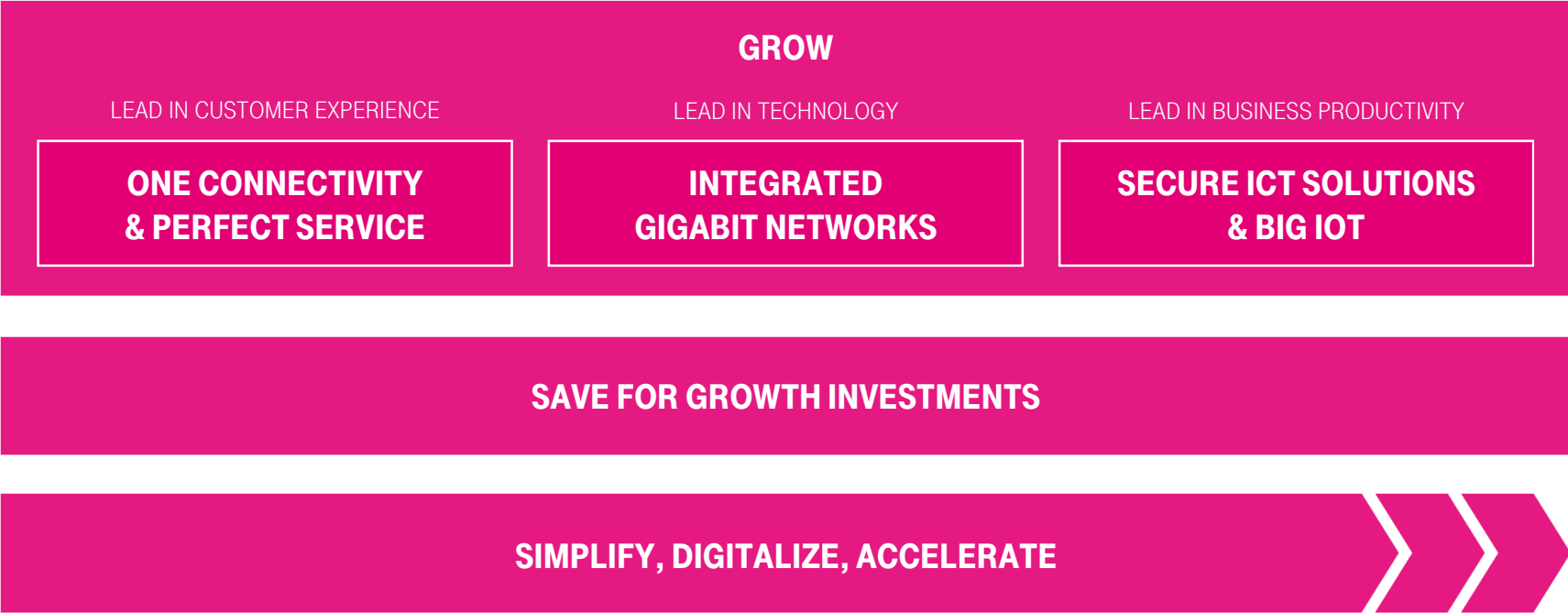
01 Deutsche Telekom

02 Strategy & Transformation

03 Network, Products & Innovation

04 Service & Brand

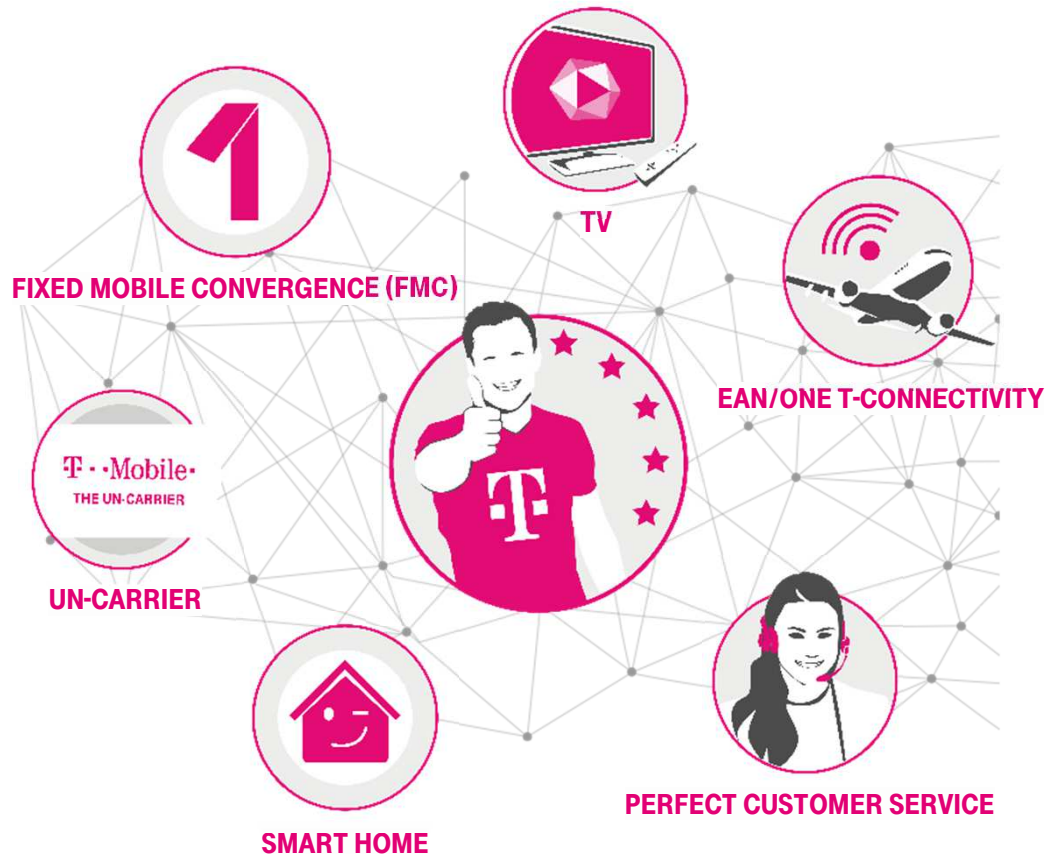
OUR AMBITION: LEADING EUROPEAN TELCO



FUTURE GROWTH IS FUELED BY THREE MAIN PILLARS



WE LEAD IN CUSTOMER EXPERIENCE AND IMPROVE CONTINUOUSLY

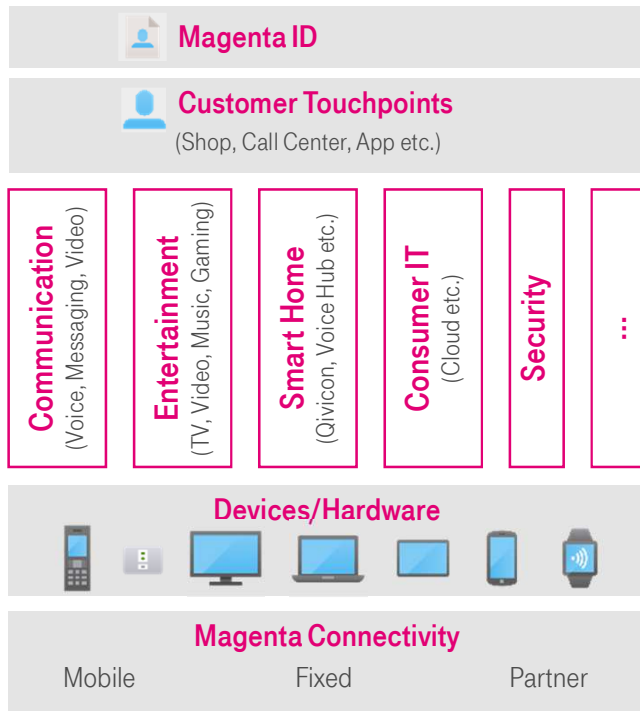


Our proof points

- ✓ We provide **one seamless T-connectivity**:
Connect App, European Aviation Network
- ✓ We offer the leading **FMC** proposition:
+1.5 mn FMC customers in our integrated footprint (FY 2017)
- ✓ We are **“The Un-Carrier”** in the US:
+11% post-paid customers in 2017
- ✓ We have made it to the living rooms with simple, modular products:
TV, Smart Home, Smart Speaker
- ✓ Our **customer service** is continuously improving:
Decreased no-shows in Germany by 33% (FY 2017)

MAGENTA 1: OUR UNIQUE CONVERGENCE OFFER

More than a tariff...



