

Deutsche Telekom **Company presentation**

2026



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, service revenue EBITDA, EBITDA margin, adjusted EBITDA, adjusted EBITDA after leases, adjusted EBITDA margin, 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

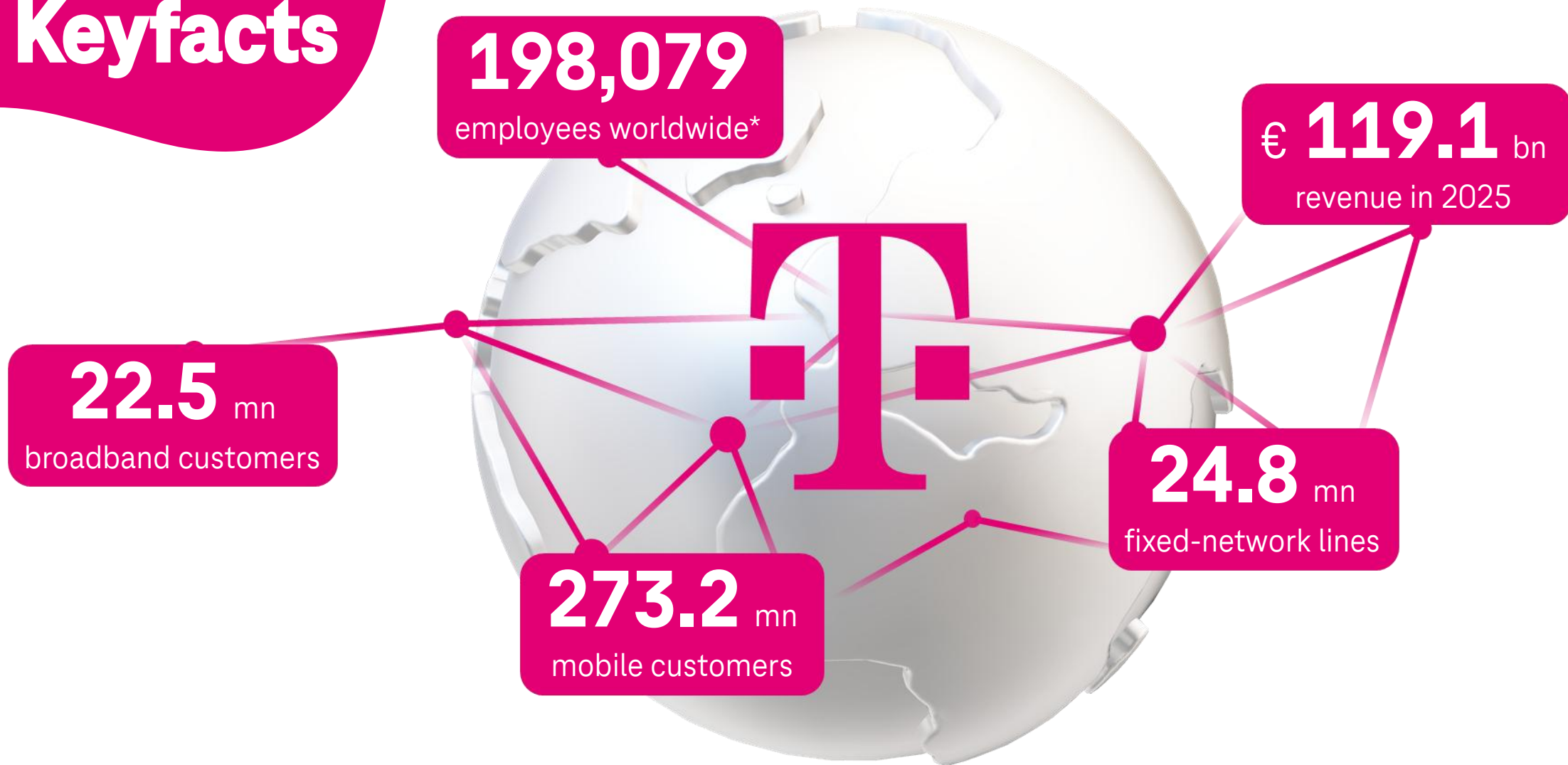
01 Profile

02 Strategy & Transformation

03 Network, Products & Innovation

04 Service & Brand

Our Keyfacts



Figures based on annual report 2025..
* Reporting date Dec. 31, 2025

Deutsche Telekom Profile



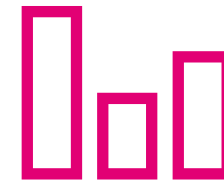
Customers

- **273.2 mn** mobile customers
- **24.8 mn** fixed-network lines
- **22.5 mn** broadband customers
- **9.2 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 **€ 119.1 bn**
- Adjusted EBITDA AL **€ 44.2 bn**
- Free Cashflow AL **€ 19.5 bn**



Employees & responsibility

- Employees worldwide: **198,079** (Reporting date Dec. 31, 2025)
- **4,683** trainees and cooperative degree students
- Pioneer of social issues (climate protection, data privacy, diversity, etc.)

Figures based on annual report 2025.

Germany

Facts & figures



74.5 mn mobile customers

15.1 mn broadband customers

4.7 mn IPTV customers incl. satellite



€ 25.6 bn revenue

€ 10.7 bn EBITDA AL adjusted

55,089 employees (Reporting date Dec. 31, 2025)

70,751 employees in Germany overall
(Reporting date Dec. 31, 2025)

Figures based on annual report 2025.

* Retail

United States & Europe

Facts & figures



Figures based on annual report 2025.

EUROPE



47.2 mn mobile customers
7.4 mn broadband customers
4.5 mn IPTV, satellite, cable customers



€ 12.7 bn revenue
€ 4.7 bn EBITDA AL adjusted
31,300 employees (Reporting date Dec. 31, 2025)

T-MOBILE US



142.4 mn branded customers
116.4 mn postpaid customers
25.9 mn prepaid customers



\$ 88.2 bn revenue
\$ 33.0 bn EBITDA AL adjusted
70,036 employees (Reporting date Dec. 31, 2025)

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



€ 4.1 bn revenue

€ 0.4 bn EBITDA AL adjusted

25,124 employees (Reporting date Dec. 31, 2025)

Figures based on annual report 2025.

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

\$ 96.2 Billion

Brand value more than **doubled** from 2020-2025

+114%

Source: Brand Finance Global 500 - 2025

We are AI optimists 1/2

For us, AI is not a topic of the future, but already part of our network infrastructure. We use artificial intelligence to plan networks faster, build them more efficiently and operate them more stably. The focus is shifting from reactive control to predictive, automated network management. We use AI safely and where it adds value.

The result: better quality, greater resilience and a noticeably improved customer experience.

AI in grid expansion

AI supports the planning and expansion of our fiber optic networks. It analyses geodata, demand and construction parameters in order to optimise expansion decisions. In this way, we accelerate the rollout and use resources in a more targeted manner.

[More information online](#)



AI agents for the mobile network

With AI agents, we are increasingly automating the operation of our mobile network.

The RAN Guardian detects malfunctions at an early stage and initiates optimizations independently. This increases grid stability and already significantly reduces manual intervention.

[More information online](#)



Profile

Strategy & Transformation

Agentic AI for the best experience

Together with Google Cloud, we are developing agent-based AI for network operations. "MINDR" analyzes complex grid situations in real time and can make autonomous decisions. In this way, we continuously improve the quality and performance of the network.

