This presentation contains forward-looking statements that reflect the current views of Deutsche Telekom’s management with respect to future events. They are generally identified by the words “expect,” “anticipate,” “believe,” “intend,” “estimate,” “aim,” “goal,” “plan,” “will,” “seek,” “outlook,” or similar expressions and include generally any information that relates to expectations or targets for revenue, adjusted EBITDA, or other performance measures. Forward-looking statements are based on current plans, estimates, and projections. 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. They include, for instance, the progress of Deutsche Telekom’s staff-related restructuring measures and the impact of other significant strategic or business initiatives, including acquisitions, dispositions, and business combinations. In addition, movements in exchange rates and interest rates, regulatory rulings, stronger than expected competition, technological change, litigation, and regulatory developments, among other factors, may have a material adverse effect on costs and revenue development. If these or other risks and uncertainties materialize, or if the assumptions underlying any of these statements prove incorrect, Deutsche Telekom’s actual results may be materially different from those expressed or implied by such statements. Deutsche Telekom can offer no assurance that its expectations or targets will be achieved. Without prejudice to existing obligations under capital market law, Deutsche Telekom does not assume any obligation to update forward-looking statements to account for new information or future events or anything else.

In addition to figures prepared in accordance with IFRS, Deutsche Telekom presents alternative performance measures, e.g., EBITDA, EBITDA margin, adjusted EBITDA, adjusted EBITDA margin, adjusted EBIT, adjusted EBIT margin, adjusted net profit/loss, free cash flow, gross debt, and net debt. These 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. For further information relevant to alternative performance measures, please refer to the section “Management of the Group,” page 38 et seq., of the annual report on the financial year 2017 or to Deutsche Telekom’s Investor Relations website at www.telekom.com/alternative-performance-measures.
DEUTSCHE TELEKOM
PROFILE

Customers & Markets

- 168 mn mobile customers
  28 mn fixed-network lines/
  19 mn broadband lines
- Approx. 7.4 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, 2017

- Revenue € 74.9 bn
- Adjusted EBITDA € 22.2 bn
- Free Cash-Flow € 5.5 bn

Employees & responsibility

- Employees worldwide: 217,349
- 6,559 trainees and cooperative degree students in Germany
- Pioneer of social issues
  (climate protection, data privacy, diversity, etc.)

Source: DT 2017 annual report/TMUS annual report to shareholders 2017
GERMANY

43.1 million mobile customers
13.2 million broadband lines
3.1 million IPTV customers incl. satellite

€ 21.9 billion revenue
€ 8.5 billion EBITDA adjusted
63,928 employees
101,901 employees in Germany overall

Financial figures taken from DT's 2017 annual report
DEUTSCHE TELEKOM

Facts & figures: EU & US

Financial figures taken from DT’s 2017 annual report/TMUS’ annual report to shareholders 2017

EUROPE & UNITED STATES

T-Mobile US:
72.6 million mobile customers

USD 40.3 billion revenue
USD 10.5 billion EBITDA adjusted
45,888 employees

Europe:
48.8 million mobile customers
5.6 million broadband lines
4.2 million IPTV, satellite, cable customers

€ 11.6 billion revenue
€ 3.7 billion EBITDA adjusted
47,421 employees
59,952 employees in EU overall

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

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

Financial figures taken from DT's 2017 annual report

€ 6.9 billion revenue
€ 0.5 billion EBITDA adjusted
37,924 employees
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
Sustainable products and innovations
E.g., environmentally friendly and accessible products, efficient data centers, ehealth

Social engagement & stakeholder mgmt.
E.g., promote employees’ social commitments, support education and competence in media

Environmental and climate protection
E.g., CO2 reduction, efficient use of resources, sustainable mobility

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

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:** 20% less CO2 by 2020 compared to 2008
  15 million tonnes less CO2 thanks to DT Services

- **Deutsche Telekom helps refugees**
  420 refugees integrated into the German labor market in 2017

- **Router leasing, “Blue Angel”, green tariff & Co:**
  40% turnover with more sustainable products (e.g. with eco-label), rental instead of purchase models & first green Edeka tariff