Seamless customer experience

- Magenta ID as single identifier
- Omni-channel customer journey

Seamless products & services

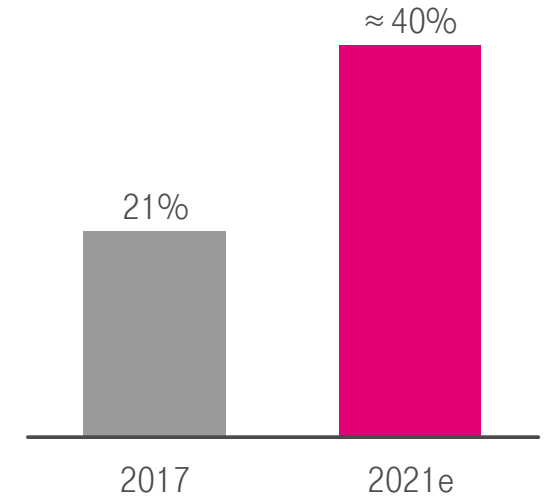
- Comprehensive portfolio positioned in the living room
- Integration across devices

Seamless connectivity

- Access agnostic
- Make, buy and partner

...and resonating with customers

FMC HH penetration in Germany and Europe (blended)
(FMC HHs/fixed broadband base)



WE STRIVE FOR PERFECT CUSTOMER SERVICE

We treat service as a key differentiator...



DER SERVICE

- ✓ Dedicated organization with > 30,000 employees for E2E responsibility of customer service
- ✓ One touch self service ability and personalized customer care with “Mein Magenta App”¹
- ✓ Predictive maintenance to fix problems before they arise



TEAM OF EXPERTS (TEX)

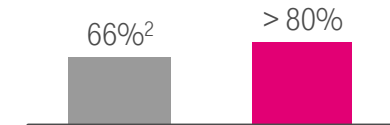
- ✓ Own P&L responsibility for dedicated teams
- ✓ Very high “Care NPS” (+9 pts. yoy 2017) at very low costs per account (-13% yoy 2017)
- ✓ Focus for 2018: global care to ensure 24/7 best customer experience

¹ Formerly MagentaSERVICE App ² Q1 2018

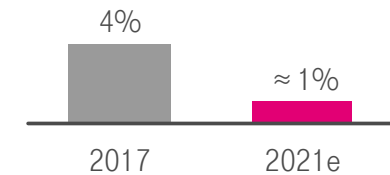
...reflected in our high ambitions



Contact resolution within 24h



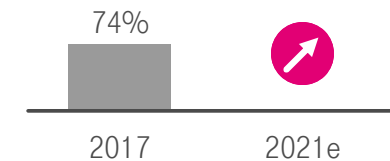
Rate of complaints



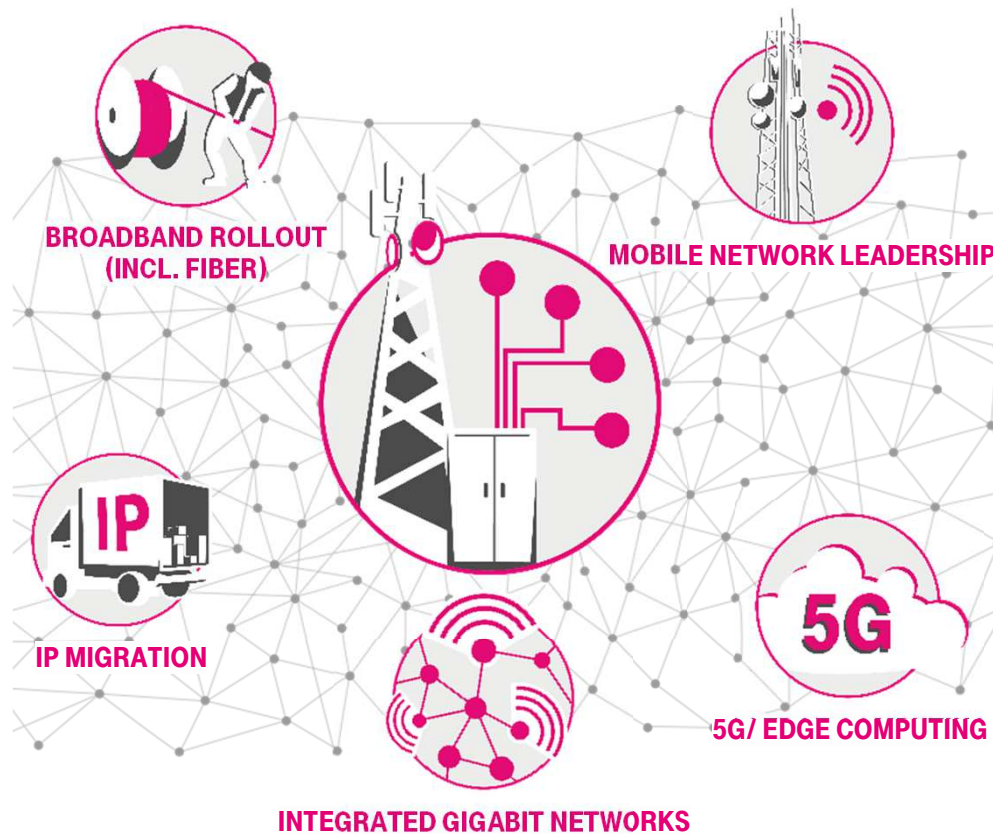
Net promoter score



Customer service satisfaction



WE ARE “DEDICATED NETWORK INVESTORS”



¹ Bandwidth ≥ 50 Mbps, delayed due to regulatory decisions

Our proof points

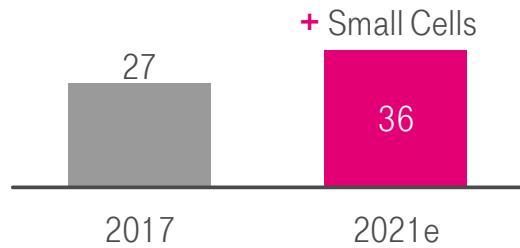
- ✓ **We own extended fiber backbone in our european footprint:** Key asset for **integrated Gigabit networks**
- ✓ **We roll out broadband for the masses:** ≈ 80% HH coverage with vectoring in 2019 (≈ 62% in 2018)¹
- ✓ **We push the fiber rollout:** Already more than 455,000 km fiber deployed in Germany, 240,000 km in our EU footprint
- ✓ **We enable real-time networks: IP migration** completed in 5 EU NatCos, 75 k BNG access nodes migrated in Germany in 2017
- ✓ **We provide leading mobile network quality:** Winner of all relevant network tests (e.g. Connect, P3, Opensignal)
- ✓ **We drive network innovation with 5G and Edge Computing:** 600 MHz rollout started in US, MobileEdgeX launched

MOBILE NETWORK LEADERSHIP EVERYWHERE

Germany



Macro cell sites,
k



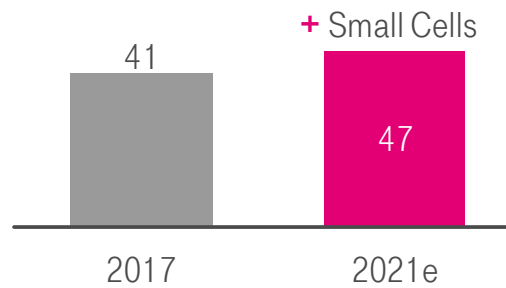
Strengthen leadership position (incl. 5G) & enable new use cases (e.g. IoT, FWA)