[More information online](#)



Network, Products & Innovation

Service & Brand

We are AI optimists 2/2

We are not only bringing AI to the web, but also directly to our customers. Our claim: to make AI simple, secure and usable for everyone. In doing so, we combine our own innovations with strong partners and scalable platforms. This results in concrete applications for everyday life, business and industry.

Magenta AI Assistant

The AI-based call assistant supports customers directly during the phone call. It provides real-time translation, contributes information on request and summarizes content. This makes communication easier, more efficient and more productive.

[More information online](#)



AI Phone brings „AI for everyone“

With the AI Phone, we integrate artificial intelligence directly into the end device. Users receive intuitive AI functions for communication, organization and everyday life. Our goal: powerful AI easily accessible to a broad target group.

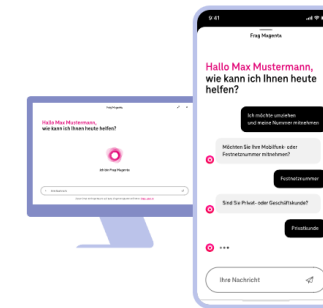
[More information online](#)



AI help in Service

Ask Magenta is Deutsche Telekom's digital assistant. Either as a chat or as a voice bot. Ask Magenta serves customers around the clock and without waiting time as a central gateway for service requests – from moving, new offers, questions about bills or devices, and also in the event of malfunctions.

[More information online](#)



We take responsibility 1/3

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 as pf 2025/entire value chain by 2040



Sustainable innovations and products

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



Impact Measurement:

systematic approach to measure social and ecological impact of products and projects (TÜV validated).

AI Phone with exceptional Eco Rating (90/100)



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:

CDP, oekom, MSCI and Sustainalytics, among others



We take responsibility 2/3

Corporate Responsibility

We shape the digital society



Connectivity & Resilience

Digital infrastructure as the foundation for social and economic stability.



Security & Trust

Data protection, security, and integrity as the basis for trust in the digital world.



Access & Inclusion

Accessible and affordable products and services for greater participation.



Knowledge & Enablement

Building skills for effective and healthy engagement in the digital world.



Strategic Philanthropy

Partnerships with foundations and NGOs as well as donations and corporate volunteering.

Groundbreaking projects



The Best Network

Our high-performance fixed and mobile networks reliably connect people, businesses, and institutions.



Cyber Security Services

Products and security solutions to protect sensitive data, systems, and digital processes.



Telekom AI Phone: AI for Everyone

T Phone 3 as an affordable AI companion for everyday life.



Teachtoday

Initiative to promote media literacy and safe internet use.



Telekom Stiftung

Educational foundation promoting STEM skills among children and young people.

Profile

Strategy & Transformation

Network, Products & Innovation

Service & Brand

#GOOD
MAGENTA



We take responsibility 3/3

Corporate Responsibility

Diversity, Equality and Inclusion



Leading role in societal and diversity-related issues

- Pioneer as first to introduce Group-wide women's quota
- Employee resource Groups (Diversity networks) covering all diversity dimensions to ensure the participation and visibility of all
- Modern working models to promote work-life-balance

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

Experience T - a workplace where you truly belong, where your perspectives inspire us and where trust gives you the confidence to make a positive impact.

With the strength of a global leader and the drive for innovation, we connect you with numerous pathways to continuously grow in new directions.

Together we shape a world of digital optimism and connect people - to each other and to the opportunities of a better tomorrow. Create connections that matter.

Facts & our employer positioning



70,740 Employees in Germany



4,683 Dual students/ trainees



28.7% women in top/middle management

Figures based on annual report 2025

Awards

(Selection)

**Leading Employer
2026 Global & Germany**



**Best employer for
apprenticeship & dual
study programs in
Germany 2025**



Profile



Strategy & Transformation



Network, Products & Innovation



Service & Brand



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.

The refreshed Guiding Principles codify our cultural evolution, defining the standards that bring T-Style to life.

						
FORMER	DELIGHT OUR CUSTOMERS We are the trusted companion and help our customers with achieving their goals - with simple, innovative and human-centered experiences.	GET THINGS DONE We are entrepreneurial and solution-oriented – this is how we stay ahead of our competition.	ACT WITH RESPECT & INTEGRITY We always do the right thing, every time and everywhere. What counts are our actions. We are actively committed to respectful interactions.	TEAM TOGETHER – TEAM APART We are one team. We challenge and empower one another.	I AM T – COUNT ON ME We are proud to be T. We act with passion, responsibility and commitment – trust means everything to us.	STAY CURIOUS & GROW We are curious and embrace continuous learning. This mindset lets us grow as an organization and as individuals.
						
	DELIGHT OUR CUSTOMERS Their needs and desires are our North Star. We win their hearts. Turning our customers into fans. With unmatched quality and experiences.	WE WON'T STOP We always give our very best. We relentlessly drive performance. Embracing technology. We remove bureaucracy that is holding us back. For us, good is not leading.	ACT WITH RESPECT & INTEGRITY We are a business with a purpose. We always do the right thing, in the right way. We act with empathy and respect. We value what each person brings.	ONE TEAM, TOGETHER We challenge and empower each other and win and lose together. We break silos. We openly discuss, decide and commit. Then we act - as one global team.	I AM T – COUNT ON ME We are proud to be T. We are there when it matters most. We act like owners – with passion and responsibility. Trust means everything to us.	STAY CURIOUS & GROW We aim high and keep evolving. We learn, unlearn, and relearn. We try, fail, and try better. That's how we grow as individuals and organization.