- **Supplier selection and development:**
  sustainability as a key criterion and active further training for our suppliers
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

GROW

LEAD IN CUSTOMER EXPERIENCE
ONE CONNECTIVITY & PERFECT SERVICE

LEAD IN TECHNOLOGY
INTEGRATED GIGABIT NETWORKS

LEAD IN BUSINESS PRODUCTIVITY
SECURE ICT SOLUTIONS & BIG IOT

SAVE FOR GROWTH INVESTMENTS

SIMPLIFY, DIGITALIZE, ACCELERATE
FUTURE GROWTH IS FUELED BY THREE MAIN PILLARS

- LEAD IN CUSTOMER EXPERIENCE
- LEAD IN TECHNOLOGY/NETWORKS
- LEAD IN BUSINESS PRODUCTIVITY
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...

- **Magenta ID**
- **Customer Touchpoints**
  - (Shop, Call Center, App etc.)

...and resonating with customers

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

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

<table>
<thead>
<tr>
<th>Communication (Voice, Messaging, Video)</th>
<th>Entertainment (TV, Video, Music, Gaming)</th>
<th>Smart Home (Qivicon, Voice Hub etc.)</th>
<th>Consumer IT (Cloud etc.)</th>
<th>Security</th>
<th>...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Devices/Hardware</strong></td>
<td><strong>Magenta Connectivity</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mobile</td>
<td><strong>Magenta ID</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fixed</td>
<td><strong>Communication</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partner</td>
<td><strong>Entertainment</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Smart Home</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Consumer IT</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Security</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Approximately 40%**
- **21%**
- **2017**
- **2021e**
We strive for perfect customer 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

DER SERVICE

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

TEAM OF EXPERTS (TEX)

Contact resolution within 24h

Rate of complaints

Net promoter score

Customer service satisfaction

Contact resolution within 24h

Rate of complaints

Net promoter score

Customer service satisfaction

¹ Formerly MagentaSERVICE App ² Q1 2018

We treat service as a key differentiator...

...reflected in our high ambitions

Rate of complaints 2017: 4%  2021e: ≈ 1%

Contact resolution within 24h 2017: 66%  2021e: > 80%

Net promoter score 2017: 34 pts.  2021e: 45 pts.

Customer service satisfaction 2017: 74%  2021e: 76%
WE ARE “DEDICATED NETWORK INVESTORS”

**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)
- **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, MobiledgeX launched

1 Bandwidth ≥ 50 Mbps, delayed due to regulatory decisions
MOBILE NETWORK LEADERSHIP EVERYWHERE

Germany

Macro cell sites, k

27
2017

36
2021e

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

Europe

Macro cell sites, k

41
2017

47
2021e

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

TMUS

Macro cell sites, k

61
2017

+ Small Cells

Extend network capacity & density to pave way for 5G
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 2019
- 80% DT infrastructure
- 95% incl. wholebuy

Gigabit networks (≥1 Gbps)

Start FTTH rollout from 2018
- New residential areas
- Business parks
- Telekom@School

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

Monetization (regulation)

Competition (price, speed)

Customer demand

Political & public demand

DEUTSCHE TELEKOM

STRATEGY & TRANSFORMATION

NETWORK, PRODUCTS & INNOVATION

SERVICE & BRAND

20
...AND INTEGRATING GIGABIT NETWORKS IN EUROPE

Uniquely positioned to drive FMC...

Converged Leaders

Converged Challengers

TELE2 merger

Fixed BB rollout planned

acquisition

...and further drive broadband rollout

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>17%</td>
</tr>
<tr>
<td>2021e</td>
<td>30%</td>
</tr>
</tbody>
</table>

- 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
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...

<table>
<thead>
<tr>
<th>Connectivity-Based Converged ICT Portfolio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cloud</td>
</tr>
<tr>
<td>Software/Applications</td>
</tr>
<tr>
<td>IoT</td>
</tr>
<tr>
<td>Security</td>
</tr>
</tbody>
</table>

- Fixed & Mobile Connectivity (incl. NB-IoT, M2M & Campus Networks)

...to grow in SMB digitalization

<table>
<thead>
<tr>
<th>B2B revenue Germany, € bn</th>
<th>6.0</th>
<th>+2%</th>
<th>6.5</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>B2B revenue Europe, € bn</th>
<th>3.2</th>
<th>+3%</th>
<th>3.6</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
CLEAR TURNAROUND PLAN FOR T-SYSTEMS

Preserving optionality with portfolio-based steering...