Europe



Macro cell sites,
k



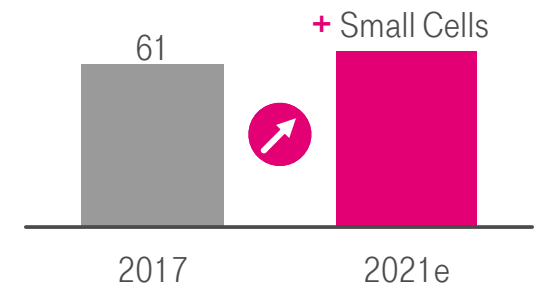
Build on strong fiber footprint to lead in 5G & maintain growth momentum



TMUS



Macro cell sites,
k

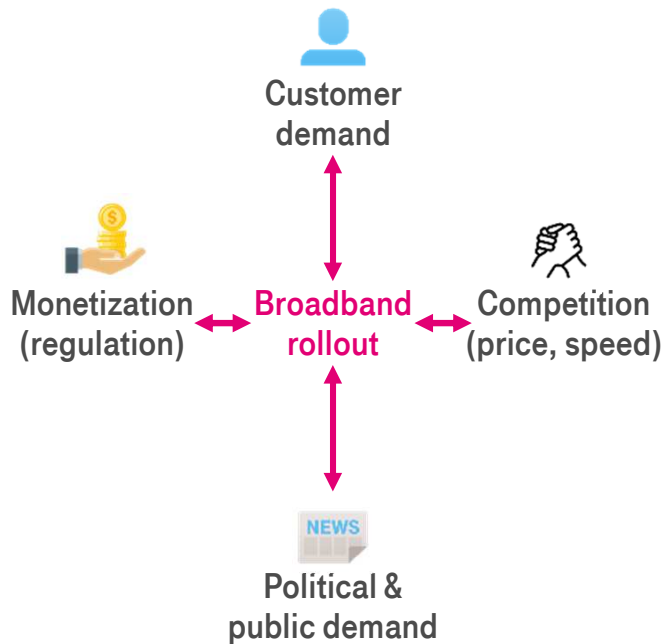


Extend network capacity & density to pave way for 5G



PUSHING FIBER ROLLOUT IN GERMANY...

In a very complex environment...



...we developed a sustainable & economically viable fiber rollout plan

High-speed networks (50–250 Mbps)

- ✓ Finalize and monetize (Super) vectoring rollout for max. high-speed coverage until end 2019e
 - 80% DT infrastructure
 - 95% incl. wholebuy

Start FTTH rollout from 2018

- New residential areas
- Business parks
- Telekom@School

Ramp up to 2 mn HH p.a. by 2021e

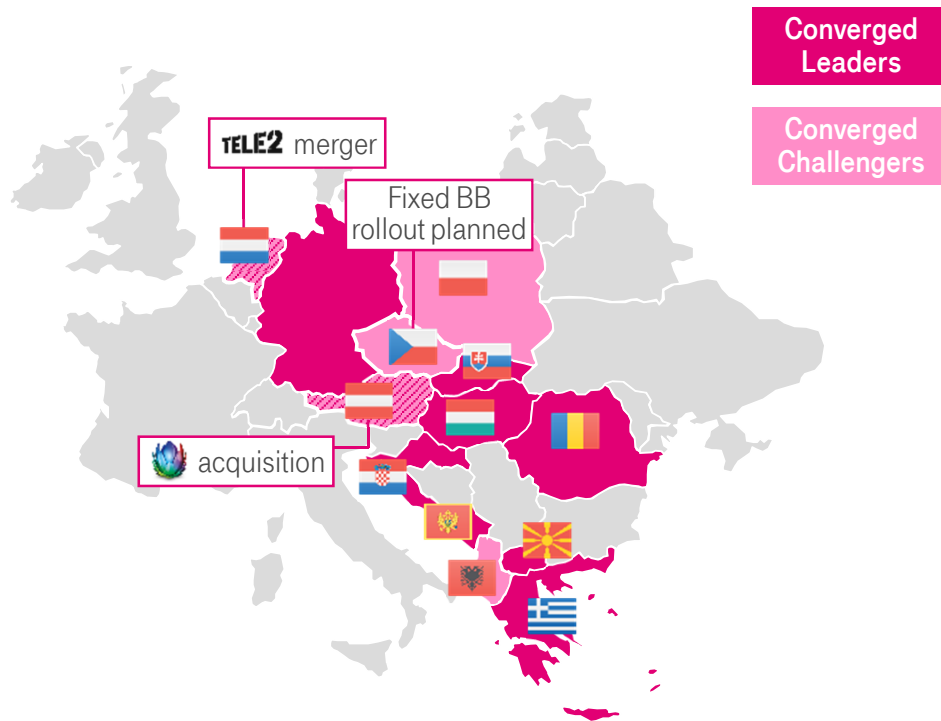
- White spots (subsidized)
- B2C winback areas
- ... complemented by cooperation & co-invest models and supported by a sensible wholesale access model

Benefits for DT:

- ✓ Defend/grow market share
- ✓ Maintain high & stable investment budget
- ✓ Adhere to strict FTTH/B return criteria: 7.5% IRR
- ✓ Enable the Gigabit society

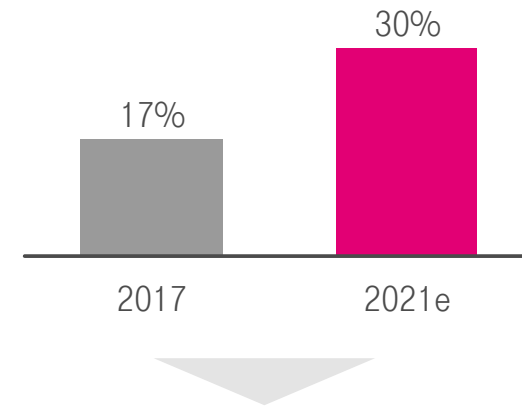
...AND INTEGRATING GIGABIT NETWORKS IN EUROPE

Uniquely positioned to drive FMC...



...and further drive broadband rollout

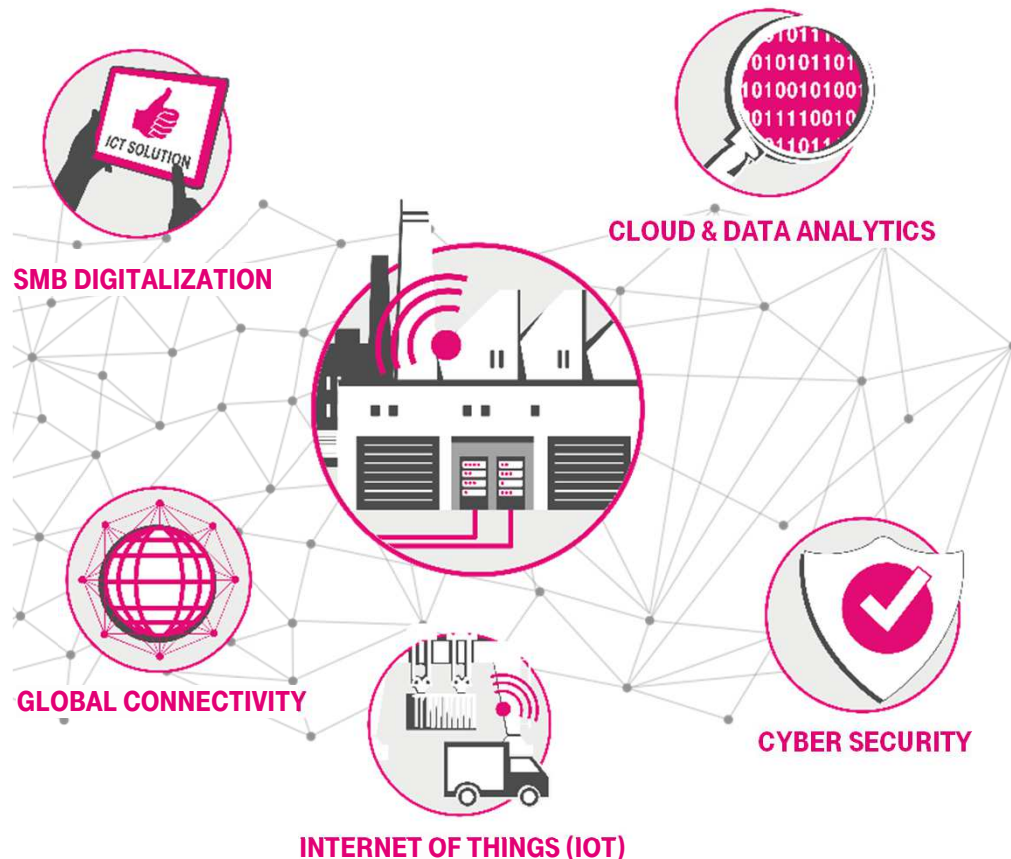
FTTH/B household coverage¹,
% of HH in GR, HU, SK, HR