We are responsive



Timotheus Höttges

Chief Executive Officer (CEO)
Deutsche Telekom AG

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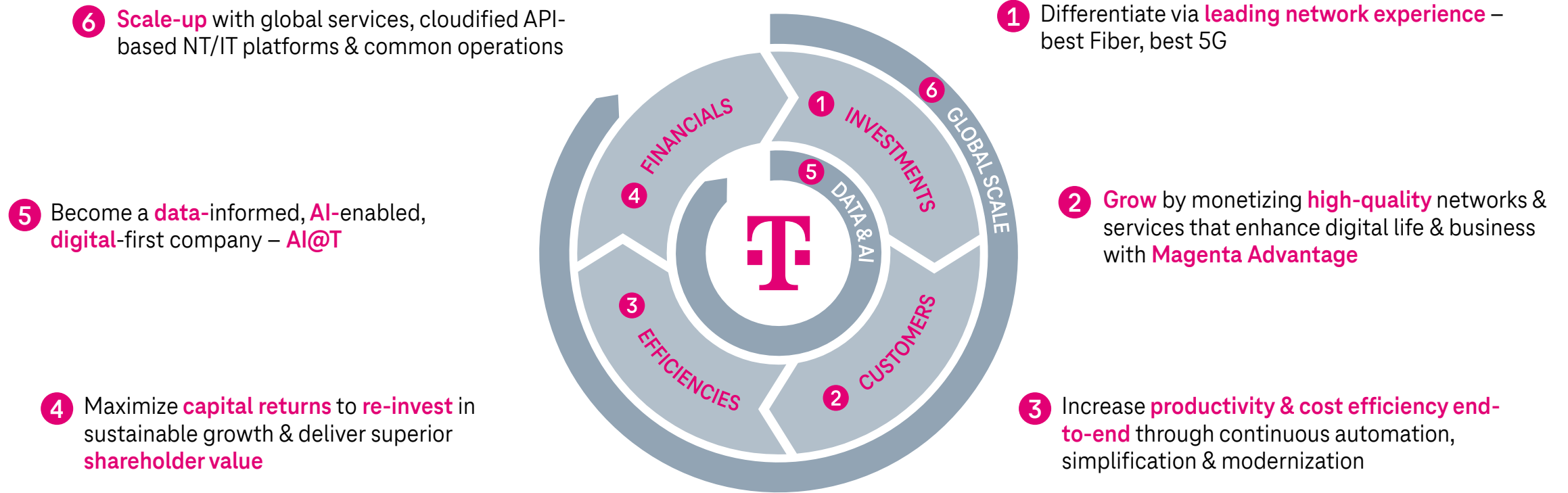
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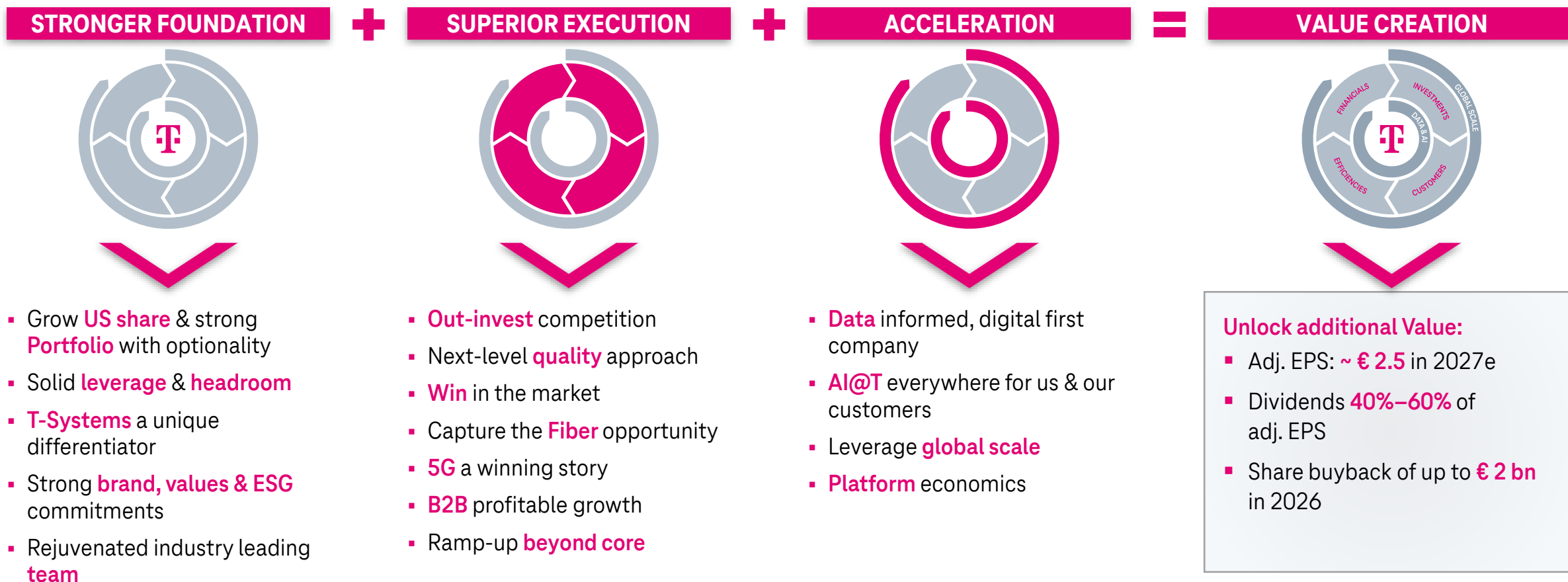
Our strategy: Leading Digital Telco



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

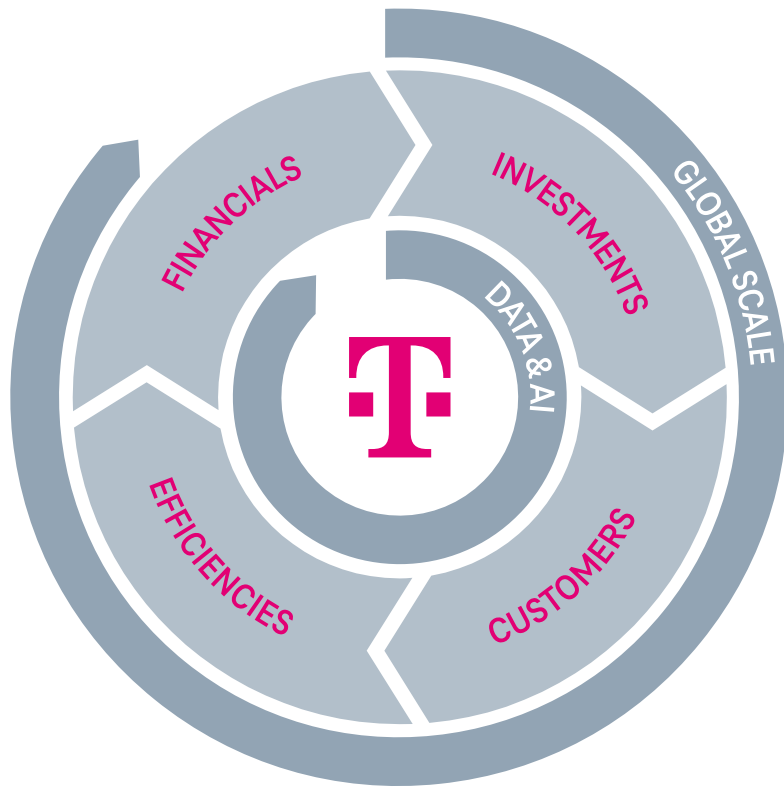
[Please click here for the all-in-one document of DT's Capital Markets Day in October 2024](#)

We are committed to lead and perform



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

2026 strategic priorities accelerating our flywheel



- 1 Double-down on **connectivity as our core differentiator** – while boldly exploring **new high-value biz opportunities**
- 2 **Strengthen our B2B momentum** through an integrated portfolio and **materializing (sovereign) AI and Cloud opportunities**
- 3 **AI will redefine everything** – and we consequently **invest throughout the whole organization** to lead the pack
- 4 Unlock the **full power of our transatlantic scale** and continue to **boost efficiency** at all levels
- 5 Maintain our **best-in-class capital allocation** to continue to drive **superior value** and **sustainable shareholder returns**
- 6 Empower the T: **invest in our brand – and the best team** with longterm **cultural transformation & rejuvenation**





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Multi award-winner:

Our best network (Germany)