- TC CORE
  - Fixed Line Services
  - Mobile Services

- GROWTH-PORTFOLIOS
  - Digital Solutions
  - SAP
  - IoT
  - Public Cloud/Managed Services
  - Road Charging
  - Classified ICT
  - Security

- CLASSIC IT
  - Dedicated SI Solutions
  - Managed Infrastructure Services & Private Cloud

Revenues 2017

- €2.2 bn

CAGR 2017–2021e

- €2.1 bn

- €2.5 bn

...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

LEAD IN CUSTOMER EXPERIENCE

LEAD IN TECHNOLOGY/NETWORKS

LEAD IN BUSINESS PRODUCTIVITY

SAVE FOR GROWTH INVESTMENTS

SIMP典礼, DIGITALIZE, ACCELERATE
EFFICIENCY TO FUND INVESTMENTS INTO GROWTH

Accelerated cost reduction...

Indirect Costs DT Group ex US, €bn

- 2017: 18.5
- 2021e: 17.0
- 1.5

- 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

- DEUTSCHLAND: -€0.8 bn
- EUROPE: -€0.4 bn
- T·Systems: -€0.1 bn
- GHS: -€0.2 bn

Address cost savings potential more effectively than in the past
Focus on operational excellence and lean organizational structure (e.g. enabled by digitalization)
DIGITAL TRANSFORMATION TO ADDRESS UNTAPPED POTENTIAL

We have started our E2E digitalization...

We digitalize our touchpoints:
“Mein Magenta App” in Germany\(^1\), 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

<table>
<thead>
<tr>
<th>Share of resolved requests in digital channels(^2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
</tr>
<tr>
<td>2021e</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>One App Penetration</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
</tr>
<tr>
<td>2021e</td>
</tr>
</tbody>
</table>

\(^1\) Formerly MagentaSERVICE App
\(^2\) E-Service Share Interaction, year end 2017
### OUR STRATEGIC CORE BELIEFS

<table>
<thead>
<tr>
<th>We relentlessly strive for leadership in customer experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>- We provide one seamless global T-connectivity</td>
</tr>
<tr>
<td>- We offer the leading FMC proposition based on simple &amp; modular products</td>
</tr>
<tr>
<td>- Our sales experience is truly omnichannel, and our service is digital, proactive, and ‘perfect’</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>We lead in technology with future-proof &amp; integrated Gigabit networks</th>
</tr>
</thead>
<tbody>
<tr>
<td>- We maximize Gigabit coverage with future-proof fiber networks and alternative technologies such as FWA/5G</td>
</tr>
<tr>
<td>- Software-defined networks enable real-time operations</td>
</tr>
<tr>
<td>- We operate one central &amp; virtualized production model to realize group-wide synergies</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>We are the leading partner for business productivity</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Secure and reliable ICT solutions drive end-to-end digitalization of our business customers</td>
</tr>
<tr>
<td>- Our horizontal platforms and vertical solutions enable the Internet of Things</td>
</tr>
<tr>
<td>- Partner products and services enhance our core proposition</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>We strive for a benchmark cost structure and re-invest into growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Benchmark efficiency is necessary to preserve our competitiveness &amp; maintain high investment volumes</td>
</tr>
<tr>
<td>- Organic and inorganic investments spur growth in our core business and selected adjacencies</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>We constantly digitalize, simplify and accelerate our operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Digitalization increases our efficiency and improves customer experience</td>
</tr>
<tr>
<td>- We build a radically simplified and agile IT architecture</td>
</tr>
<tr>
<td>- Our people are empowered to take ownership, collaborate across silos, and work in a truly agile way</td>
</tr>
<tr>
<td>- We take a flexible &amp; step-wise approach to effectively implement our strategy</td>
</tr>
</tbody>
</table>