- **Triple organic FTTH/B investment** (run-rate p.a.) within stable total capex envelope in EU NatCos until 2021e¹
- **FMC proposition** to drive **penetration** & **mitigate back book risks** (front book ≈ back book)

¹ FTTH/B and Cable ED3.1, excluding Romania

WE INCREASE BUSINESS PRODUCTIVITY...



Our proof points


- ✓ We build horizontal platforms & vertical solutions for the **Internet of Things**: NB-IoT network in 8 EU markets & US, IoT unit established
- ✓ We enable **E2E SMB digitalization** with **secure & reliable ICT solutions**: Existing trusted customer relationships, 20% IT/Cloud revenue growth in SMB in 2017 in Germany
- ✓ We provide leading **cyber security solutions**: German market leader with > 1,400 experts
- ✓ We enhance our **global connectivity proposition**: Germany-outbound focus, smart SD-WAN powered by ngena
- ✓ We provide platforms for **secure data exchange and analytics**: Telekom Data Intelligence Hub (DTH) launched

...WITH SECURE ICT SOLUTIONS FOR SMB DIGITALIZATION

We leverage our strengths...

 Trusted partner with strong B2B brand & customer base

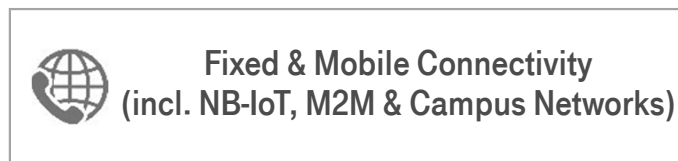
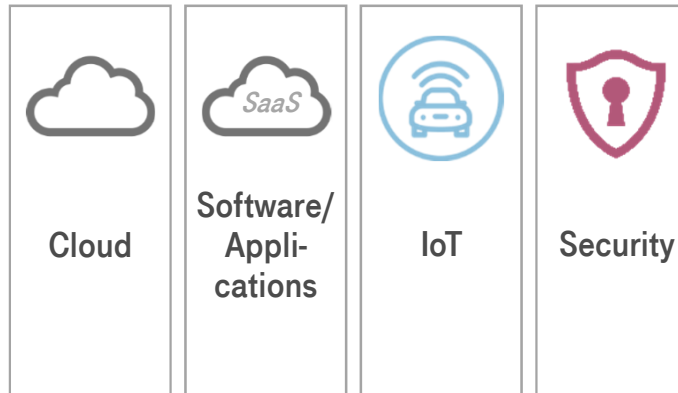
 Large & efficient sales force

 Reputation as ICT provider (8x isg/Experton leader)

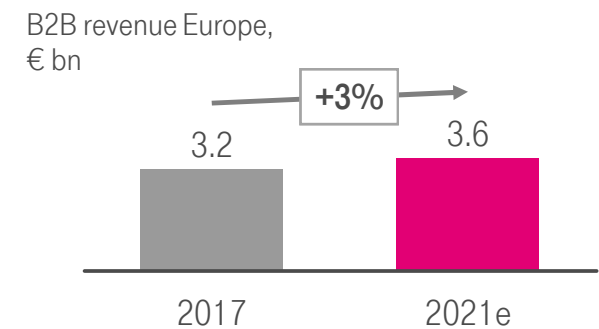
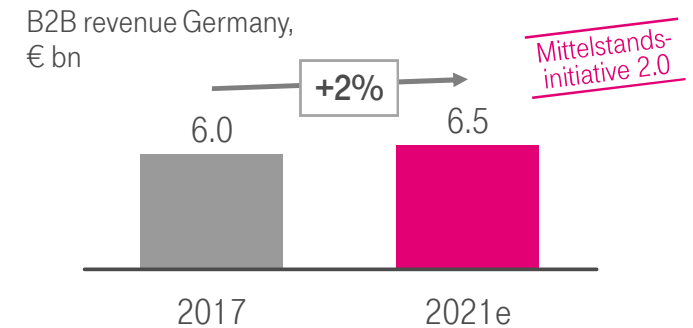
 Local partner network

...with a strong portfolio...

Connectivity-Based Converged ICT Portfolio



...to grow in SMB digitalization

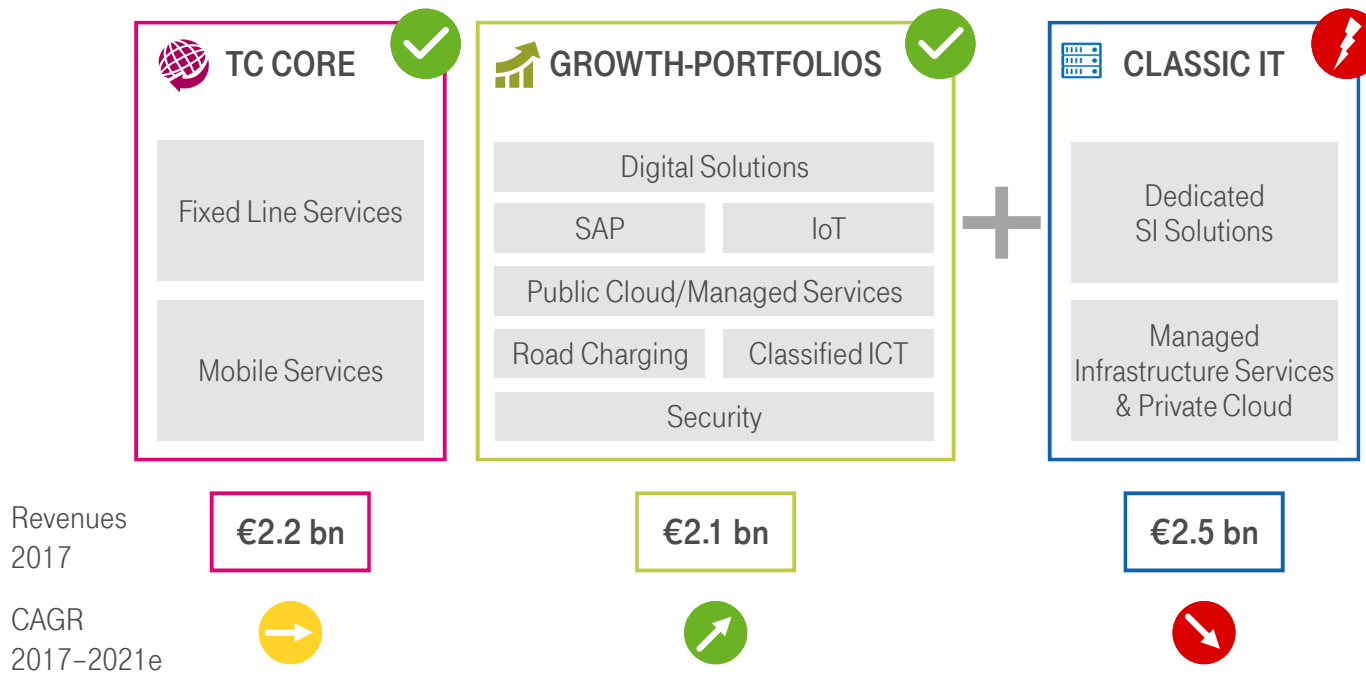


CAGR

CLEAR TURNAROUND PLAN FOR T-SYSTEMS

Preserving optionality with portfolio-based steering...