5G

~100,100

5G antennas

FIBER

>860,000 km

fiber-optic cables

Our best network at a glance

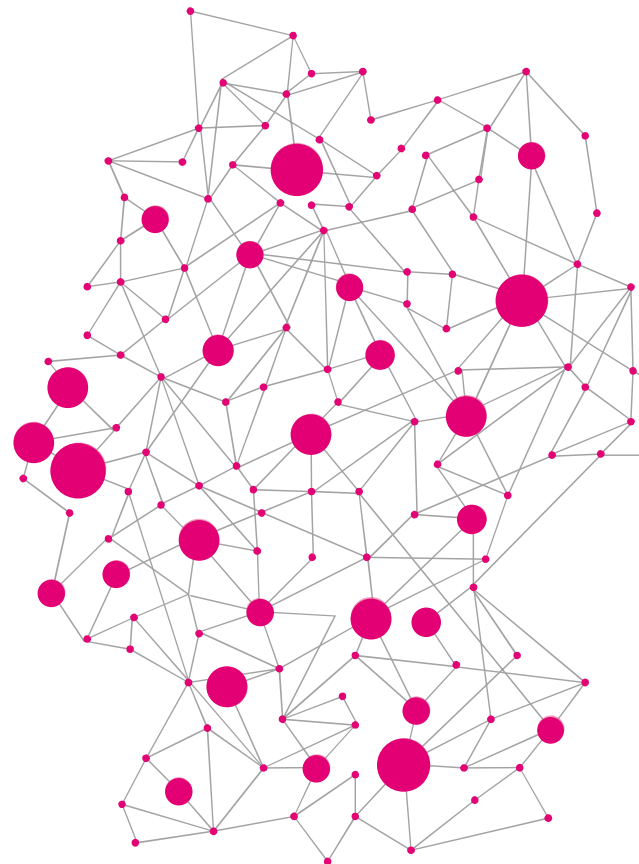
Germany

Fixed network

>860,000 km
fiber-optic cables (end of 2024)

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

> 37 million households
Tariff up to 100 Mbit or more (Q3/2024)



Mobile network

~100 100 5G antennas
(End of 2025)

99% 5G network coverage
(End of 2025)

99%
LTE coverage of population
(End of 2025)

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

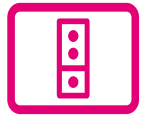


Repeatedly awarded



The network is at the core of our value creation

and decisive for Germany's digital future



Internet speed

Demand for **very high and equally fast upload and download speeds** continues to grow. **Fiber** provides the **long-term scalable infrastructure** for data-intensive applications across households, businesses and the public sector.



Network coverage

Demand for **very high and equally fast upload and download speeds** continues to grow. **Fiber** provides the **long-term scalable infrastructure** for data-intensive applications across households, businesses and the public sector.



Devices

The number of **connected devices** is growing exponentially — from smart homes and industrial facilities to connected vehicles. Persistent, reliable **connectivity** is becoming a fundamental requirement for **digital value creation**.



Latency

In addition to high bandwidth, **low latency** is becoming increasingly important — particularly for industrial applications, autonomous systems, telemedicine and real-time control. **5G SA and edge architectures** enable new business models through reliable **real-time communication**.



User Experience

New applications such as **AI-powered services**, cloud gaming, XR applications and connected production processes are significantly increasing requirements for **capacity, stability and real-time performance** of networks.

Products for our
Consumers



Unlimited

MagentaTV

Magenta Zuhause

Beyond Core

Strong products and services for retail customers

We offer products and services that are innovative, secure, and simple.



Truly unlimited

With the new MagentaMobile rates, your family can surf without limits – no data caps, no restrictions. Starting with the first Plus card, everyone gets unlimited data*. And the best part: the more people you have, the cheaper it gets.

* Applies to MagentaMobile M tariffs and for MagentaEINS customers with MagentaMobile S tariffs or higher.



MagentaZuhause

With our MagentaZuhause tariffs, you can surf the best network at home and stay connected to your loved ones – because we connect Germany: now and forever!



MagentaTV

More for everyone – entertainment for the whole family: more television, more streaming services and partners, more series and films. More top-class sports. At home and on the go. Try it out easily without logging in or book it directly as part of a package and save money.



Beyond Core Services

More Magenta for your everyday life: In the future, we will not only support you with our telecommunications products, but also beyond. Already today, you can enjoy benefits in Magenta Moments and easy payment with Payzy – and soon even more.

Magenta Mobile – We democratize Unlimited

The more, the cheaper



Integrative & convergent!
Family & close ones

Affordable MagentaMobil offers for everyone in the family.



Simple & smart
Simplicity

Our tariffs offer a simple and smart solution for everyone.



Truly Unlimited
Without limits

We offer truly unlimited usage for the main card and all Plus cards without additional efforts.



The more, the cheaper!
Average price

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



UNLIMITED

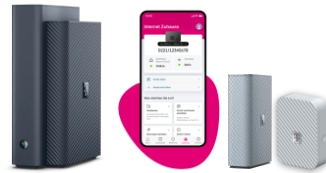
We democratize unlimited

Our MagentaMobil customers enjoy unlimited data volume starting with the MagentaMobil M tariff with just one Plus card. For M1 customers, this also applies to the MagentaMobil S plan.



Magenta Zuhause – your home internet hub

We connect Germany - now and forever - for the best experience at home!



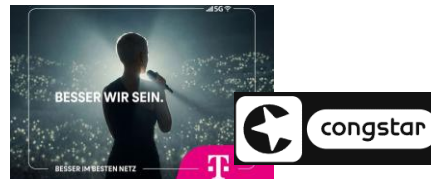
Highspeed at home

The best connectivity with the best Wi-Fi and the best service provides top internet speeds throughout your home.



Smart home

Use a router and app to intelligently connect your entire home and control it via your smartphone.



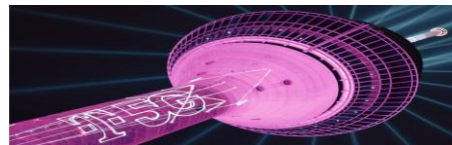
Suitable tariffs and offers for everyone

Our tariffs offer bandwidths for every type of internet use. Families, high uploads in the home office, or for young people.
New: Fast DSL from congstar – permanently affordable

T GLASFASER

Fiber – fast, reliable, and future-proof

Surfing at speeds of up to 2,000 Mbit/s is easily possible on the modern T-fiber network.



Hybrid 5G

Fast internet even where landlines don't offer enough performance. Hybrid combines landline and mobile bandwidth to offer high speeds.

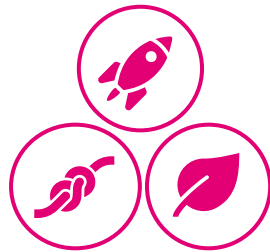


T Fiber to the home (FTTH)

Lifeline of the digital society



Only FTTH offers sufficient performance for today's and tomorrow's intensive data usage.



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



Every year, we connect more than 2.5 million households, business locations, and public institutions (e.g., schools) nationwide to the network of the future.



Magenta TV – television of the future

Our customers stream their favorite shows anytime, even on the go.



Time-independent television through restart, 7-day replay, timeshift, and recording



Widest range of channel selection w/ >180 channels, incl. >160 in HD* & 3 in UHD**, and excl. sports content e.g. 2026 FIFA World Cup



MagentaTV+ – Unique variety included with MagentaTV. Originals & exclusives, the best of ARD & ZDF, top international series and films, as well as highlights for kids & teens.



Best partner content w/ access to streaming services e.g RTL+, Netflix, Apple TV+, DAZN, Disney, WOW, plus video & media libraries



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



MagentaTV Freemium offers everyone a first glimpse of MagentaTV free of charge.

MagentaTV One



Enjoy an outstanding TV experience with MagentaTV and MagentaTV One. Easy installation. Flexible via LAN or Wi-Fi, independent of your internet provider.