We are THE trusted partner for our customers’ digital needs
DEUTSCHE TELEKOM COMPANY PRESENTATION
OVERVIEW

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

DEUTSCHE TELEKOM  STRATEGY & TRANSFORMATION  NETWORK, PRODUCTS & INNOVATION
Numbers, Data, Facts  SERVICE & BRAND
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

- WiFi
- Optical fiber/VDSL
- Mobile communications/mobile Internet
- Hybrid router
- IP telephony

Entertainment

Innovative services

Smart Home
PRODUCTS & SERVICES CONSUMERS
EXAMPLE: GERMANY

MagentaONE

CLOUD
COMMUNICATION
LIVING
ENTERTAINMENT

MAGENTA HOME
MAGENTA MOBIL

SERVICE
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

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

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-Dienste

DEUTSCHE TELEKOM: PROFIL
STRATEGIE & TRANSFORMATION
NETZ, PRODUKTE & INNOVATION
SERVICE & MARKE
Produkte: Entertainment
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

Collaboration

Mobile company (cloud services)

Energy

Automobile

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

TECHNOLOGISCHE UNABHÄNGIGKEIT
- Extensive partner ecosystem
- Hybrid/multi-cloud competence
- Integration expertise

DEUTSCHE TELEKOM
STRATEGY & TRANSFORMATION
NETWORK, PRODUCTS & INNOVATION
B2B
SERVICE & BRAND
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)
## Worldwide deliverability

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of data centers (globally)</td>
<td>37 data centers (DCs)</td>
</tr>
<tr>
<td>Gross DC space (m²)</td>
<td>71,000 m²</td>
</tr>
<tr>
<td>Twin-core DC</td>
<td>17 twins</td>
</tr>
<tr>
<td>Help desk in</td>
<td>21 countries</td>
</tr>
</tbody>
</table>

## Scalable platforms

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Systems on standard</td>
<td>54,000</td>
</tr>
<tr>
<td>MIPS</td>
<td>133,000 MIPS</td>
</tr>
<tr>
<td>Storage</td>
<td>316,000 TB</td>
</tr>
<tr>
<td>SAPS</td>
<td>850,000 SAPS</td>
</tr>
<tr>
<td>SAP users</td>
<td>6.7 million users</td>
</tr>
</tbody>
</table>

as of: Q2/2017
UNIQUE CAPABILITIES AND A STRONG PARTNER-ECOSYSTEM

MODERN AND SECURE NETWORKS
1. smart Network ngena

COMPLEX BUSINESS SOLUTIONS INTRODUCTION AND SUPPORT
3,000 SAP experts worldwide
8,000 SI-forces

COMPREHENSIVE SECURITY OFFERS
Europe’s largest cyber defense and security centre

DYNAMIC AND AGILE IT
65,000 active cloud systems

NEW INTELLIGENT PLATFORMS
Data Analytics Hub

BALANCED PARTNER ECOSYSTEM OF ESTABLISHED AND INNOVATIVE PARTNERS MAKES VISIONS REAL

>2.000 best-of-breed technology partner, investments in >100 start-ups

INNOVATIONS
Augmented/ Virtual Reality
Artificial Intelligence
Edge Computing
Blockchain

DEUTSCHE TELEKOM
STRATEGY & TRANSFORMATION
NETWORK, PRODUCTS & INNOVATION
B2B
SERVICE & BRAND
INNOVATION AT DEUTSCHE TELEKOM
WE FOLLOW 3 BASIC PRINCIPLES

Portfolio & Innovation Board

Corporate Innovation Fund

4+1 Priorities in Innovation

COLLABORATION

BUSINESS UNITS WORK TOGETHER ACROSS DIVISIONS

AGILITY

SPEED & FLEXIBILITY THROUGH FINANCIAL STAKES

FOCUS

LONG-TERM STRATEGIC INITIATIVES

CONNECTIVITY

HOME

INTERNET OF THINGS

DIGITIZATIONS OF SALES & SERVICE

5G / LOW LATENCY
... 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

TIME TO MARKET

short term

long term
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
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 view of business enables us, like our customers, to make the most of life and its multitude of possibilities, spontaneously and proactively.

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.
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