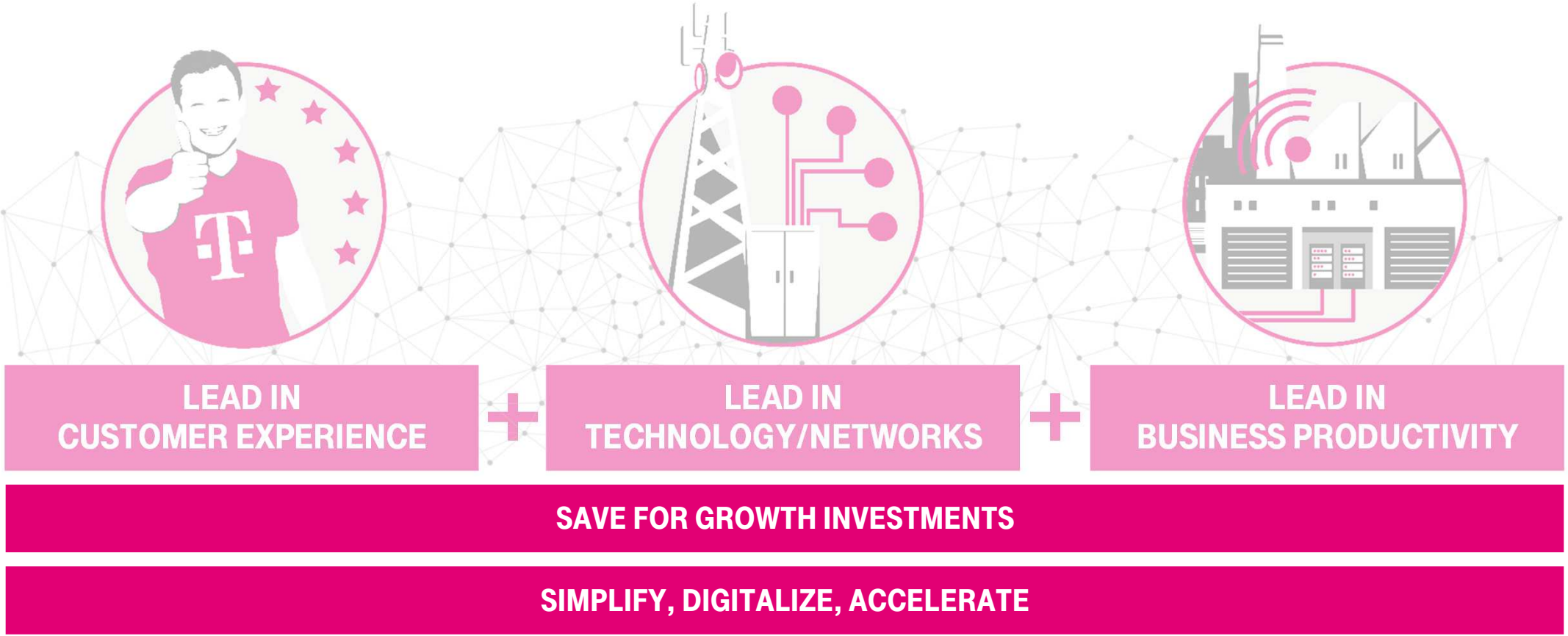
...and turnaround initiatives



- Sales revitalization
- Portfolio focus
- Delivery integration
- Overhead reduction

- ✓ Transform revenue mix towards growth portfolio
- ✓ Increase profitability (Cash contribution breaking even in 2020e)
- ✓ Maintain strategic optionality

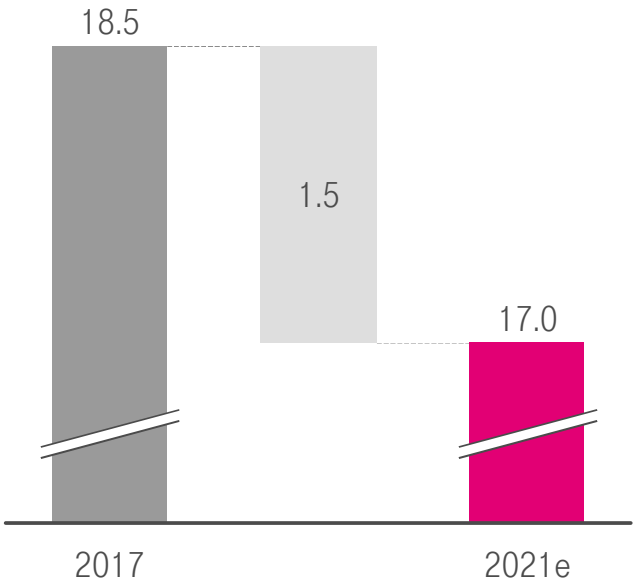
GROWTH UNDERPINNED BY VALUE TRANSFORMATION



EFFICIENCY TO FUND INVESTMENTS INTO GROWTH

Accelerated cost reduction...

Indirect Costs DT Group ex US, €bn



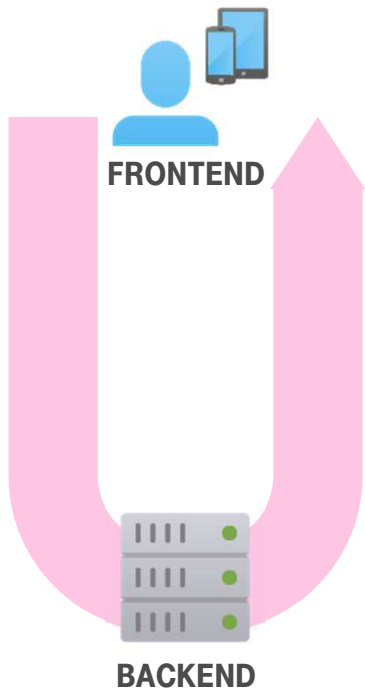
- Address cost savings potential **more effectively** than in the past
- Focus on **operational excellence** and **lean organizational structure** (e.g. enabled by digitalization)

...across all segments

	-€0.8 bn
	-€0.4 bn
	-€0.1 bn
	-€0.2 bn

DIGITAL TRANSFORMATION TO ADDRESS UNTAPPED POTENTIAL

We have started our E2E digitalization...



We digitalize our touchpoints:

“Mein Magenta App” in Germany¹, One App for EU

We simplify our products and services:

e.g. EU tariff reduction

We automate our core business processes:

1,500 bots handling 20 mn transactions in Germany

We exploit our data:

> 300 analytics use cases, > 50 ongoing AI projects,
> 100 experts working on AI

We transform our IT systems:

Portfolio approach in Germany, harmonized API Layer in EU

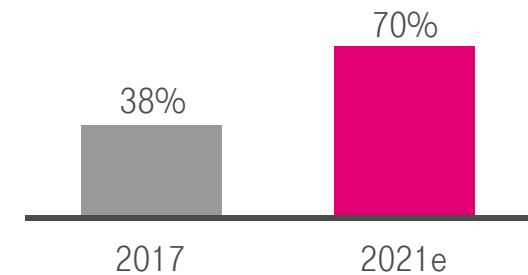
We digitalize our network for real-time operations:

IP/BNG migration, Access 4.0

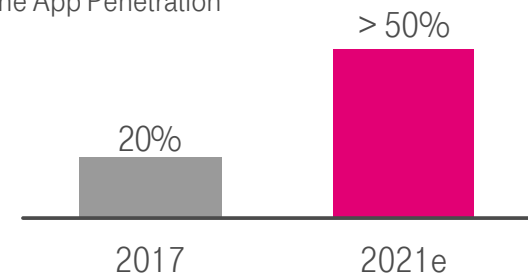
...and aim for more



Share of resolved requests in digital channels²

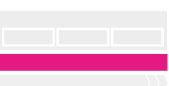


One App Penetration



¹ Formerly MagentaSERVICE App ² E-Service Share Interaction, year end 2017

OUR STRATEGIC CORE BELIEFS

	<p>We relentlessly strive for leadership in customer experience</p> <ul style="list-style-type: none">▪ We provide one seamless global T-connectivity▪ We offer the leading FMC proposition based on simple & modular products▪ Our sales experience is truly omnichannel, and our service is digital, proactive, and 'perfect'
	<p>We lead in technology with future-proof & integrated Gigabit networks</p> <ul style="list-style-type: none">▪ We maximize Gigabit coverage with future-proof fiber networks and alternative technologies such as FWA/5G▪ Software-defined networks enable real-time operations▪ We operate one central & virtualized production model to realize group-wide synergies
	<p>We are the leading partner for business productivity</p> <ul style="list-style-type: none">▪ Secure and reliable ICT solutions drive end-to-end digitalization of our business customers▪ Our horizontal platforms and vertical solutions enable the Internet of Things▪ Partner products and services enhance our core proposition
	<p>We strive for a benchmark cost structure and re-invest into growth</p> <ul style="list-style-type: none">▪ Benchmark efficiency is necessary to preserve our competitiveness & maintain high investment volumes▪ Organic and inorganic investments spur growth in our core business and selected adjacencies
	<p>We constantly digitalize, simplify and accelerate our operations</p> <ul style="list-style-type: none">▪ Digitalization increases our efficiency and improves customer experience▪ We build a radically simplified and agile IT architecture▪ Our people are empowered to take ownership, collaborate across silos, and work in a truly agile way▪ We take a flexible & step-wise approach to effectively implement our strategy

We are THE trusted partner for our customers' digital needs

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OUR BEST NETWORK AT A GLANCE

NUMBERS, DATA, FACTS

13 MILLION BROADBAND LINES

LARGEST NUMBER OF OPTICAL FIBER CUSTOMERS OF ALL EUROPEAN NETWORK OPERATORS¹

25,000 NEW „GRAY BOXES“

MULTI-FUNCTION CASING FOR FAST INTERNET²

4 BILLION EURO

ANNUAL INVESTMENT IN GERMANY

UP TO 500 MBIT/S

MOBILE SURFING WITH LTE

FIRST HYBRID ROUTER

FOR MORE BANDWIDTH IN THE MASS MARKET

MORE THAN 7,500 COOPERATION PROJECTS

WITH CITIES AND MUNICIPALITIES FOR BROADBAND EXPANSION¹

70,000 MIGRATIONS

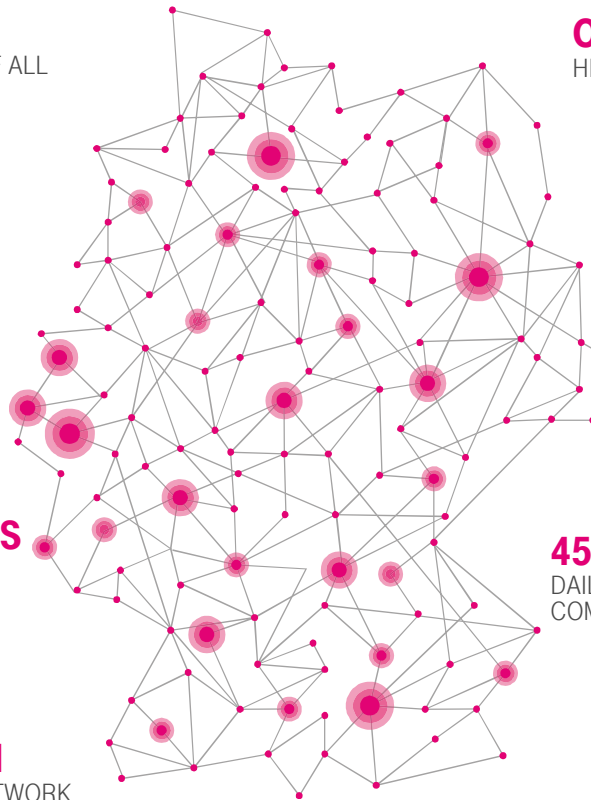
TO IP-BASED TELEPHONY PER WEEK

15 MILLION LINES

ON MODERN IP-BASIS¹

455,500 KM

FIBER OPTICS NETWORK



OVER 93% LTE NETWORK COVERAGE

HIGH AVAILABILITY OF FAST MOBILE INTERNET¹

MORE THAN 42 MILLION CUSTOMER

TELEPHONE AND SURF IN THE MOBILE COMMUNICATIONS NETWORK¹

GIGA-SPEED

FTTH: 1 GBIT/S DOWNLOAD AND 500 MBIT/S UPLOAD

MORE THAN 20 MILLION LINES

CONNECT OUR FIXED NETWORK IN GERMANY¹

500,000 „GRAY BOXES“

E.G. CABLE SPLITTERS AND MULTI-FUNCTION CASINGS¹

45 MILLION PHONE CALLS

DAILY VIA IP PLATFORM IN FIXED NETWORK AND MOBILE COMMUNICATIONS

ABOUT 30,000 KM ANNUALLY

GROWS OUR FIBER OPTIC NETWORK

200,000 CONSTRUCTION PITS

DUG IN 2016

¹ as of Q2/2017 ² in 2016

OUR BEST NETWORK AT A GLANCE

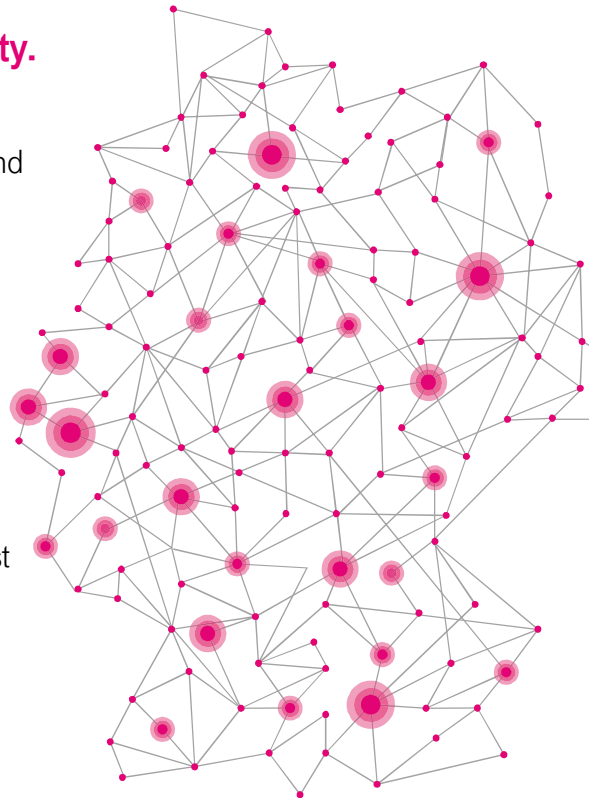
AWARDS

**Best network coverage, bandwidth and stability.
In mobile and fixed networks.**

- Leader in broadband quality for mobile communications and fixed network
- Innovative products
- Biggest bandwidths
- Best network coverage

Awarded repeatedly.

- For the sixth consecutive time: Telekom wins the large-scale Connect and CHIP mobile network tests
- Car Connectivity Award: 7 out of 10 readers vote as the best automobile network
- TÜV certified: Telekom Deutschland offers the best mobile network quality in LTE, according to QcC standard.*



* QcC: Quality comparison from the customer's point of view with the criteria "Success rate in setting up a call", "call stability" and "voice quality" as well as "Success rate in data transmission" and "Service quality based on average data throughput".