* Starting with MagentaTV Smart

**UHD only possible with Telekom TV sets such as MagentaTV One, etc.

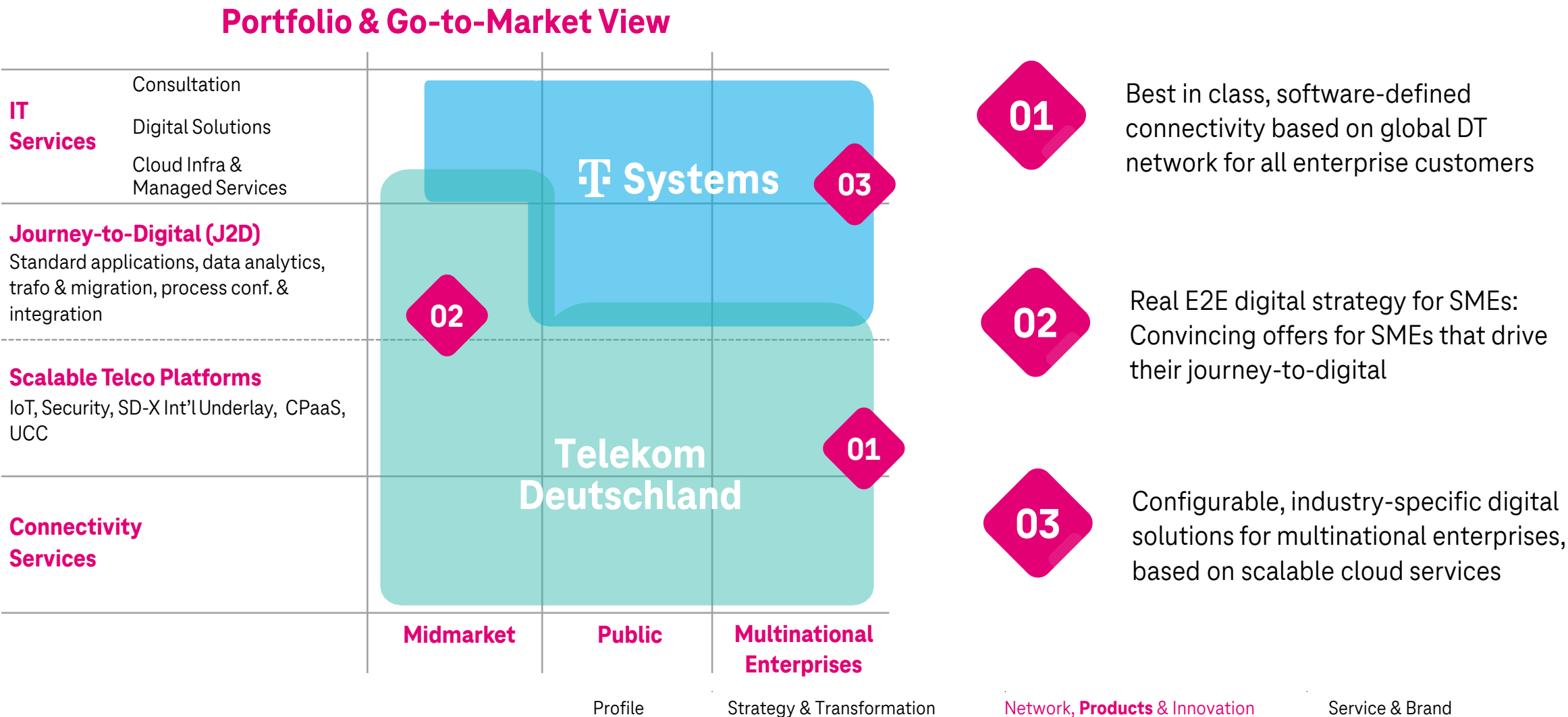
**** Overview of currently supported devices: <https://www.telekom.de/magenta-tv/tarife-und-optionen/magenta-tv-mit-app/geraete-uebersicht>

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

Digitalization

Cloud

Connectivity

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



About T-Systems

#1 ICT Service provider in Germany and **#2** in EMEA¹

#1 Public Cloud Platforms in Europe²

€4.1 bn revenue with **+3% growth** in 2025

15 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

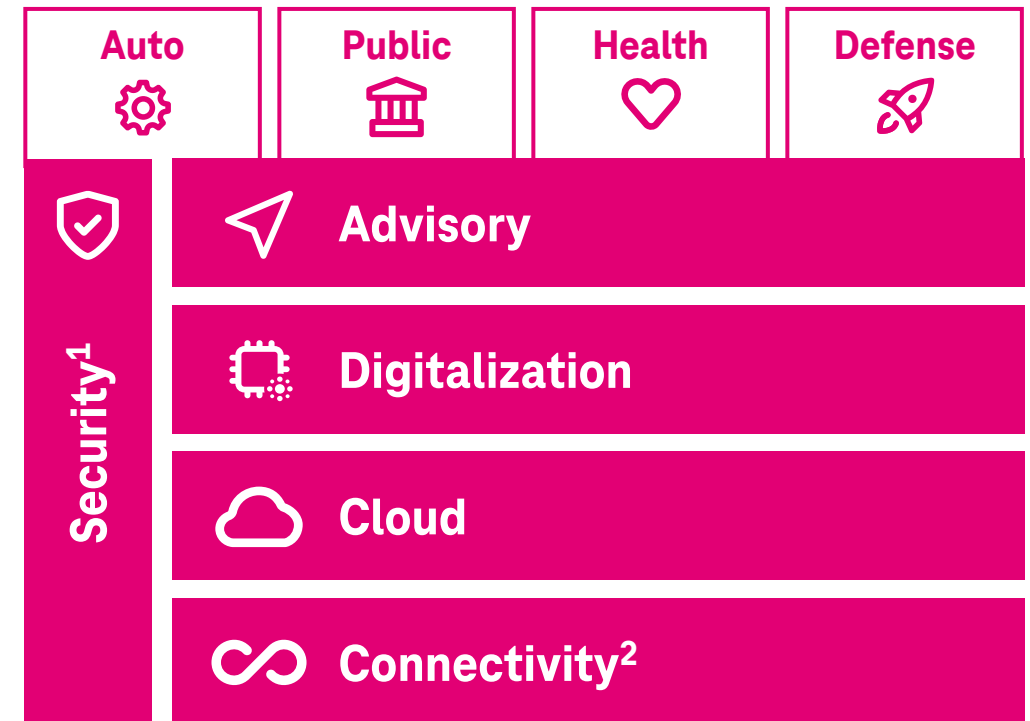
>1,000 customer references as proof points

>25,000 employees (FTEs) with **>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 **sovereign portfolio** follows our **strategy**



T-Systems is the **most** reliable ICT provider for enterprises. As **One T** we are one of the few that can **offer IT and connectivity** from just one source.



What T-Systems stands for

One T and **B2B competence** with a global footprint

E2E digital solutions, **driving digital transformation** in all industries

We perform in the **TOP 3rd** of its **peer group** in customer satisfaction ¹

>119 **leadership positions** in 29 analyst benchmark reports

We are in Europe **#1** **RISE with SAP premium supplier** with own RISE-certified private cloud

100% **Zero Outage culture** for quality and reliability

Our global portfolio combines **horizontal solutions** with **in-depth industry expertise**.

Automotive

- Customer experience
- Software-defined vehicle
- Industry-X
- Journey to the cloud

Public

- Digital public administration
- Public sector sustainability
- Digital sovereignty

Health

- Digitalization in hospitals
- Digital health insurance
- Telematic infrastructure 2.0
- Digitalization of care

Defense

- Digital infrastructure
- Transport operations
- Digital maintenance

Security¹

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

Advisory

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

Digitalization

Development of and support in your digitalization strategy

Cloud

Set-up and operations of multi-cloud environments

Connectivity²

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

Retail and Logistics

- Connected customer and staff
- Supply chain management
- Sustainable logistics utilities
- Retail IT modernization

Financial Services

- Digitalization and monetization
- Transformation and modernization
- Security and compliance

Manufacturing

- Accelerated innovation
- Resilient supply chains
- Smart, sustainable factories
- Connected products and services

Public Transport

- Digital infrastructure
- Transport operations
- Digital maintenance
- Passenger experience

Our latest opening:
Industrial AI Cloud!
A complete AI stack
built in **just 6 months.**



In cooperation with



We bring **AI power**
from **Germany** to Europe

Closing Europe's AI Sovereignty Gap

Europe lags in sovereign AI infrastructure, while **Global AI adoption** is booming. **Hyperscalers fall short** – long GPU wait times, high CapEx, low flexibility. **Strategic AI compute investment** is vital for Europe's digital competitiveness

Building Europe's AI Backbone Fast

Q1 2026: Go-live with sovereign, high-performance AI infrastructure
Launching Europe's first Industrial AI Cloud with **10,000 GPUs**
resulting in **50% more AI computing power in Germany**

The Engine Behind Europe's AI Cloud

Powered by **NVIDIA Blackwell Architecture**

DGX B200: For large-scale AI training and inference

RTX Pro 6000: For 3D simulations, digital twins,
and real-time applications

Sovereign AI Compute Power Provides

Data security: Location Germany, operation
100% by German companies, EU AI Act compliant

Resilience: to geopolitical tensions and short latency periods

Performance: GPU of the latest generation

**Come Cloud
with us!**
We have the
right cloud
for every
workload.



T-Systems: All-In-One Cloud Provider

T Cloud Public

**Europe's leading sovereign
public cloud – Sovereign &
Secure by Design**

- Data residency & operations fully within the EU
- GDPR, Gaia-X & EU AI Act compliant
- 80% hyperscaler core feature parity today

Best Match

**T Cloud Public x
Industrial AI Cloud**

- Sovereign AI Power for Europe
- A unique combination with seamless connectivity and AI capabilities

T Cloud Private

**Dedicated private clouds –
secure, flexible, fully managed**

- OpenStack-based private cloud platforms
- Operated in T-Systems data centers or on-premises
- Designed for regulated and mission-critical workloads
- Optional GPU power & confidential computing

US Clouds

**AWS, Microsoft Azure &
Google Cloud - integrated
and sovereignly operated**

- Consulting & migration services
- Unified operations, security & compliance model
- Reduced vendor lock-in

Global players and hidden champions trust us.



Long term customer relationships
and precise knowledge of the
respective industry sectors are
the basis of our success.

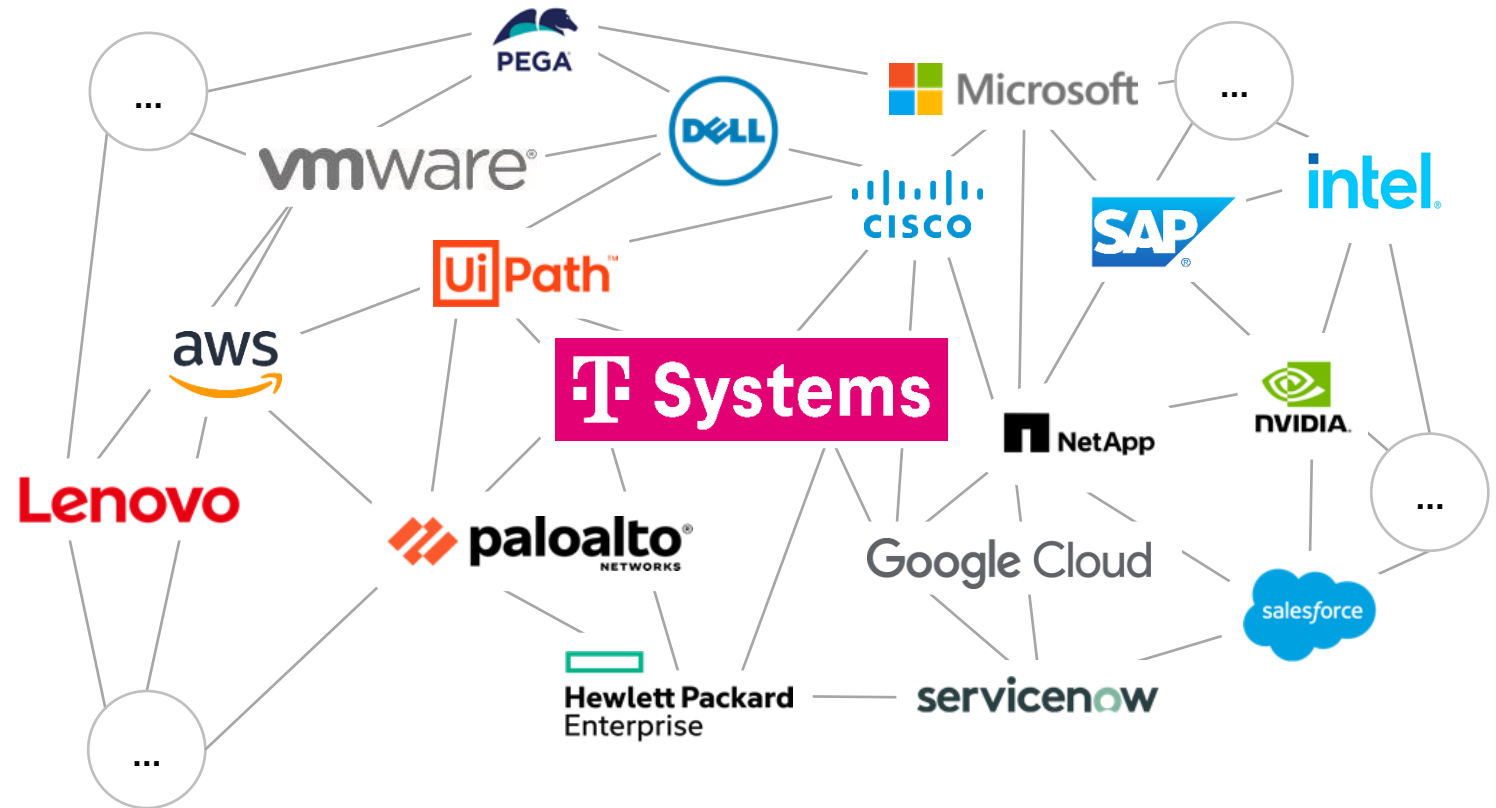


Our partner eco-system enables innovative solutions.



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

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



>25,000 engaged experts
with their passion and
skills are ready to provide
leading-edge digital
solutions for you.



#peoplemakethedifference

PASSIONATE AND 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 training courses 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

- Our team consists over 25,000 people in 26 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 in which 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.

Becoming the leading sustainable ICT Provider.