PRODUCTS & SERVICES

Consumers



- Cutting-edge mobile communications and broadband experience
- TV
- Smart Home

Business customers



- Information & communication technology (ICT) solutions
- Outsourcing & cloud services
- Intelligent network solutions for the health care, automotive and energy industries

Innovation & Partner Services



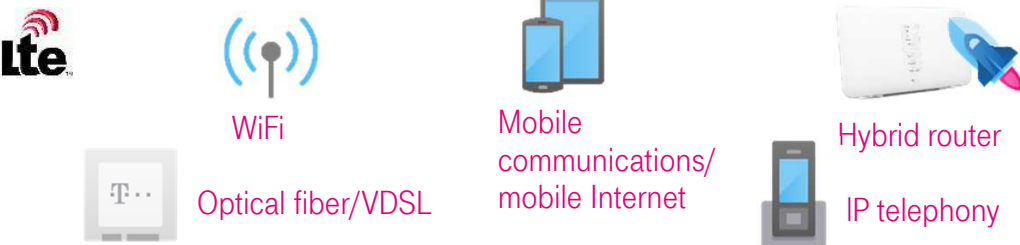
- Partner for infrastructure access and network services
- Platforms & partnerships for innovative services

PRODUCTS & SERVICES CONSUMERS

Cutting-edge broadband and mobile communications experience

Lte **WiFi** **Mobile communications/ mobile Internet** **Hybrid router**

Optical fiber/VDSL **IP telephony**



Entertainment



Innovative services



Smart Home



PRODUCTS & SERVICES CONSUMERS

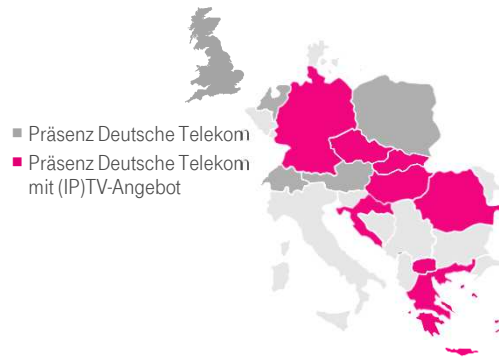
EXAMPLE: GERMANY



ENTERTAINMENT

TV AND ENTERTAINMENT-SERVICES

TV



- TV in D/Europa, 9 countries in total
- >7 million TV customers

EntertainTV in Germany:

- TV with around 300 channels (>100 HD channels)
- Access to over 100,000 on-demand content from multiple partnerships
- Exclusive content for EntertainTV series and Telekom Sport
- Attractive UHD content for an even more brilliant image
- Entertain TV mobile: TV on tablet, PC and smartphone

Entertainment

Music Streaming StreamOn :

- Music and video streaming without burdening your own data volume
- 125 partner services for music streaming, 60 partner services for video streaming

STREAMON

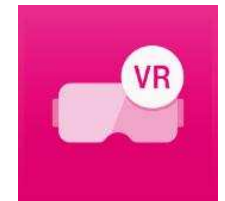
MagentaMusik 360:

- Concerts in live stream online, via App and on EntertainTV
- Numerous perspectives for a 360-degree experience in high definition



Virtual Reality:

- Contents from entertainment, music and sport with Magenta VR-App
- Partner offers from Red Bull, National Geographic and Twentieth Century Fox

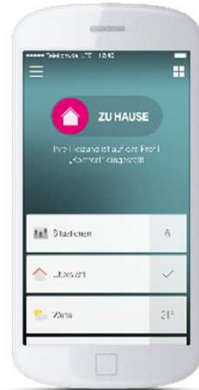


SMART HOME

Smart Home – Home control on the move

With Magenta SmartHome from Telekom, you can enjoy the feeling of always having everything under control at home: control your lights, heating, and many other electrical devices conveniently with your smartphone/tablet – from anywhere, at any time.

- Makes your home more convenient, more secure, and more energy efficient
- Simple to install and intuitive to operate
- Smart Home app as a mobile control center
- Portfolio expanding continually
- Intelligent networking of the various components
- Individual, flexible expansion with the modular portfolio
- Meets highest data privacy and data security criteria
- Wide range of compatible components from different manufacturers
- Based on QIVICON, the multi-brand platform for home control systems



PRODUCTS & SERVICES FOR BUSINESS CUSTOMERS

Information & communication technology solutions (ICT)



ICT expertise & cloud portfolio



Dynamic IT access (cloud computing)

Intelligent network solutions



Automobile



Collaboration



Mobile company (cloud services)



Energy



Health

SERVICES FOR B2B

WHY T-SYSTEMS?



FOCUS ON SECURITY

- Zero-Outage-Culture
- German data privacy
- Protected IT infrastructures and secure networks



IT AND CONNECTIVITY

- Broad portfolio
- Reliability (24/7 availability)
- Access from any location must be ensured end-to-end at all times
- Optimization of network, servers and applications



TECHNOLOGY COMPETENCE

- Extensive partner ecosystem
- Hybrid/multi-cloud competence
- integration expertise

UNIQUE CHARACTERISTICS T-SYSTEMS

TOP CUSTOMERS

All DAX 30 companies
19 of the Fortune 100



BROAD PORTFOLIO

Covers IT and
telecommunications



INVESTMENTS IN GROWTH THEMES

>500 million per year



EXPERTS

Solutions for highly complex
challenges through
"German engineering"



COMMITTED EMPLOYEES

Technology is nothing without
the right people



THE BRAND MAGENTA

Deutsche Telekom is the No. 1
telco carrier in Europe
(by revenue and market capitalization)



INNOVATION AT DEUTSCHE TELEKOM

WE FOLLOW 3 BASIC PRINCIPLES

Portfolio & Innovation Board



COLLABORATION

BUSINESS UNITS WORK TOGETHER
ACROSS DIVISIONS

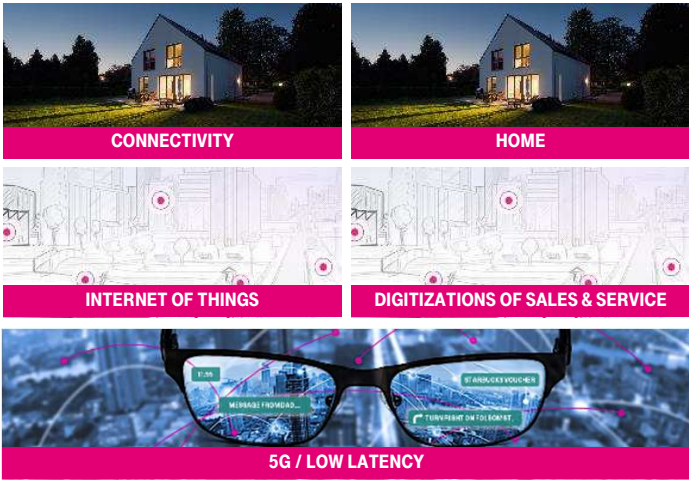
Corporate Innovation Fund



AGILITY

SPEED & FLEXIBILITY
THROUGH FINANCIAL STAKES

4+1 Priorities in Innovation



FOCUS

LONG-TERM STRATEGIC INITIATIVES

... IN COOPERATION WITH PARTNERS WORLDWIDE

Group Partnering



Promoting innovation worldwide

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

hub:raum



Innovation transfer from the world of start-ups

Early development of new business ideas. Continuous 'scouting', start-up programs, strategic investments

T-Labs



Research from the world's best universities

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



EXAMPLES

WE ADDRESS ALL DIMENSIONS OF INNOVATION

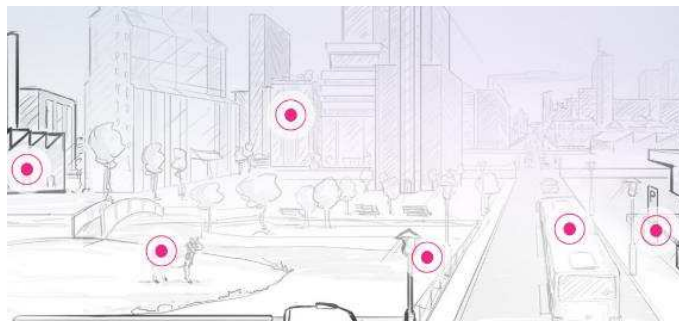
Smart Home



True integration at home

Realization of the vision of a seamlessly networked home

NB-IoT



Industry-level connectivity

Development and standardization of a wireless NB-IoT network for a variety of applications (e. g. containers, parking meters etc.)

5G / Low Latency



Infrastructures of the Future:

Tactile Internet & Edge Computing Ecosystem

Extremely short license times (e. g. availability, reliability) and examples of future real-time applications



short term

TIME TO MARKET



long term

DEUTSCHE TELEKOM

STRATEGY & TRANSFORMATION

NETWORK, PRODUCTS & INNOVATION

SERVICE & BRAND

Innovation

DEUTSCHE TELEKOM COMPANY PRESENTATION

OVERVIEW

-
- 01** Deutsche Telekom

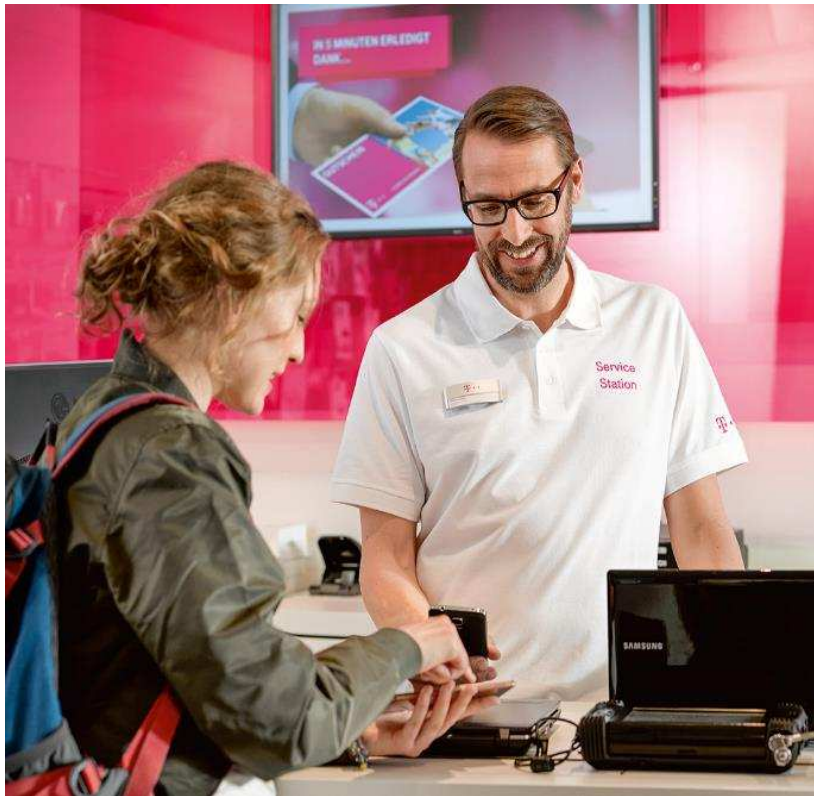
 - 02** Strategy & Transformation

 - 03** Network, Products & Innovation

 - 04** Service & Brand

BEST CUSTOMER SERVICE

EXAMPLE: GERMANY



Awards for customer service

- Awarded regularly: TÜV technical inspection service's "good" seal for customer service
- European Business Award: EU accolade awarded for excellence and an innovative and successful business model throughout Europe



Customer service

90 million customer contacts per year
68,4 million phone calls per year
20 million letters/faxes/e-mails per year

- Customer service in Web 2.0: "Telekom helps" on Facebook and Twitter feedback platform
- Customer service in App: MagentaService App and DSL Help App

Technical service

17,842 technical service employees

Daily workload (ø):

- **25,000** customer lines provisioned
- **18,000** customer contacts by phone
- **7,000** on-site installations
- **19,000** customer line faults cleared

OUR BRAND POSITIONING

LIFE IS FOR SHARING

EXPLICIT MESSAGES
What story do we tell?

- INNOVATION**
We strive for technology leadership by building an integrated network across Europe and offering seamless connectivity. Together with partners we provide a wide range of state-of-the-art products and services.
- COMPETENCE**
We create a unique customer experience across all touchpoints. Be it sales, product usage or customer care; We focus on the individual and the security of data.
- SIMPLICITY**
We make complex things simple so our customers can concentrate on what really matters to them.



IMPLICIT ASSOCIATIONS
How do we want to be perceived?

- TRUSTED**
We are reliable partners for our customers. We cultivate strong relationships with them. Our products enable our customers to be part of a group – a group they can rely on.
- APPROACHABLE**
Our brand is friendly and accessible. We are open to new things and open to the people around us. We express this in a warm, personable manner. We engage our customers at eye level. We are not commanding, condescending, arrogant or authoritarian.
- INSPIRING**
We enrich people's lives. Using and sharing our products and services within a group benefits all of the group's members. Shared experiences are twice as enjoyable. Our brand stands for a zest for inspiring experiences, a hunger to enjoy life to the fullest. This vivaciousness enables us, like our customers, to make the most of life and its multitude of possibilities, spontaneously and (pro)actively.
- AUTHENTIC**
Our tone of voice is authentic and straightforward. The moments we show are real, and can be big or small. The stories we tell are based on real life, situations that everyone can relate to, and that are familiar to us all.
- SOCIABLE**
Our brand is about "we" and "us", not "I" and "me". It focuses on enjoying life as part of a group.

OUR LIFESTYLE BRAND

LET'S FALL IN LOVE WITH MAGENTA

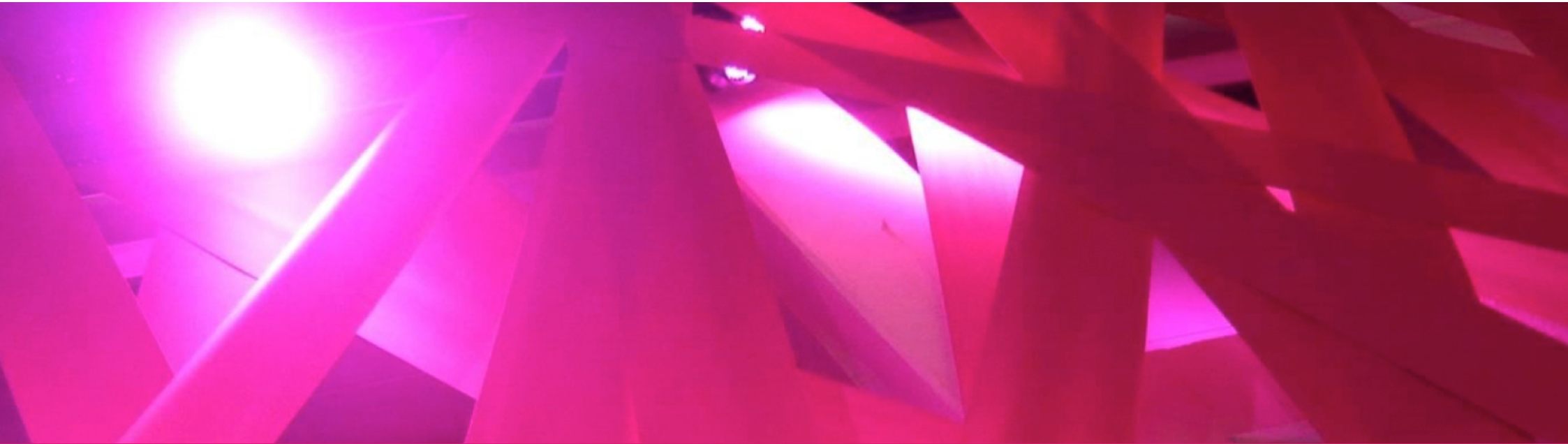
Magenta – so much more than just Deutsche Telekom's company colour – it's the most important element of our brand experience.

But we're taking it a step further because Magenta has become a real attitude and our way of living. With our lifestyle products our employees show their brand pride also beyond the company walls.

In our shop we display our favorite colour : sometimes bold, sometimes low-key - but always stylish and up to date.

lovemagenta.com





THANK YOU



LIFE IS FOR SHARING.