-55%

Emission reduction until **2030**
for Scope 1 - 3 (base year 2020)

0%

Net-zero Emissions along our
entire value chain until **2040**

100%

Sourcing of **Renewable**
Electricity since 2021



Data Centers

- Achieve PUE of $\leq 1,3$ for own data centers until end of 2027
- Increase energy efficiency and circularity



Fleet

- Push fleet electrification since 2022
- Our target: Achieve 100% e-fleet until 2028



Buildings

- Implement work concepts that empowers people
- Optimize and right-size office space



Customer Enablement

- Be an enabler for 360° responsibility through best-in-class digital solutions
- Assess the sustainability impact of our services and solutions (e.g. PCF)



Products/Portfolio

- Provide and increase green offerings
- Design our products and services in an innovative and responsible way



Suppliers & Partners

- Implement and improve our Telco Circularity Score
- Set the course for 2030: Green transition plan with our suppliers



Front runner

- Be a leading and recognized sustainable ICT provider
- Scale sustainability through AI and scale AI sustainably



Employees

- Make sustainability a business paradigm
- Live our Environmentally Sustainable Design and Green AI Principles



Awareness

- Enable employees and management team
- Communicate and report transparently
- Drive company-wide 'susTain'- program



We have leading ESG ambitions as part of Deutsche Telekom Group.

Our operations are CO₂ neutral since end of 2025 & we further reduce CO₂ emissions in our value chain.

We enable our customers' sustainability performance & collaborate with our suppliers.

We want to be a sustainability role model in the industry – our people make the difference.



Integral part of Deutsche Telekom: cloud, AI and offshore



Unprecedented customer satisfaction and quality



Trust, digital sovereignty, and sustainability



Cloud, AI, cybersecurity, and SAP
to drive our customers' digital transformation



Auto, Public, and Health remain our focus; adding **Defense**



Just the right size – combining **global reach**
with agility and **customer proximity**



People and portfolio levers,
including offshore growth and reskilling



Innovation with our **partner ecosystem**



Even better with One T, reinforcing our position
as the **leading ICT player**

Key takeaway:
**We are stronger
than ever.**
We are T-Systems.
We are T.

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



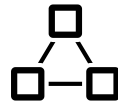
#1

most valuable European brand
most valuable telecommunications
brand in the world



99%

5G Coverage
in Germany



> 50%

Of german companies work
with our Telekom network



87

TRI*M-points B2B
(Customer satisfaction)



> 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

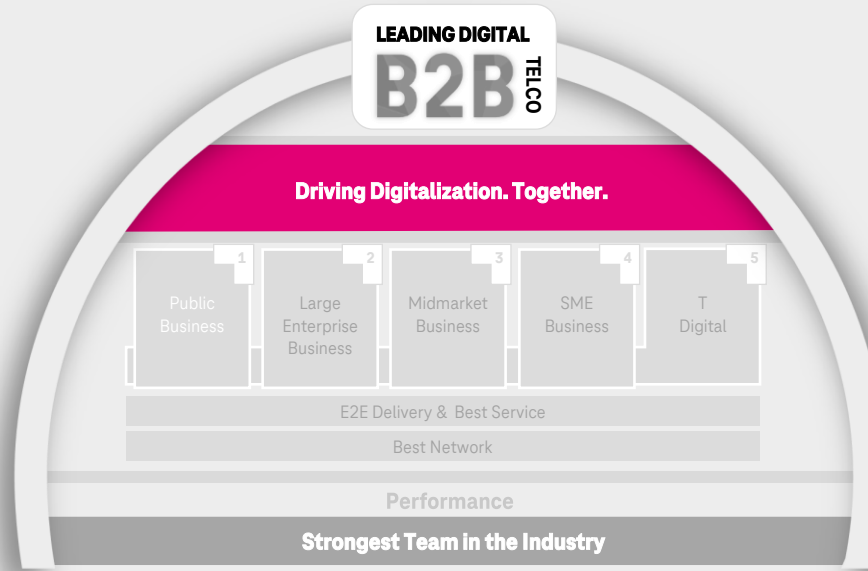
our
25,500 experts

take care together with
5,500 partners

for
your digitalization



Our Mission



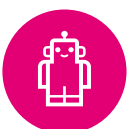
DRIVING DIGITALIZATION. TOGETHER.

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



Business

Achieving more together:

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

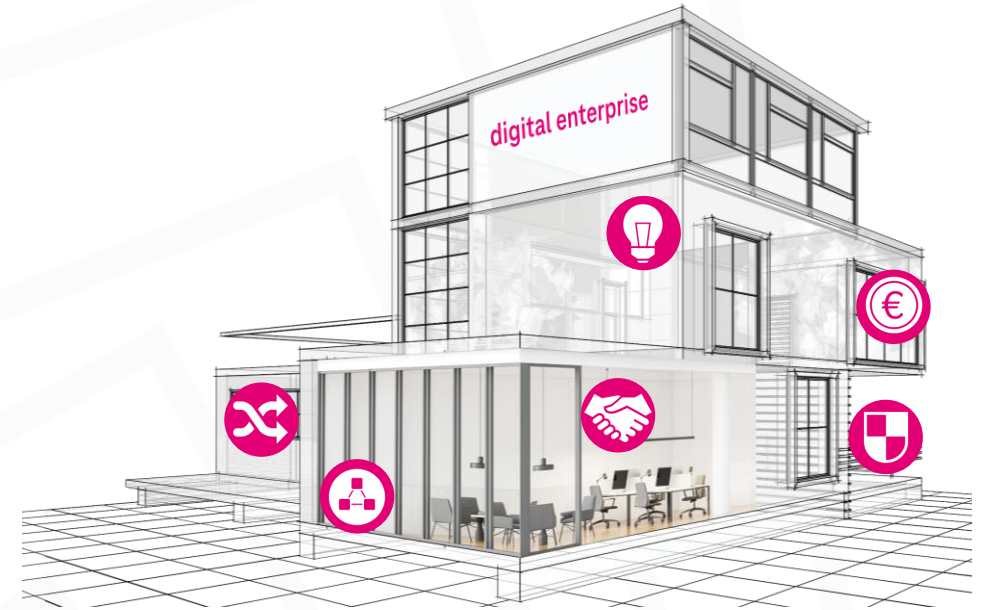


FUSE-AI



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

Digitalization as a driver for a **sustainable future**

Digitalization and sustainability go hand in hand: Digital solutions help companies make their sustainability measurable and achieve their sustainability goals. **We are partners and enablers of sustainability.**

DTAG Climate Goals

Net Zero

by 2040
(Scope 1-3)

-55%

CO2-emissions by 2030
(Scope 1-3)

100%

ready for circularity
by 2030

100%

Electricity from renewable
energy sources since 2021

Digital solutions from T Business

support you on your journey towards greater sustainability in your company.



With the **Telekom Sustainability Manager**, we provide an integrated portal for selected best-in-class sustainability solutions and a central platform for managing essential sustainability data.



Our **IoT solutions**, such as smart energy data management, fleet management, smart building, and predictive maintenance, can reduce electricity, fuel, and raw material consumption. This not only helps protect the climate but also saves costs.



With **circular business** models such as Device-as-a-Service or mobile phone buyback, we promote the circular economy.



Digitalizing schools is close to our heart: With the subsidized Telekom@School connections, we lay the foundation for digital learning. Additionally, we offer mobile phone rates for schools and much more.

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.**



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.

Open to the new

Innovation at Deutsche Telekom



Collaboration

Agility

Focus

Innovation in cooperation with Partners worldwide



Group Partnering

Scouting innovation worldwide

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

**TECH
BOOST**

Das Startup-
Programm der



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

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-Winning
Our Service

Digital Service

Frag Magenta,
MeinMagentaApp,
Telekom hilft“ Community

70 mn.

personal customer contacts
per year

Winner

of all relevant service tests

Our ambition: Best Sales & Service

Omnichannel, digital and personal



Reliable Service-Partner for private & business customers

- Approx. 16,400 people ensure the **best customer experience** in around **70mn personal customer contacts** per year
- For our customers, we deliver the **best Service, Sales & Troubleshooting**
- We offer **omni-channel services**: We personally **support** our customers by **phone**, in our **shops** and **on site** – with highest competence
- We develop and sell **tailor-made ICT solutions** from a single source
- We are **leading in service** – confirmed by independent tests, such as Connect and CHIP



Onlinechannels Our digital Service

- **"Frag Magenta"** is our **digital assistant** that helps our customers quickly and easily with service requests relating to invoices, contracts, relocations or faults since 2016
- Our **Digital touchpoints** (e.g. messaging, social media) offer **seamless service contact**
- We have Europe's **largest service community** with **"Kunden helfen Kunden"** and **"Telekom Hilft"**



Telekom Shops Schaufenster zu den Privat- & Geschäftskunden

- Excellent quality of advice and **first-class service experience** in 1,450 shops (own, partner, and retail)
- Advice and selling of **innovative products** and **partner offers**
- **State-of-the-art sales support** in an outstanding and sustainable shop design
- As hosts, we make the customer experience more attractive and easier with **personalized services**



Our Service Offerings

Leading in the Telco industry!



Hotline Tests

Our **service hotlines** are leading in waiting time, quality of answers & availabilities in **Mobile & Fixed Line and IPTV/streaming**



Shop Tests

Our **shops** are the best in the industry – This is the conclusion of Connect and CHIP in their shop tests!



Tests on digital service offerings

Compared to direct competitors, we are very well positioned **across all digital channels and touchpoints** - and have been awarded as **test winners**!



Chatbot Test

For the first time, CHIP tested chatbots – and awarded **Frag Magenta** as the **test winner**! Frag Magenta is particularly convincing with the **quality of answers**



Our Service Offerings

Digital Offerings for our Customers



Digital service channels

- We offer the best digital service via the **MeinMagenta App**, the **MeinMagenta customer center** (browser) and **WhatsApp/chat**
- In this way, we enable every customer to choose their preferred digital contact channel



Frag Magenta Chat- & Voice-Bot

- Our digital service assistant "**Frag Magenta**" answers customer questions quickly, easily and **around the clock**
- Accessible via browser, MeinMagenta app, WhatsApp and call



Fiber Portal

- Direct booking of the installation date in the portal – quick and easy for our customers
- Find out how to prepare for fiber optic installation quickly and conveniently with our online checklist



Mein Telekom Techniker

- We inform the customer when the service technician is on site.
- The customer has the option of rescheduling appointments online.
- Live status of the service technician
- The online service serves as a direct channel for customer feedback.



Appointment scheduling service

- Our customers can conveniently reschedule appointments in the provisioning process via self-service.
- Customers automatically receive confirmation of their new appointment via text message or email.





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.



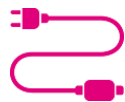
Private Customers

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



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 customers and partners in Germany and worldwide **tailor-made solutions**, comprehensive support, and a **broad portfolio** of wholesale services—supported by high-performance networks, **innovative platforms**, and **reliable services** for the dynamic communications industry.

(as at: Q4 2025)



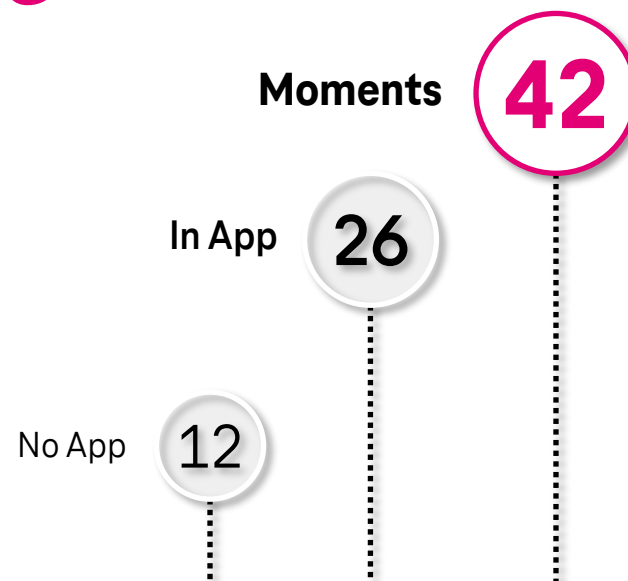
We turn customers into fans

MAGENTA MOMENTS - Our customer loyalty program

- ✓ Exciting & constantly changing **partner benefits**
- ✓ Exclusive access to **events** & great prize draws
- ✓ Real Telekom **benefits** such as our data bonus & hardware deals
- ✓ **Attractive gifts** without hooks & hidden subscriptions



MOMENTS users have a **3.5x** higher rNPS



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

Our brand



Our brand

#1

EUROPEAN BRAND

#1

TELECOMS BRAND

#1

GLOBAL BRAND

The World's 25 Most Valuable Brands 2026

#1  Apple \$607.6 bn +6%	#2  Microsoft \$565.2 bn +23%	#3  Google \$433.1 bn +5%	#4  Amazon \$369.9 bn +4%	#5  NVIDIA \$184.3 bn +110%
#6  TikTok/Douyin \$153.5 bn +45%	#7  Walmart \$141.0 bn +3%	#8  Samsung Group \$119.2 bn +8%	#9  Facebook \$107.1 bn +17%	#10  State Grid Corporation of China \$102.4 bn +20%
#11  T \$96.2 bn +13%	#12  ICBC \$90.9 bn +15%	#13  Instagram \$80.8 bn +1%	#14  China Construction Bank \$77.2 bn -2%	#15  Home Depot \$73.4 bn +13%
#16  Verizon \$73.0 bn +1%	#17  Bank of China \$70.8 bn +11%	#18  Oracle \$68.0 bn +19%	#19  Agricultural Bank of China \$62.8 bn -11%	#20  Toyota \$62.7 bn -3%
#21  Allianz Group \$60.7 bn +22%	#22  Moutai \$59.6 bn +2%	#23  American Express \$57.3 bn +45%	#24  United Healthcare \$54.7 bn +1%	#25  AT&T \$53.9 bn +3%

Brand Value

\$96.2 Billion

+141% from 2020 to 2026

Brand Value Global 500 2026
by Brand Finance plc, London

2007
8.5 BN USD



96.2
BN USD

verizon[✓]

73.0
BN USD



53.9
BN USD



18.9
BN USD

15.6
BN USD



5.9
BN USD

Source: Brand Finance Global 500

Unsere Überzeugung

We are digital optimists.

Unsere Mission

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

Purpose

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

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



VORREITE DIE WIR TREFFEN KÖNNEN +++ MOBILFUNK FAST TO GO* AUF DIGITAL K EN NEUER KOMPUTER MOBILER SENDEMAST SORGT AUF DER DIGITAL K FÜR DIE FLEXIBLE MICRO-CONT



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